

# Banner Financial Aid Algorithmic Packaging Training Workbook

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**Revision History Log**

Publication Date	Summary
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10/17/2008	New version that supports Banner 8 software.
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Think before you print.

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# Introduction



## Course goal

The goal of this workbook is to introduce you to the features of Algorithmic Packaging and to provide you information needed to utilize the Algorithmic Packaging functionality within Banner 8. This workbook is divided into three sections

- Introduction
- Set-up
- Day-to-day operations.

## Course objectives

In this course you will learn how to

- identify all of the set-up forms required for Algorithmic Packaging
- assign code names to be utilized by other Banner forms
- create basic rules that support Algorithmic Packaging
- define fund categories
- assign funds to multiple categories
- place fund category maximum allowances on packaging groups
- enter and maintain resource information
- assign a student to a packaging group either automatically online, manually, or in batch

- award a student's funds based on rules, in batch or automatically online
- manually award additional funds following automatic packaging to meet any remaining unmet need
- send award letters
- award, accept, and decline/cancel funds manually and through mass entry.

## Intended audience

Financial Aid office administrators and staff.

## Prerequisites

To complete this course, you should have

- completed the Training Services computer-based training (CBT) tutorial *Banner 8 Fundamentals*, or have equivalent experience navigating in the Banner system
- completed the Financial Aid Overview training workbook
- a minimum working knowledge of SQL for building rules
- administrative rights to create the rules and set the validation codes in Banner.

# Process Introduction

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## Introduction

The purpose of this section is to outline the set-up process and detail the procedures to set up your Banner system to package student awards using the Algorithmic Packaging functionality.

### Banner Algorithmic Packaging

- enables predictive modeling to support an institution's enrollment
- provides a management strategy to help an institution manage complex calculations to award the right funds to the right students
- allows an institution to package multiple financial aid awards based upon configurable rules and calculations that support an institution's awarding philosophies
- includes the addition of new functionality to allow the use of algorithms as part of the fund awarding sequence within the current packaging process.



# Set Up



## Section goal

The goal of this section is to outline the set-up process and detail the procedures to set up your Banner system to algorithmic package student awards.

Banner provides users with the ability to create a set of ordered rules or steps for the automatic packaging of financial aid funds. The rules or steps allow the use of mathematical expressions as part of the awarding rules and logic for a particular fund within a packaging group based upon data elements within the student and/or financial aid system.

Examples of rules created through the algorithmic package option include

- Award Fund 1 with a maximum of \$1,000 and minimum of \$200 not to exceed unmet need
- Award Fund 2 up to 50% of Fund 1, not to exceed unmet need
- Award Fund 3 up to 25% of Fund 1 total + 25% of Fund 2 total, not to exceed unmet need Award
- Fund 4 up to 70% of remaining unmet need, not to exceed the total of Fund 1 Award
- Fund 5 up to 100% of remaining unmet need.

## Objectives

In this section you will learn how to

- identify all of the set-up forms required for Algorithmic Packaging
- assign code names to be utilized by other Banner forms
- create basic rules that support Algorithmic Packaging
- define fund categories
- assign funds to multiple categories
- place fund category maximum allowances on packaging groups.

# Algorithmic Packaging Rules Code Validation Form

## Purpose

The Algorithmic Packaging Rule Code Validation Form (RTVALGR) enables you to define algorithmic packaging rule codes for use on the Algorithmic Packaging Rules Form (RPRALGR), Packaging Rules Form (RPRPCKR) and Packaging Group Fund Rules Form (RPRGFND).

## Banner form

Code	Description	Active	Activity Date
123456789012345678901234567890	1234567890123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890	<input checked="" type="checkbox"/>	16-NOV-2007
BOBCODE	Bob's Inactive Test Rule	<input type="checkbox"/>	05-NOV-2007
BOBCODE2	An Active Test Rule	<input checked="" type="checkbox"/>	05-NOV-2007
CJS_ACTIVE_ALGO_PKG_RULE	Carolyn's Active Algo Rule	<input checked="" type="checkbox"/>	07-NOV-2007
CJS_INACTIVE_ALGO_PKG_RULE	Carolyn's Inactive Algo Rule	<input type="checkbox"/>	07-NOV-2007
DEB_BUDG_TUITION_RULE	Deb's test rule for tuition budgeting	<input checked="" type="checkbox"/>	02-JUL-2008
DEB_ERROR_RULE	Deb's rule to return an error	<input checked="" type="checkbox"/>	02-OCT-2007
DEB_INACTIVE	Deb's Inactive Rule Code	<input checked="" type="checkbox"/>	28-NOV-2007
DEB_NULL_RULE	Deb's rule to return null	<input checked="" type="checkbox"/>	02-OCT-2007
DEB_RULE	Deb's rule to return a valid amount	<input checked="" type="checkbox"/>	02-OCT-2007
DEB_TEST	Deb's test rule	<input checked="" type="checkbox"/>	31-OCT-2007
DEB_TEST2	Deb's 2nd test rule	<input checked="" type="checkbox"/>	31-OCT-2007
DEB_ZERO_RULE	Deb's rule to return zero	<input checked="" type="checkbox"/>	02-OCT-2007
HAL	Hal's test rule	<input type="checkbox"/>	07-NOV-2007
HAL10	hal's rule 10	<input checked="" type="checkbox"/>	02-NOV-2007
HAL2	Hal's second test rule	<input checked="" type="checkbox"/>	16-NOV-2007
HAL3	Hal's third test rule	<input checked="" type="checkbox"/>	31-OCT-2007
HAL4	hal's rule 4	<input checked="" type="checkbox"/>	02-NOV-2007
HAL5	hal's rule 5	<input checked="" type="checkbox"/>	02-NOV-2007
HAL6	hal's rule 6	<input checked="" type="checkbox"/>	02-NOV-2007
HAL7	hal's rule 7	<input checked="" type="checkbox"/>	02-NOV-2007

## Field options

See descriptions of the fields below.

Field	Description
Code	A distinguishable algorithmic packaging rule code created by you. This field allows up to thirty characters.
Description	A description of the packaging rule. This field allows up to 200 characters.

## Steps

Follow these steps to define a code.

1. Access the Algorithmic Packaging Rule Code Validation Form (RTVALGR).
2. Enter a code for the rule in the **Code** field.
3. Enter a description of the rule in the **Description** field.
4. Ensure the **Active** indicator is checked.
5. Click the **Save** icon.
6. Click the **Exit** icon.

# Algorithmic Packaging Rules Form

## Purpose

The Algorithmic Packaging Rules Form (RPRALGR) enables you to use algorithmic packaging rules to award funds. On this form, SQL statements are written to define algorithmic packaging rules, which are arranged by rule code and sequence number.

## Banner form

The screenshot shows the 'Algorithmic Packaging Rules - RPRALGR 8.0 (C800)' window. At the top, there are fields for 'Aid Year' (0809) and 'Rule' (ACADEMIC). Below this, the 'Sequence' is set to 1, with checkboxes for 'Validated', 'Active', 'Validate', and 'Test Rule'. The 'Award Minimum' and 'Award Maximum' are both set to 5,000.00. The 'User ID' is FAISUSR and the 'Activity Date' is 10-SEP-2008. The 'SQL Statement' field contains the following code:

```
SELECT '5000' FROM SORTEST,RPRAWRD
WHERE SORTEST_TESC_CODE = 'RA01' AND
RPRAWRD_FUND_CODE = 'RUACHO' AND
RPRAWRD_AIDY_CODE = '0708' AND
SORTEST_PIDM = RPRAWRD_PIDM
```

Below the SQL statement, there is an 'Available for Lookup' section with fields for 'Table', 'Column', and 'Parameter'. At the bottom, the 'Copy To' section includes fields for 'Aid Year', 'Rule', and 'Sequence', along with a 'Copy All Sequences' checkbox and a 'Copy' button.

## Field options

See descriptions of the fields below.

