

Banner Financial Aid Budgeting Training Workbook

Release 8.3 - January 2009

Updated 1/7/2009



SUNGARD HIGHER EDUCATION

What can we help you achieve?

SunGard Higher Education
4 Country View Road
Malvern, Pennsylvania 19355
United States of America
(800) 522 - 4827

Customer Support Center website
<http://connect.sungardhe.com>

Distribution Services e-mail address
distserv@sungardhe.com

Other services

In preparing and providing this publication, SunGard Higher Education is not rendering legal, accounting, or other similar professional services. SunGard Higher Education makes no claims that an institution's use of this publication or the software for which it is provided will insure compliance with applicable federal or state laws, rules, or regulations. Each organization should seek legal, accounting and other similar professional services from competent providers of the organization's own choosing.

Trademark

Without limitation, SunGard, the SunGard logo, Banner, Campus Pipeline, Luminis, PowerCAMPUS, Matrix, and Plus are trademarks or registered trademarks of SunGard Data Systems Inc. or its subsidiaries in the U.S. and other countries. Third-party names and marks referenced herein are trademarks or registered trademarks of their respective owners.

Revision History Log

Publication Date	Summary
4/30/2008	New version that supports Banner 8 software.
1/7/2009	Updated version that supports Banner 8.3 software.

Notice of rights

Copyright © SunGard Higher Education 2005-9. This document is proprietary and confidential information of SunGard Higher Education Inc. and is not to be copied, reproduced, lent, displayed or distributed, nor used for any purpose other than that for which it is specifically provided without the express written permission of SunGard Higher Education Inc.



Think before you print.

Table of Contents

- Introduction 4**
 - Process Introduction..... 5

- Setup 6**
 - Overview 6
 - Aid Period Validation Form 8
 - Aid Period/Term Rules Form.....10
 - Budget Component Validation Form.....12
 - Budget Type Validation Form14
 - Budget Group Validation Form.....16
 - Financial Aid Selection Rules Form.....18
 - Budget Group/Type Rules Form.....20
 - Budget Component Rules Form22
 - Comment Category Code Validation Form24
 - Message Code Validation Form.....25
 - Message Rules Form.....27
 - Self Check.....28
 - Answer Key for Self Check30

- Day-to-day Operations 31**
 - Overview31
 - Process Introduction.....32
 - Assigning a Budget with the Create Budget Function33
 - Assigning a Budget with On-Line Immediate Processing.....35
 - Assigning Budgets with the Batch Grouping Process37
 - Adding Budget Components, Locking a Budget Group.....41
 - Changing a Budget Group and Aid Period.....43
 - Entering Mixed Enrollment Budgets47
 - Self Check.....49
 - Answer Key for Self Check52

- Appendix..... 54**
 - Forms Job Aid54

Introduction



Course goal

The goal of this workbook is to provide you with the knowledge and practice to accurately calculate and assign cost of attendance values to applicants based on budget types using the various functions in the Banner Budgeting module. This workbook is divided into three sections:

1. Introduction
2. Set Up
3. Day-to-day operations

Intended audience

Financial Aid office administrators and staff

Prerequisites

To complete this course, you should have

- completed the Education Practices 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.