Field	Description
Sequence	The order the rule should be reviewed. For example, if the rule is Seq #1 EFC between 100-200 and Seq #2 EFC is between 200-300, Banner will look at the first sequence to see if the student fits the role. If it does not, Banner will move to the next sequence.
Award Minimum	Controls the award minimum in several locations in Banner. Primarily, you will be controlling them on RPRGFND and RPRALGR. Banner will use the less restrictive amount for the Minimum of the two forms.
Award Maximum	Controls the award maximum in several locations in Banner. Primarily, you will be controlling them on RPRGFND and RPRALGR. Banner will use the most restrictive amount for the Maximum of the two forms.
SQL Statement	Contains the SQL statement for each sequence.

## Steps

Follow these steps to complete the Algorithmic Packaging Rules Form.

1. Access the Algorithmic Packaging Rules Form (RPRALGR).
2. Enter the code from the RTVALGR form in the **Rules** field in the key block.
3. Perform a **Next Block** function.
4. Enter a sequence number in the **Sequence Number** field.
5. Click in the **SQL Statement** field.

Note: Rules need to be in expert mode.

6. After your statement is written, click on **Validate**. This is used to verify that the rule has been written correctly.

Result: A pop up message will appear indicating "SQL statement has been validated". If this message is not received, review the rules and make necessary corrections.

7. Enter a minimum allowable amount for this sequence in the **Award Minimum** field.
8. Enter a maximum allowable amount for this sequence in the **Award Maximum** field.
9. Identify a **User ID** from the ROISARI form that meets your rule.
10. Click the **Test Rule** button and enter the student ID in the pop up block.
11. Use the **Table**, **Column** and **Parameter** lookup fields to search by a specific table, column or parameter.

Note: The column options are populated based on your table selection.

12. Select **Execute** from the **Query** menu.
13. Verify that the Calculated Amount fits within your award parameters.
14. Copy the rule to another rule or sequence number and modify.
15. Repeat the process as many times as necessary keeping in mind that you can use one rule for many funds.

Example: If you are awarding State Scholarships, SEOG and the Cooley Scholarship based on the same EFC break down, you only need to create the rule once and attach it to each fund.

16. Click the **Save** icon.
17. Click the **Exit** icon.

# Packaging Rules Form

## Purpose

With the Packaging Rules Form (RPRPCKR), you have the ability to link your Algorithmic Packaging rule to a particular Packaging Group when using GAP, Equity or Self-Help Packaging.

## Banner form

Packaging Rules: RPRPCKR 8.0 (s10b80)

Aid Year: 0809 Packaging Group:

	GAP Packaging	Equity Packaging	Self-Help Packaging
Percent of Gross Need:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Percent of Budget:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Amount:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Algorithmic Rule Code:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Minimum Award:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Maximum Award:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Activity Date:	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Steps

Follow these steps to link your packaging rule to a packaging group.

1. Access the Packaging Rule Form (RPRPCKR).
2. Enter the packaging group code in the **Packaging Group Code** field.
3. Perform a **Next Block** function.
4. Enter the algorithmic rule code in the **Algorithmic Rule Code** field by typing in the code or using the drop down menu and double-clicking on the appropriate code.
5. Click the **Save** icon.
6. Click the **Exit** icon.

# Packaging Group Fund Rules Form

## Purpose

You have the ability to link your Algorithmic Packaging rule to a particular fund within a Packaging Group. The Packaging Group Fund Rules Form (RPRGFND) is used to establish fund-specific rules for your packaging group.

## Banner form

The screenshot shows a web application window titled "Packaging Group Fund Rules RPRGFND 8.0 (s10b80)". At the top, there are two dropdown menus: "Aid Year:" with the value "0809" and "Packaging Group:". Below this is a table titled "Packaging Group Fund Rules". The table has the following columns: "Fund", "Short Description", "Priority", "Minimum Award Amount", "Maximum Award Amount", "Percent of Unmet Need", "EFC Method", "Algorithmic Rule Code", and "Activity Date". Each column contains a series of empty input fields. At the bottom of the form, there is a "Copy To" section with "Aid Year:" and "Packaging Group:" dropdown menus, and a "Copy" button with a document icon.

## Steps

Follow these steps to link your packaging rule to a fund.

1. Access the Packaging Group Fund Rules Form (RPRGFND).
2. Select a code in the **Packaging Group** field.
3. Perform a **Next Block** function.

4. Click in the **Fund Code** field in the Packaging Group Fund Rules block and use the List of Values to select the funds to be awarded in this packaging group.

Note: Select a variety of funds (except Pell Grant, whose packaging process, RPEPELL, occurs outside of the RPEPCKG Process) including grants, loan, and work.

5. Enter the algorithmic rule code in the **Algorithmic Rule Code** for the algorithmic packaging rule that determines the amount of the student's self-help awards during packaging.

Note: Funds can be a combination of funds with algorithmic rules and those without algorithmic rules.

6. Click the **Save** icon.

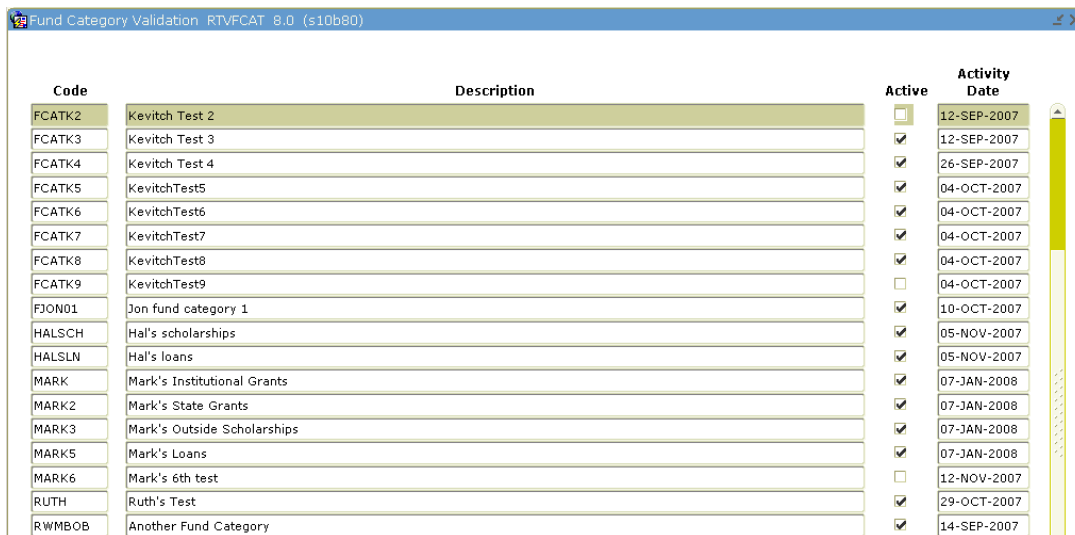
7. Click the **Exit** icon.

# Fund Category Validation Form

## Purpose

The Fund Category Validation Form (RTVFCAT) enables you to define fund categories for use on the Fund Base Data Form (RFRBASE).

## Banner form



Code	Description	Active	Activity Date
FCATK2	Kevitch Test 2	<input type="checkbox"/>	12-SEP-2007
FCATK3	Kevitch Test 3	<input checked="" type="checkbox"/>	12-SEP-2007
FCATK4	Kevitch Test 4	<input checked="" type="checkbox"/>	26-SEP-2007
FCATK5	KevitchTest5	<input checked="" type="checkbox"/>	04-OCT-2007
FCATK6	KevitchTest6	<input checked="" type="checkbox"/>	04-OCT-2007
FCATK7	KevitchTest7	<input checked="" type="checkbox"/>	04-OCT-2007
FCATK8	KevitchTest8	<input checked="" type="checkbox"/>	04-OCT-2007
FCATK9	KevitchTest9	<input type="checkbox"/>	04-OCT-2007
FJON01	Jon fund category 1	<input checked="" type="checkbox"/>	10-OCT-2007
HALSCH	Hal's scholarships	<input checked="" type="checkbox"/>	05-NOV-2007
HALSLN	Hal's loans	<input checked="" type="checkbox"/>	05-NOV-2007
MARK	Mark's Institutional Grants	<input checked="" type="checkbox"/>	07-JAN-2008
MARK2	Mark's State Grants	<input checked="" type="checkbox"/>	07-JAN-2008
MARK3	Mark's Outside Scholarships	<input checked="" type="checkbox"/>	07-JAN-2008
MARK5	Mark's Loans	<input checked="" type="checkbox"/>	07-JAN-2008
MARK6	Mark's 6th test	<input type="checkbox"/>	12-NOV-2007
RUTH	Ruth's Test	<input checked="" type="checkbox"/>	29-OCT-2007
RWMBOB	Another Fund Category	<input checked="" type="checkbox"/>	14-SEP-2007

## Steps

Follow these steps to define a fund category.

1. Access the Fund Category Validation form (RTVFCAT).
2. Enter up to 6 characters in the **Code** field.
3. Enter up to 200 characters in the **Description** field for the code you created.
4. Ensure the **Active** indicator is checked.
5. Click the **Save** icon.
6. Click the **Exit** icon.



# Packaging Group Fund Category Maximums Rules Form

## Purpose

The Packaging Group Fund Category Maximums Rules Form (RPRFCAT) allows you to place Fund Category maximums on packaging groups. This will ensure that students that fall into a particular packaging group only receive a maximum dollar amount from all the funds listed within the Fund Category.

## Banner form

The screenshot shows a software window titled "Packaging Group Fund Category Maximums Rules RPRFCAT 8.0 (s10b80)". At the top, there is a field for "Aid Year" with the value "0809" and a dropdown arrow. Below this is a table titled "Packaging Group Fund Category Maximums". The table has six columns: "Packaging Group", "Group Description", "Fund Category", "Category Description", "Maximum Amount", and "Activity Date". The "Packaging Group" and "Fund Category" columns contain dropdown menus. The table is currently empty. At the bottom of the window, there is a "Copy To" section with an "Aid Year" field and a "Copy" button with a document icon.

## Steps

Follow these steps to place a fund category maximum.

1. Access the Packaging Group Fund Category Maximums form (RPRFCAT).
2. Perform a **Next Block** function.
3. Enter the packaging group code in the **Packaging Group Code** field.
4. Enter the fund category code in the **Fund Category Code** field.
5. Enter the maximum amount in the **Maximum Amount** field.
6. Click the **Save** icon.
7. Click the **Exit** icon.

# Self Check

---

## Directions

Use the information you have learned in this workbook to complete this self-check activity.

## Question 1

The purpose for using the Algorithmic Packaging Rule Code Validation Form (RTVALGR) is to

- a. link fund categories to funds.
- b. create a packaging group.
- c. define rule codes to be used in future rules forms.
- d. award funds to students.
- e. link rules to packaging groups.

## Question 2

Which form allows you to link a Fund Category to a particular fund?

- a. Fund Base Data Form
- b. Packaging Rules Form
- c. Fund Category Validation Form
- d. Packaging Group Fund Rules Form
- e. Algorithmic Packaging Rules Code Validation Form

### Question 3

Which form must be completed before utilizing the Algorithmic Packaging Rules Form (RTVALGR)?

- a. Fund Base Data Form
- b. Packaging Rules Form
- c. Fund Category Validation Form
- d. Packaging Group Fund Rules Form
- e. Algorithmic Packaging Rules Code Validation Form

### Question 4

The Packaging Group Fund Rules Form establishes fund-specific rules for your packaging group.

True or False

### Question 5

You can use one rule for multiple funds.

True or False

# Answer Key for Self Check

---

## Question 1

The purpose for using the Algorithmic Packaging Rule Code Validation Form (RTVALGR) is to

- a. link fund categories to funds.
- b. create a packaging group.
- c. **define rule codes to be used in future rules forms.**
- d. award funds to students.
- e. link rules to packaging groups.

## Question 2

Which form allows you to link a Fund Category to a particular fund?

- a. **Fund Base Data Form.**
- b. Packaging Rules Form.
- c. Fund Category Validation Form.
- d. Packaging Group Fund Rules Form.
- e. Algorithmic Packaging Rules Code Validation Form.

### Question 3

Which form must be completed before utilizing the Algorithmic Packaging Rules Form (RTVALGR)?

- a. Fund Base Data Form.
- b. Packaging Rules Form.
- c. Fund Category Validation Form.
- d. Packaging Group Fund Rules Form.
- e. Algorithmic Packaging Rules Code Validation Form.**

### Question 4

The Packaging Group Fund Rules Form establishes fund-specific rules for your packaging group.

**True**

### Question 5

You can use one rule for multiple funds.

**True**

# Day-to-Day Operations



## Section goal

The goal of this section is to provide you with the knowledge and practice to handle online and batch packaging at your institution. The contents of the Day-to-Day section are applicable both for algorithmic packaging and packaging.

## Objectives

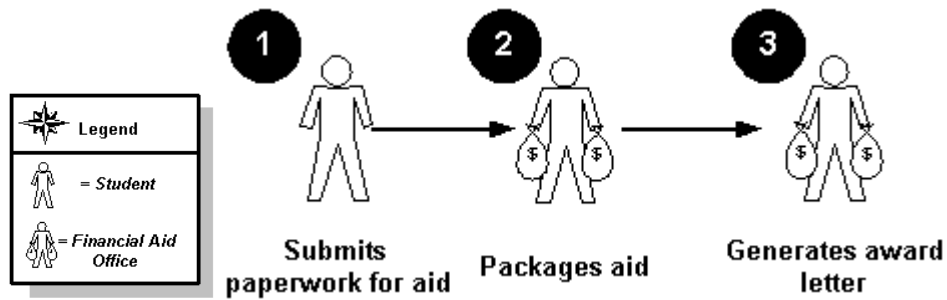
In this section you will learn how to

- enter and maintain resource information
- assign a student to a packaging group either automatically online, manually, or in batch
- award a student's funds based on rules, in batch or automatically online
- manually award additional funds following automatic packaging to meet any remaining unmet need
- send award letters
- award, accept, and decline/cancel funds manually and through mass entry.

# Process Introduction

## Flow diagram

This diagram highlights the process used to package funds.



## What happens

The stages of the process are described in this table.

Stage	Description
1	Student submits paperwork for aid.
2	Financial aid office packages aid.
3	Financial aid office generates award letter to send to student.

# Assigning a Student Manually to a Packaging Group

## Purpose

Once all the packaging options and packaging groups have been defined, you are ready to assign packaging groups to your students. If you are manually assigning a student to a packaging group, it is important to remember that the rules that were created to place a student into a packaging group will not be referenced for this procedure because you are overriding Banner to group a student manually.

You will use the Award Form Maintenance Form (RPAAWRD) to manually assign the students to a packaging group. The Award Maintenance Forms – Package Maintenance Form (RPAAPMT) and Financial Aid Record Maintenance Form (ROARMAN) -- can also be used in assigning a packaging group to a student manually.

## Banner form

The screenshot shows the Banner Award Maintenance (RPAAWRD) form. At the top, the title bar reads "Award Maintenance - RPAAWRD 8.0 (BAN8)". Below the title bar, there are fields for "Aid Year" (0809), "ID" (ALLEN), and a student name field (Mr. Matthew A Allen, Jr.).

The main content area is divided into two sections. The top section is titled "Fund Awards" and contains a table with columns for "Fund", "Description", "Status", "Offered", "Accepted", "Declined or Cancelled", "Memoed or Authorized", "Paid", and "Reschedule". The "Offered" through "Paid" columns contain numerical input fields, and the "Reschedule" column contains checkboxes. A "Total:" row is at the bottom of the table.