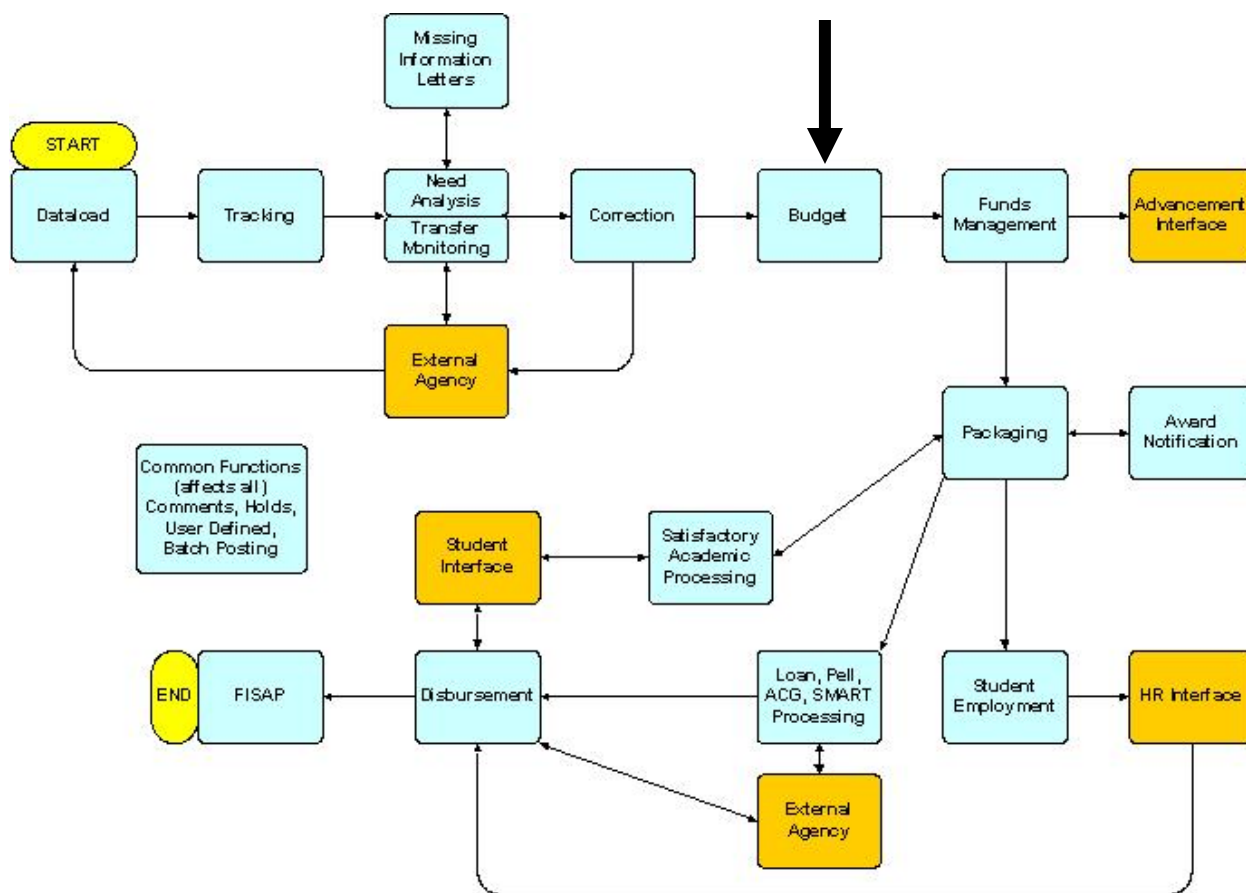
Process Introduction

Introduction

Applicant budgets reflect the approximate costs that an applicant is expected to incur while attending the institution. These costs are different for different categories of students; for example, on-campus versus off-campus, graduate versus undergraduate. An individual applicant can have at most two different budgets, one for Pell Grants and a second for non-Pell programs.

Flow diagram

This diagram highlights where the budgeting process occurs within the overall Financial Aid process.



Setup



Overview

Introduction

The Budgeting module calculates and assigns cost of attendance values to each applicant based on budget components in effect at the institution (e.g., tuition, fees, room and board, etc.) This module provides these features:

- Budget Component Assignment – assigns a pre-defined set of budget categories (components) and values to students according to their budget group.
- Mixed Enrollment – creates a budget that is a weighted average of two or more budgets. This is useful for a student who is on-campus for half a year and off-campus for the other half.
- Multiple Budgets – based on user-defined rules, a student can be assigned a Pell budget plus one additional budget.
- Transaction Log – maintains an online log of all budget and budget group changes.

Objectives

At the end of this section, you will be able to

- create budget components, component amounts, budget groups, and budget types
- define aid periods
- establish valid budget types by budget groups
- establish valid budget components by budget groups, budget type, and aid period combinations
- define budget group assignment rules for each budget group established.

Aid Period Validation Form

Purpose

The Aid Period Validation Form (RTVAPRD) is used to maintain valid aid periods, descriptions of each period, percent of full academic year costs assigned for budgets for this aid period, the percentage of the student's annual Pell award that may be awarded for this aid period, the Expected Family Contribution (EFC) percentage for the period, and the activity date of the maintenance.

Banner form

Code	Description	Budget Full Year Percent	Pell Full Year Percent	EFC Percent	Activity Date
12MNTH	summer-fall-spring-summer	133.333	100	133.333	14-JUN-1999
1TERM	12 mon in 1 term for UND	133.333	100	133.333	18-SEP-1998
3TERM	3 term aid period for testing	133.333	100	126	18-AUG-2005
4TERM	4TERMS	133.33	100	133.333	09-JUL-1999
5TERM	Angel's 5 term test	133.33	100	133.33	08-MAY-2002
APCK	Summer semester	25	25	25	08-MAR-2002
BROCK	fall-spring	101	100	100	28-MAR-2003
DRT	Test for Dartmouth	66.666	66.666	66.666	26-JAN-2006
F/S	Fall-spring Quarters	66.666	66.666	66.666	07-JUL-1999
F/W	Fall-winter Quarters	66.666	66.666	66.666	21-AUG-1991
FALL	Fall Quarter	33.333	33.333	33.333	21-SEP-1990
FALL-S	Fall Semester	50	50	50	21-MAR-2003
FALLS	Fall Semester - No Spring	50	50	50	12-JAN-2001
FASPSU	Fall 10 Spring 20 Summer 30	99.999	100	100	25-MAR-2004
FSPSU	Fall Spring Summer	133	100	133	01-JUN-1999
FULL	Full Academic Year	100	100	100	25-MAR-2004
FULL2	Full year - 2 disb./per term	100.001	100	100	04-NOV-2002
FUN	summer	25	25	25	28-MAR-2003
FWS	Fall Winter Spring Quarters	75	75	75	21-NOV-2002
FWSSU	Fa 01 Wi 02 Sp 03 Su 04	133.333	100	133.333	17-APR-2003
GLOP	TEST	99.999	100	99.999	23-JAN-2003

Steps

Follow the steps to create a cost of attendance budget for each of the various groups of students who attend your institution.