The bottom section is titled "Packaging Group" and contains several fields and checkboxes. The fields include "Group:", "Additional Stafford:" (Default), "Borrower Based:", "Dependency:", "Preparatory or Teacher Certification:" (N=No), "Award Letter", "Pell Origination", "Post Bachelor's Degree Pell Override", "HPPA", "Package Date:", "Subsidized Loan Exclusion Amount:", "Packaging Lock", "Information Access" (checked), and "Group Lock".

## Steps

Follow these steps to assign packaging groups to students.

Note: The student must have a budget assigned in order for any awards to be packaged.

1. Access the Award Form (RPAAWRD).
2. Select an aid year code in the **Aid Year** field, if needed.
3. Enter the ID of a financial aid student in the **ID** field.
4. Perform a **Next Block** function.
5. Select the **Packaging Group** tab at the bottom of the window.
6. Select the previously created group (FRSHXX) in the **Group** field.
7. Move to the **Fund** field on the Fund Awards block.
8. Select **Automatic Packaging** from the **Options** menu.

Result: Banner will now attempt to package this student with the funds you attached to this packaging group on the Packaging Group Fund Rules Form (RPRGFND). All funds in the packaging group will be validated prior to being awarded.

9. Review the funds awarded to the student.
10. Select the **Summary** tab to view the updated unmet need based on the packaging process.
11. Click the **Save** icon.
12. Click the **Exit** icon.



## Disbursement Schedule tab

The **Disbursement Schedule** tab displays disbursement dates of the awards for the term you select.

The screenshot shows the 'Award Maintenance RPAAWRD 8.0 (BAN8)' application window. At the top, there are fields for 'Aid Year' (0809), 'ID' (ALLEN), and a name field (Mr. Matthew A Allen, Jr.). Below these are three tabs: 'Award Maintenance', 'Fund Awards by Term', and 'Disbursement Schedule' (which is selected). The main area contains a table with the following columns: Fund, Term Code, Schedule Date, Schedule Percent, Schedule Amount, Disbursement Amount, Transaction Number, Disbursement Date, Load, and Enrollment Option. The table has 12 rows, with the last row containing a 'Total:' label. Below the table are fields for 'Fund Total:', 'Calculated Pell', 'Disbursement Amount:', 'Alternate Pell' (checkbox), 'Load:', and 'Enrollment Option:'. The 'Load' and 'Enrollment Option' fields are currently set to '(None)'.

## Steps

Follow these steps to view fund awards by the disbursement schedule.

Note: The student must have a budget assigned in order for any awards to be packaged.

1. Access the **Disbursement Schedule** tab.
2. Select a term in the **Term Code** field.
3. Click the **Save** icon
4. Click the **Exit** icon.

# Assigning a Student Online to a Packaging Group

## Purpose

Banner can also assign a student to a packaging group based on the rules that have been created.

You will use the Applicant Immediate Process Form (ROAIMMP) to assign the students to a packaging group online.

## Banner form

Applicant Immediate Process ROAIMMP 8.0 (BANS)

Aid Year: 0809 ID: ALLEN Mr. Matthew A Allen, Jr.

	Action Indicator	Term	Current Status	Completion Date
Tracking Group Assignment:	(None)			
Budgeting Group Assignment:	(None)			
Packaging Group Assignment:	(None)			
	<input type="checkbox"/> SAP	Calculated From:		
		Effective:		
Packaging Fund Assignment:	(None)			
Need Analysis Calculation:	(None)			
	<input type="checkbox"/> Immediate Pell Calculation			
	<input type="checkbox"/> Disbursement Date Update			
	<input type="checkbox"/> Authorize or Disburse Available Aid			

Letter Generation

Letter Code: [ ]

Term Code: [ ]

Wait Days: [ ]

Initial Code: [ ]

## Steps

Follow these steps to assign a student to a packaging group online.

1. Access the Applicant Immediate Process Form (ROAIMMP).
2. Verify or select an aid year code in the **Aid Year** field.
3. Enter the ID of a financial aid student in the **ID** field.
4. Perform a **Next Block** function.
5. Select the Action Indicator option for an **Immediate Process** in the **Packaging Group Assignment** field.
6. Select the correct term in the **Term** field.
7. Click the **Save** icon.

Note: The packaging group to which the student has been assigned is listed on the Auto Help line.

8. Click the **Exit** icon.
9. Access the Award Form (RPAAWRD).
10. Perform a **Next Block** function.
11. Select **Assign Packaging Group** from the **Options** menu.

Result: Banner will now package this student using the fund order set up on RPRGFND for the packaging group.

Note: The student must have a budget assigned in order for any awards to be packaged.

12. Click the **Save** icon.
13. Click the **Exit** icon.

Note: You can also perform automatic packaging from the ROAIMMP Form by choosing the **Immediate** option of **Packaging Fund Assignment**.

# Running the Packaging Process

## Purpose

Packaging can be run in either batch or online mode. The Packaging Process Form (RPEPCKG) may perform packaging in either option, and can be limited by specific identifiers such as individuals, packaging group codes, and populations.

## Banner form

The screenshot shows the 'Process Submission Controls' window for 'GJAPCTL 8.0 (s10b80)'. The 'Process' is set to 'RPEPCKG' and the 'Parameter Set' is empty. The 'Printer Control' section includes a 'Printer' dropdown, 'Special Print' field, 'Lines' set to 55, and 'Submit Time' field. The 'Parameter Values' section is a table with 8 rows. The 'Values' column is scrollable, showing values like 9394, B, A, FINAID, JOHNW, and FAISUSR. The 'Submission' section has a 'Save Parameter Set as' checkbox, 'Name' and 'Description' fields, and 'Hold' and 'Submit' radio buttons.

Number	Parameters	Values
01	Aid Year	9394
02	Process Indicator	B
03	Action Indicator	A
04	Applicant ID	
05	Packaging Group Code	
06	Application Code	FINAID
07	Selection ID	JOHNW
08	Creator ID	FAISUSR

LENGTH: 30 TYPE: Character O/R: Optional M/S: Single  
The ID of the person creating the sub-population rules.

## Steps

Follow these steps to submit a Banner job or report.

1. Access the Packaging Process Form (RPEPCKG).
2. If you want the output to appear on the screen, enter *Database* in the **Printer** field. If you want the output printed out, select the printer.
3. Perform a **Next Block** function until you access the Parameter Values block.

4. Add the values as follows:

<b>Number</b>	<b>Parameters</b>	<b>Action</b>
01	Aid Year Code	Enter Aid Year code
02	Process Indicator	Enter (O)nline or (B)atch Packaging
03	Action Indicator	Enter (A)ctual or (S)imulated Packaging
04	Applicant ID	Enter ID of student to be packaged individually online (Optional.)
05	Packaging Group Code	Enter the Packaging Group Code (Optional; if blank, will package all groups. Multiple Packaging Group Code lines may be inserted.)
06	Application Code	Enter the general area for which the selection ID was defined (Optional; used for population selections.)
07	Selection ID	Enter the name of the population selection utilized (Optional; used for population selections.)
08	Creator ID	Identify the person creating the sub-population rules (Optional; used for population selections.)
09	User ID	Enter the ID of the person using the sub-population rules (Optional; used for population selections.)
10	Ignore Package Complete Date	Enter (Y)es or (N)o
11	Print Report	Enter (A)ward Detail Listing, (F)und Summary or (B)oth (Optional.)
12	Ignore Tracking Requirements	Enter (Y)es or (N)o
13	Award Exhausted Fund Option	Enter (Y)es or (N)o
14	Calculate Pell Award	Enter (Y)es or (N)o

5. Perform the **Next Block** function to access the Submission block.
6. Click the **Submit** radio button.
7. Click the **Save** icon.
8. Click the **Exit** icon.

# Creating and Maintaining Funds

## Purpose

The Manage Funds Form (ROAMGMT) uses the basic segments of the Funds Management module to provide you with a convenient means to create, update, and monitor financial aid fund activity.

## Banner form

Fund	Available Offer	Current Offer	Accepted	Remaining
A1	3,210.00			19,500.00
ABLOAN	.00			.00
ABTEST	50,000.00	544.00	544.00	49,456.00
ACG	79,632.00	45,275.00	45,275.00	10,034,725.00
ACG2	10,000,000.00	7,650.00	7,650.00	9,992,350.00
ACGJPH	.00			.00
ALTLN	500,000.00	65,975.00	40,100.00	434,025.00
ANNALN	.00			.00
AS_SCH	.00			.00
BXS F1	.00			.00
BXS F4	.00			.00
CASSS	400,000.00	500.00	500.00	399,500.00
CASTEG	500,000.00	1,000.00	1,000.00	499,000.00
CASTEU	800,000.00	1,400.00	1,400.00	798,600.00
<b>Totals:</b>	7,728,666,628.61	4,730,546.50	4,511,165.50	8,285,635,700.52

## Step 1

Follow these steps to assign monies to a fund.

1. Access the Manage Funds Form (ROAMGMT).
2. Verify or select an aid year code in the **Aid Year** field.
3. Leave the **Sources** button selected to display the view options for Federal State, Institutional and Other. Otherwise, select the **Types** button to display the view options for Grants, Loans, Work and Scholarships.
4. Click the **Custom Display** button to add up to four additional columns, if desired.

5. Select the appropriate **Source** or **Type** tab.
6. Perform a **Next Block** function.
7. Select **Next Record** to scroll through the funds.
8. Select the **Create Fund** button to assign monies to a fund.
9. Identify the fund code in the **Fund** field.
10. Enter a brief description in the **Short Description** field.
11. Select the **Detail Code Active** box, if applicable.
12. Enter the appropriate **Fund Source**.
13. Enter the appropriate **Fund Type**.
14. Ensure that the **Fund Active** check box is selected.
15. Click the **Save** icon.

## Step 2

Follow these steps to manage a fund.

1. Access the Manage Funds Form (ROAMGMT).
2. Verify or select an aid year code in the **Aid Year** field.
3. Leave the **Sources** button selected to display the view options for Federal State, Institutional and Other. Otherwise, select the **Types** button to display the view options for Grants, Loans, Work and Scholarships.
4. Click the **Custom Display** button to add up to four additional columns, if desired.
5. Select the appropriate **Source** or **Type** tab.
6. Select **Next Record** to scroll through the funds.
7. Select **Maintain** to assign monies to a fund.
8. Make any appropriate changes to the funds.
9. Click the **Save** icon.
10. Click the **Exit** icon.



## Steps

Follow these steps to award a fund manually.

1. Access the Award Maintenance Form (RPAAWRD).
2. Verify or select an aid year code in the **Aid Year** field.
3. Enter the ID of a student in the **ID** field.
4. Click in the **Fund** field.

Note: Note the funds previously awarded to the student.

5. Perform an **Insert Record** function.
6. Use the List of Values to choose an additional fund to award this student in this packaging group.
7. Click in the **Status** field and use the List of Values to select an Award Status that means 'Accepted'.
8. Enter the amount of the award in the **Offered** field.
9. Enter an amount in the **Accepted** field.

Note: An accepted amount cannot be entered unless the award is in an Accepted status. Also, the **System** field will display an M for manual award.

10. Continue these steps to award a variety of funds until you have completed the student's package.
11. Click the **Save** icon when you have completed your additions.
12. Choose the **Packaging Group** tab.
13. The **Award Letter** field should be selected.

Note: If it is not, click in the **Award Letter** check box in the **Packaging Group** tab. Select this for the Population Selection process to identify the student in order to send him or her an award letter.

14. Click the **Save** icon.
15. Click the **Exit** icon.

# Modifying an Award Amount of an Existing Package

## Purpose

You can also use the Award Maintenance Form (RPAAWRD) to modify an award amount of an existing package.

Example: A student has come into your office with a request to reduce the amount of loan that he/she was awarded.

Note: These same functions can be performed on the Package Maintenance Form (RPAAPMT).

## Banner form

Package Maintenance RPAAPMT 8.0 (BAN8)

Aid Year: 0809 ID: ALLEN Mr. Matthew A Allen, Jr.

Award Maintenance Fund Awards by Term Disbursement Schedule

Fund: Status: Status Date: Expiration Date: Lock: System: Overrides

Original Offer:	Amount	Date
Offered:		
Accepted:		
Declined:		
Cancelled:		
Memoed:		
Authorized:		
Paid:		

Unmet Need: Replace EFC: Tracking Requirement: Federal Limit: Fund Limit: Fund Award Rule: Year in College: No Pell:

Summary Packaging Group

Budget: Resource: Offered: Group: Pell EFC: Aid Period: FM: IM: Subsidized Loan Exclusion Amount: EFC: Gross Need: Unmet Need:

## Step 1

Follow these steps to modify an award amount.

1. Access the Award Maintenance Form (RPAAWRD).
2. Verify or select an aid year code in the **Aid Year** field.
3. Enter the ID of a student in the **ID** field who exists in Banner.
4. Click on the fund in the Fund Awards block that the student wishes to have reduced.
5. Click in the **Accepted** field for that fund and enter the amount the student wishes to accept.
6. Click on the **Save** icon.

Note: The **Declined** or **Cancelled** field is now populated with the difference between the offered amount and the accepted amount.

## Step 2

Follow these steps to have this loan for only the first semester per the student's request.

1. Access the Award Form (RPAAWRD).

Note: All the following functions can be performed on the Package Maintenance (RPAAPMT) and Award Maintenance (ROARMAN) forms.

2. Verify or select the aid year code in the **Aid Year** field.
3. Enter the ID of a student in the **ID** field.
4. Click on the **Fund Awards by Term** tab to navigate to the Fund Awards by Term block.
5. Navigate to the fund term the student wishes to have for one semester only.
6. Move to the **Percent** field and enter 100%.
7. Move to the second term and enter 0% in its **Percent** field.
8. Click the **Save** icon.

Result: The **Offered** and **Accepted** fields for the first term are for the full amount and the **Offered** and **Accepted** amounts for the second term are placed at \$0.00. This also can be done by changing the offered and accepted amounts from the full award amount in the first term and 0 award amount in the second term. The percentages will change accordingly

Warning: You never should change the percentages and amounts at the same time.

## Step 3

Follow these steps to increase an existing award.

1. Access the Award Form (RPAAWRD).

Note: All the following functions can be performed on the Package Maintenance (RPAAPMT) and Award Maintenance (ROARMAN) forms.

2. Verify or select an aid year code in the **Aid Year** field.
3. Enter the ID of a student in the **ID** field.
4. Click on the **Fund Awards by Term** tab to navigate to the Fund Awards by Term block.
5. Navigate to the fund term the student wishes to package an increase.
6. Move to the first terms offered amount and enter an increase to the terms award in both the offered and accepted amounts (if accepted).
7. Click the **Save** icon.

The following information window will appear:

Notice Sum of award term amounts does not equal total. Do you want to repackage the award with the new total? Press Yes or No (No will cause all attempted term changes to be rolled back).

Result: you now have the choice to accept the new award or roll back to the original award, upon accepting the new award the awards block will be updated with the new total award amount.

Warning: you never should change the percentages and amounts at the same time.

8. Click the **Exit** icon.

# Inputting Outside Resources

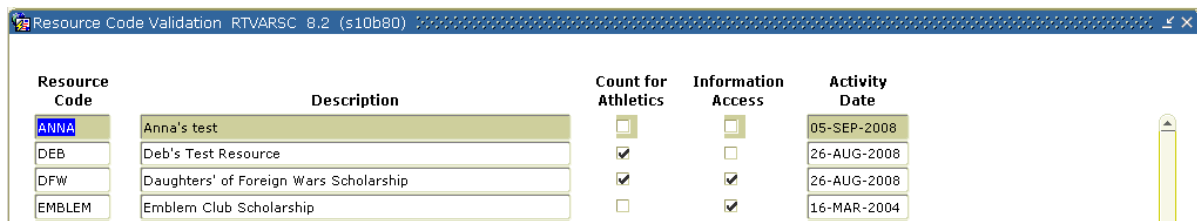
## Purpose

The Resource Code Validation Form (RTVARSC) is used by the financial aid office or business office to define resources.

Example: Your school receives notification of an outside scholarship that has been awarded to ten of your students. The scholarship agency awards the scholarship to the students directly. Your organization has chosen to treat these types of scholarships as resources.

Note: Default Resource codes only need to be set up once.

## Banner form



Resource Code	Description	Count for Athletics	Information Access	Activity Date
ANNA	Anna's test	<input type="checkbox"/>	<input type="checkbox"/>	05-SEP-2008
DEB	Deb's Test Resource	<input checked="" type="checkbox"/>	<input type="checkbox"/>	26-AUG-2008
DFW	Daughters' of Foreign Wars Scholarship	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	26-AUG-2008
EMBLEM	Emblem Club Scholarship	<input type="checkbox"/>	<input checked="" type="checkbox"/>	16-MAR-2004

## Steps

Follow these steps to define a resource code.

1. Access the Resource Code Validation Form (RTVARSC).
2. Enter a new resource code (from 1 to 6 alphanumeric characters) in the **Resource Code** field.
3. Enter a definition of your new resource code in the **Description** field.
4. Click on the **Save** icon.
5. Click the **Exit** icon.

## Banner form

Resource Maintenance RPAARSC 8.0 (BANB)

Aid Year: 0809 ID: ALLEN Mr. Matthew A Allen, Jr.

Other Resources				Amounts	
Resource:				Estimated:	
Term:		Type: <input type="radio"/>	Number: <input type="text"/>	Actual:	
Resource:				Estimated:	
Term:		Type: <input type="checkbox"/>	Number: <input type="text"/>	Actual:	
Resource:				Estimated:	
Term:		Type: <input type="checkbox"/>	Number: <input type="text"/>	Actual:	
Resource:				Estimated:	
Term:		Type: <input type="checkbox"/>	Number: <input type="text"/>	Actual:	
Resource:				Estimated:	
Term:		Type: <input type="checkbox"/>	Number: <input type="text"/>	Actual:	
Other Resources Calculated Total:					

Summary

Budget:  EFC:  Resources:

Gross Need:  Offered:  Unmet Need:

## Steps

Follow these steps to assign a resource.

1. Access the Resource Maintenance Form (RPAARSC).
2. Verify or select an aid year code in the **Aid Year** field.
3. Select the ID number of a student in the **ID** field.
4. Perform a **Next Block** function to move to the Other Resources block.
5. Enter the code previously created in the **Resource** field.

Note: You can use the **Search** icon to search for the resource code created on RTVARSC.

Result: The description is now populated.

6. Select an appropriate term for the aid year and the term for which the student received the scholarship in the **Term** field.

7. Enter the amount in the **Estimated** field and/or the **Actual** field.
8. Click on the **Save** icon.
9. Click on the **Exit** icon.
10. Review the results on the Award Form (RPAAWRD) in the **Resource** field of the **Summary** tab.

Note: This process can be done also through the Award Maintenance (ROARMAN) form.

# Preparing Mass Accept Awards

## Purpose

The Award Acceptance Mass Entry Form (RPAMACC) enables you to enter a large number of applicant award acceptances or rejections or to accept the students' entire package with one record.

Example: Your institution does not automatically accept loan or work funds when they are awarded; it sends award letters to students permitting them to accept or decline them. You want to mass process all the letters that students have returned to the financial aid office.

## Banner form

Student ID	Student Name	Accept Award	Fund	Accepted Amount
		<input checked="" type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		

## Step

Follow these steps to accept or reject a loan or fund.

1. Access the Award Acceptance Mass Entry Form (RPAMACC).
2. Verify or select an aid year code in the **Aid Year** field.
3. Select the **Student ID** of a student who has been offered a loan or work fund.
4. The **Accept Award** check box should be populated.
5. Enter a loan or work fund in the **Fund** field.

Note: The fund should have an original Award Status of *Offered*.

6. Click in the **Accepted Amount** field and enter the amount the student has accepted if it is different than the amount awarded.

Note: If the student accepts the full award, you do not need to enter an amount in this field; the full amount of the award will be accepted. If the student accepts the entire package you need not enter a fund code just the accept award flag, it will then accept all award that the student has that are offered.

7. Click on the **Save** icon.
8. Click on the **Exit** icon.
9. Access the Award Form (RPAAWRD).
10. Verify or select an aid year code in the **Aid Year** field.
11. Select the **ID** of the student whose award you previously accepted on the Award Acceptance Mass Entry Form (RPAMACC).
12. Perform a **Next Block** function.

Note: The fund status has been changed from offered to accepted.

13. Click the **Exit** icon.
14. Access the Award Acceptance Mass Entry Form (RPAMACC).
15. Verify or select an aid year code in the **Aid Year** field.
16. Select the ID number in the **ID** field of a student who has been awarded a loan or work fund.
17. Remove the **Accept Award** flag.
18. Enter a loan or work fund in the **Fund Code** field.
19. Click on the **Save** icon.
20. Click on the **Exit** icon.
21. Access the Award Form (RPAAWRD).
22. Verify or select an aid year code in the **Aid Year** field.
23. Select the ID in the **ID** field of the student in the previous steps.
24. Perform a **Next Block** function.

Note: The student's fund status has been changed from offered to declined.

# Additional Practice

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## Steps

Using a student who has not yet been packaged, place the student into a packaging group. First, you will manually enter a fund and amount and then you will auto package the student.

1. Access the Award Form (RPAAWRD).

Note: the same functions can be performed on the RPAAPMT and ROARMAN forms.

2. Enter the ID number of your student in the **ID** field.
3. Perform a **Next Block** function.
4. Select the **Packaging Group** tab.
5. Double-click in the **Group** field and select a packaging group from the Packaging Group Validation Form (RTVPGRP).

Note: The **Packaging Date** field enables you to maintain the packaging date for a student. The packaging program (RPEPCKG) will automatically generate this date when performed either online or in batch. Records that have the packaging date populated will not re-package if RPEPCKG is re-run in batch. Manually entering funds for a student will not generate a packaging date.

6. Click the **Save** icon.
7. Perform a **Next Block** function.
8. Double-click in the **Fund** field and select a fund.
9. Double-click in the **Status** field and select a Status code.

10. Enter an offer amount in the **Offered** field.

Note: You can optionally use the **Override** field to override any error conditions that you encounter when accepting/rejecting an award. **No** is the default. When you override error messages that apply to the student, the **Yes** option overrides the most recent error and the **All** option overrides all five error conditions:

- Exceeds Unmet Need.
- Outstanding Requirements.
- Exceeds EFC.
- Violates Fed Fund ID limits.
- Violates Fund Min/Max.

11. Select the **Award Letter** check box whenever the offered amount changes on any fund in the student's package and you want the changes to the fund to generate a new award letter (see *Section B Set up, Packaging Options and Fund Options*).

Note: Students in need of a new or revised award letter must have a check manually placed in this field.

12. Click the **Save** icon.

Note: Notice the Packaging Date in the Packaging Group block. This date will not populate when funds are entered manually. It is populated only after RPEPKG is run.

13. Select **Assign Packaging Group** from the **Options** menu.

14. Review the award package.

Note: Notice the Packaging Date in the Packaging Group block is now populated.

15. Click the **Exit** icon.

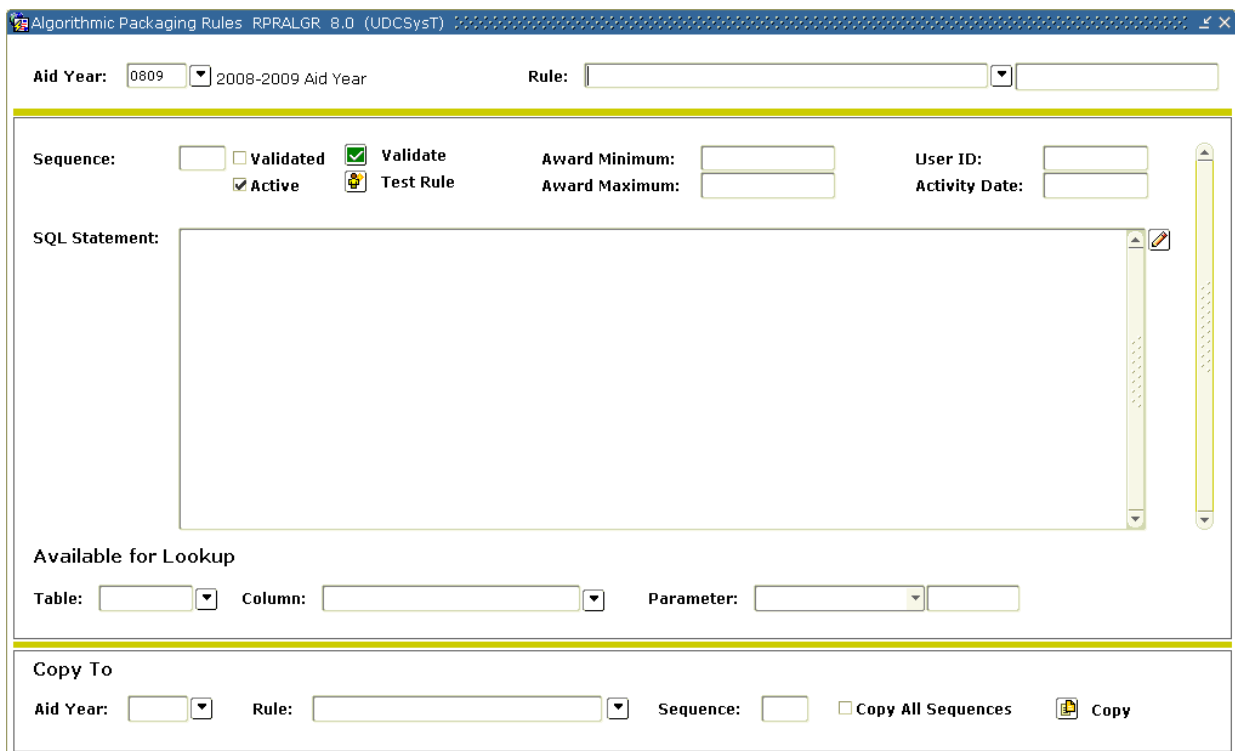
# Entering Algorithmic Packaging Parameters

## Purpose

Use the Algorithmic Packaging Rules Form (RPRALGR) to use algorithmic packaging rules to award funds. On this form, you write SQL statements to define algorithmic packaging rules, which are arranged by rule code and sequence number.

This form allows the use of user-defined functions.

## Banner form



The screenshot shows the 'Algorithmic Packaging Rules RPRALGR 8.0 (UDCSysT)' window. At the top, there are dropdown menus for 'Aid Year' (set to 0809) and 'Rule'. Below this is a section for rule configuration with checkboxes for 'Validated', 'Active', 'Validate', and 'Test Rule', and input fields for 'Award Minimum', 'Award Maximum', 'User ID', and 'Activity Date'. A large text area labeled 'SQL Statement' is provided for defining the rule. Below the SQL area is an 'Available for Lookup' section with dropdowns for 'Table', 'Column', and 'Parameter'. At the bottom, a 'Copy To' section includes dropdowns for 'Aid Year', 'Rule', and 'Sequence', along with a 'Copy All Sequences' checkbox and a 'Copy' button.

## Steps

Follow these steps to create algorithmic packaging rules.

1. Access the Algorithmic Packaging Rules Form (RPRALGR).
2. Enter a year in the **Aid Year** field.
3. Select a Rule code associated with the algorithmic packaging rule in the **Rule** field.
4. Perform a **Next Block** function.
5. Enter an Algorithmic packaging rule sequence number in the **Sequence** field.
6. Enter a minimum award amount for this rule in the **Award Minimum** field.
7. Enter a maximum award amount for this rule in the **Award Maximum** field.
8. Enter (or copy from an editor) a SQL statement to define the algorithmic packaging rule in the **SQL Statement** field.

Note: The select statement for the SQL Statement must return a numeric value. Non-numeric results will return an error.

9. Use the **Available for Lookup** section as a reference for valid tables, table columns, and parameters.
10. Use the **Copy To** block to copy a rule from one aid year, rule, and sequence combination to another aid year, rule, and sequence combination.

Note: In order to access this window, there must be a valid set of rule criteria in the Rule Block.

11. Click the **Save** icon.
12. Click the **Exit** icon.

## Validating algorithmic packaging parameters

Save all changes before you select the **Validate** button. When you click the **Validate** button, the SQL statement is parsed. This function ensures that the SQL statement is valid. If the SQL statement is valid, the process checks the **Validated** field; if the SQL statement is invalid, an error message is returned.

### Steps

Follow these steps to validate the SQL statement.

1. Click the **Validate** button.
  - If the statement is valid, the **Validated** field will be selected.
  - If the statement is not valid, you will see an Error Message.

## Testing algorithmic packaging parameters

When you click the **Test Rule** button, the system accesses a window where you may enter values for any substitution parameters used in the rule and execute the rule in test mode. This allows you to verify that the rule will return the expected results when used by the Packaging Process.

### Steps

Follow these steps to test the SQL statement.

1. Click the **Test Rule** button.
2. Enter values to use as substitution parameters.
3. Review the results of the test.

## Sample Algorithmic Packaging Rules

Listed below are examples of rules that can be set up in the **SQL Statement** field on the Algorithmic Packaging Rules Form (RPRALGR). For detailed code supporting these examples, refer to the *Banner Financial Aid 8.0 Release Guide*.

- Institutional Grant with Amounts Based on GPA and IM EFC Ranges
- SEOG Award Calculation Based on Pell Award Amounts for the Year
- SEOG Award Calculation Based on Pell Award Amounts for the Year while using Baseline Database Functions
- SEOG Award Calculation Based on Pell Award Amounts for the Year while using Multiple Pell Fund Codes
- SEOG Award Calculation Based on Pell Award Amounts for the Year while using Multiple Pell Fund Codes and while using Baseline Database Functions
- Calculating Perkins Loans as a Percentage of Pell
- Calculation for a State Fund which has a Range of Offer Amounts Based on a Percentage of Need and Various Ranges of Cost of Attendance and EFC
- Calculation for a State Fund which has a Range of Offer Amounts Based on EFC and Whether a Student is In-State or Out-of-State
- Calculate an Equity Packaging Amount Based on Both Gross Need and Budget.





# Self Check

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## Directions

Use the information you have learned in this workbook to complete this self-check activity.

## Question 1

The **Assign Packaging Group** option on the Award Form (RPAAWRD) creates an award package for the selected student based upon the institution's

- a. budgeting rules.
- b. tracking rules.
- c. satisfactory academic rules.
- d. packaging rules.
- e. fund disbursement rules.

## Question 2

The **Package Date** field on RPAAWRD populates

- a. when the students are packaged using the batch or online RPEPCKG process.
- b. when the date is manually entered.
- c. when a RORRULE is written to do so.
- d. each time you access the RPAAWRD Form.
- e. each time you manually award a fund to a student.

### Question 3

When you manually assign a student to a packaging group the previous rules that have been created for packaging groups will not be referenced.

True or False

### Question 4

When you assign a packaging group to a student after you save the record on the Applicant Immediate Process Form (ROAIMMP)

- a. the **Action Indicator** field will indicate which packaging group the student has been assigned.
- b. the **Current Status** field will indicate which packaging group the student has been assigned.
- c. the **Auto Help** line will indicate which packaging group the student has been assigned.
- d. you must go to the Award Form (RPAAWRD) to see which packaging group the student has been assigned.

### Question 5

The funds that are already awarded to the student can be viewed

- a. on the **Summary** tab on the Award Form (RPAAWRD).
- b. in the **Status** field in the **Fund Awards** window on the Award Form (RPAAWRD).
- c. in the **Awards Block** on the RPAAWRD, RPAAPMT and ROARMAN forms.
- d. on the Applicant Budget Form (RBAABUD).
- e. on the Applicant Immediate Process (ROAIMMP).

## Question 6

If any awards have been manually added for a student, the **System** field will display

- a. an *S*.
- b. an *X*.
- c. an *A*.
- d. an *M*.
- e. nothing in this field.

## Question 7

You can determine how much a student was originally awarded on RPAAPMT by

- a. the **Memo'd/Authorized** field.
- b. the **Paid** field.
- c. the **Original Offered** field.
- d. subtracting the **Declined/Cancelled** field from the **Accepted** field.
- e. guessing the amount.

## Question 8

To designate half of an award for the fall and half for the spring, you would go to the **Fund Awards by Term** tab (RPAAWRD), to the **Accepted** field and input 50% of the award amount, and then go to the second term and input 50% of the award amount in its **Accepted** field.

True or False

## Question 9

On the Award Form (RPAAWRD) outside resources for a student are viewed in the

- a. **Summary** tab in the **Resource** field.
- b. **Packaging Group** tab in the **Resource** field.
- c. **Fund Awards by Term** tab in the **Resource** field.
- d. **Enrollment** window in the **Resource** field.
- e. **Disbursement Schedule** tab in the **Resource** field.

## Question 10

The initial status of the fund when you are populating the **Fund Code** field on Award Acceptance Mass Entry Form (RPAMACC) should be

- a. *Accepted.*
- b. *Cancelled.*
- c. *Paid.*
- d. *Offered.*
- e. *Declined.*

# Answer Key for Self Check

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## Question 1

The **Assign Packaging Group** option on the Award Form (RPAAWRD) creates an award package for the selected student based upon the institution's

- a. budgeting rules.
- b. tracking rules.
- c. satisfactory academic rules.
- d. packaging rules.**
- e. fund disbursement rules.

## Question 2

The **Package Date** field on RPAAWRD populates

- a. when the students are packaged using the batch or online RPEPCKG process.**
- b. when the date is manually entered.
- c. when a RORRULE is written to do so.
- d. each time you access the RPAAWRD Form.
- e. each time you manually award a fund to a student.

## Question 3

When you manually assign a student to a packaging group the previous rules that have been created for packaging groups will not be referenced

**True**

## Question 4

When you assign a packaging group to a student after you save the record on the Applicant Immediate Process Form (ROAIMMP)

- a. the **Action Indicator** field will indicate which packaging group the student has been assigned.
- b. the **Current Status** field will indicate which packaging group the student has been assigned.
- c. **the Auto Help line will indicate which packaging group the student has been assigned.**
- d. you must go to the Award Form (RPAAWRD) to see which packaging group the student has been assigned.

## Question 5

The funds that are already awarded to the student can be viewed

- a. on the **Summary** tab on the Award Form (RPAAWRD).
- b. in the **Status** field in the **Fund Awards** window on the Award Form (RPAAWRD).
- c. **in the Awards Block on the RPAAWRD, RPAAPMT and ROARMAN forms.**
- d. on the Applicant Budget Form (RBAABUD).
- e. on the Applicant Immediate Process (ROAIMMP).

## Question 6

If any awards have been manually added for a student, the **System** field will display

- a. an *S*.
- b. an *X*.
- c. an *A*.
- d. **an *M*.**
- e. nothing in this field.

## Question 7

You can determine how much a student was originally awarded on RPAAPMT by

- a. the **Memo'd/Authorized** field.
- b. the **Paid** field.
- c. **the Original Offered field** .
- d. subtracting the **Declined/Cancelled** field from the **Accepted** field.
- e. guessing the amount.

## Question 8

To designate half of an award for the fall and half for the spring, you would go to the **Fund Awards by Term** tab (RPAAWRD), to the **Accepted** field and input 50% of the award amount, and then go to the second term and input 50% of the award amount in its **Accepted** field.

**True**

## Question 9

On the Award Form (RPAAWRD) outside resources for a student are viewed in the

- a. **Summary tab in the Resource field.**
- b. **Packaging Group** tab in the **Resource** field.
- c. **Fund Awards by Term** tab in the **Resource** field.
- d. **Enrollment** window in the **Resource** field.
- e. **Disbursement Schedule** tab in the **Resource** field.

## Question 10

The initial status of the fund when you are populating the **Fund Code** field on Award Acceptance Mass Entry Form (RPAMACC) should be

- a. *Accepted.*
- b. *Cancelled.*
- c. *Paid.*
- d. ***Offered.***
- e. *Declined.*

# Appendix



## Forms Job Aid

Form	Full Name	Use this Form to...
RFRBASE	Fund Base Data Form	link a fund category to a particular fund.
ROAIMMP	Applicant Immediate Process	assign students online.
ROAMGMT	Manage Funds For	create, update, and monitor financial aid fund activity.
ROARMAN	Award Maintenance	assign a packaging group to a student manually.
ROISARI	SAR ID Inquiry	query a student's Banner System ID based on the entry of the student's SAR ID.
RORRULE	Financial Aid Selection Rules	perform a variety of functions based on the rule type.
RPAAPMT	Package Maintenance	assign a packaging group to a student manually.
RPAARSC	Resource	enter other resources for an applicant (resources other than contract and exemption resources which are defined in Banner Student) for each aid year and term.
RPAAWRD	Record Maintenance	assign a packaging group to a student manually.
RPAMACC	Award Acceptance Mass Entry	enter a large number of applicant award acceptance or rejections or to accept the students entire package with one record.

<b>Form</b>	<b>Full Name</b>	<b>Use this Form to...</b>
RPEPCKG	Packaging Process	perform packaging in either batch or online mode.
RPIFAWD	Fund Award Inquiry	view all students who have a particular fund for a particular aid year.
RPIFTRM	Fund Award Term Inquiry	view all students with a particular fund for a particular term.
RPRALGR	Algorithmic Packaging Rules	use algorithmic packaging rules to award funds.
RPRDEFR	Default Packaging Rules	set default limits and specifications for gap, equity, and self-help packaging for Financial Aid award packaging.
RPRFCAT	Packaging Group Fund Category Maximums Rules	place fund category maximums on packaging groups.
RPRGFND	Packaging Group Fund Rules	establish fund-specific rules for your packaging group.
RPROPTS	Packaging Options	select options that control how certain functions in Financial Aid perform.
RPRPCKR	Packaging Rules	automate GAP, equity, or self-help packaging strategies based on packaging groups.
RTVALGR	Algorithmic Packaging Rule Code Validation	define algorithmic packaging rule codes for use on the Algorithmic Packaging Rules Form (RPRALGR), Packaging Rules Form (RPRPCKR) and Packaging Group Fund Rules Form (RPRGFND).
RTVARSC	Resource Code Validation	define resources.

<b>Form</b>	<b>Full Name</b>	<b>Use this Form to...</b>
RTVFCAT	Fund Category Validation	define fund categories for use on the Fund Base Data Form (RFRBASE) and Packaging Group Fund Category Maximums Rules Form (RPRFCAT).
RTVPGRP	Packaging Group Validation	create packaging groups and establish the priority rules for the group assignment and fund awarding processes.

# Terminology

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## Algorithmic packaging

Creation of a set of ordered rules or steps by users for the automatic packaging of financial aid funds. The rules or steps allow the use of mathematical expressions as part of the awarding rules and logic for a particular fund within a packaging group based upon data elements within the student and/or financial aid system.

## Award

A financial aid package.

## Packaging group

A population of students with similar characteristics.