1. Access the Aid Period Validation Form (RTVAPRD).
2. Perform an **Insert Record** function.
3. Enter a unique aid period code in the **Code** field.

Note: Maximum of six characters.

Example: You can enter FA/SPR, which indicates an aid period of fall-spring semesters.

4. Enter a brief description of your aid period in the **Description** field.
5. Enter the percentage of the aid year that this aid period represents in the **Full Year Percent** field.

Example: Fall Only = 50% or Fall/Spring = 100%.

Note: Banner only allows one aid period in this column to equal 100 percent. All other aid periods must be a variation of 100 percent, either higher or lower. Enter 99.999 percent when an additional aid period should equal 100 percent.

6. Enter the percentage of the annual scheduled Pell Grant that a student may be awarded for this aid period in the **Pell Full Year Percent** field.

Note: Each percentage entered may not exceed 100 percent, but you may have more than one entry of 100 percent in this column.

7. Enter the percentage of the effective family contribution (EFC) calculation that you wish to associate with this aid period in the **EFC Percent** field.

Note: This field is used only when the **Use EFC Proration** box on ROAUSIO is checked.

8. Click the **Save** icon.
9. Click the **Exit** icon.

Aid Period/Term Rules Form

Purpose

The Aid Period/Term Rules Form (RORTPRD) enables you to specify the terms that you want to associate with an aid period. In addition to defining aid periods, the form must also be built to define the valid terms within aid periods. These terms have been defined on the Term Validation Form (STVTERM). This form appears in the Common Functions Control Menu.

Banner form

The screenshot shows a web browser window titled "Aid Period/Term Rules RORTPRD 8.0 (BAN8)". The form contains the following elements:

- Aid Year:** A dropdown menu with "0708" selected.
- Aid Period:** A dropdown menu.
- Aid Period Base Information:**
 - EFC Percent:** A text input field.
 - EFC Proration:** A small text input field.
 - Percentage of Full-Year:** A text input field.
 - Pell Percentage of Full-Year:** A text input field.
- Aid Period/Term Code Rules:** A table with the following columns: Term Code, Term Description, Start Date, End Date, and Activity Date. The table has 12 rows, each with input fields for the data.

Steps

Follow the steps to create a cost of attendance budget for each of the various groups of students who attend your institution.

1. Access the Aid Period/Term Rules Form (RORTPRD).
2. Enter the code in the **Aid Year** field for the aid year for which you are specifying terms or select it from the LOV.
3. Enter the aid period in the **Aid Period** field for which you are specifying terms or select it from the LOV.

Note: For practice, enter or select the aid period you defined in the last exercise.

4. Perform a **Next Block** function.
5. Enter the first term code in the **Term Code** field that you want to associate with this aid period or select it from the LOV.
6. Repeat for each term that should be associated with the aid period.

Example: The Fall/Spring aid period needs a Fall term code and a Spring term code.

7. Click the **Save** icon.
8. Click the **Exit** icon.

Budget Component Validation Form

Purpose

The Budget Component Validation Form (RTVCOMP) enables you to define and maintain standard budget component codes. These budget component codes represent items that you frequently encounter when you estimate a student's cost of education (cost of attendance).

Banner form

Component Code	Description	Default	Print Order	Used for Alt Pell	Used for <1/2 Pell	Activity Date
SRW	test comp	<input type="checkbox"/>	2	<input type="checkbox"/>	<input type="checkbox"/>	05-MAY-2003
SRW1	Test component	<input type="checkbox"/>	5	<input type="checkbox"/>	<input type="checkbox"/>	13-AUG-1997
CK	Chris' component	<input checked="" type="checkbox"/>	6	<input type="checkbox"/>	<input type="checkbox"/>	28-APR-2004
T+F	Tuition & Fees	<input checked="" type="checkbox"/>	10	<input type="checkbox"/>	<input type="checkbox"/>	16-JUN-2004
TUIT	Tuition	<input type="checkbox"/>	15	<input type="checkbox"/>	<input type="checkbox"/>	28-JUN-1990
PELL	General Allowance	<input type="checkbox"/>	20	<input type="checkbox"/>	<input type="checkbox"/>	12-SEP-1991
R+B	Room & Board	<input checked="" type="checkbox"/>	20	<input type="checkbox"/>	<input type="checkbox"/>	21-AUG-1991
B+S	Books & Supplies	<input checked="" type="checkbox"/>	30	<input type="checkbox"/>	<input type="checkbox"/>	16-JUN-2004
FEES	Fees	<input type="checkbox"/>	40	<input type="checkbox"/>	<input type="checkbox"/>	28-OCT-1998
PERS	Personal Expenses	<input checked="" type="checkbox"/>	50	<input type="checkbox"/>	<input type="checkbox"/>	25-JUN-1990
TRAN	Transportation	<input checked="" type="checkbox"/>	60	<input type="checkbox"/>	<input type="checkbox"/>	01-MAY-1990
O/S	Non-res Fee	<input type="checkbox"/>	65	<input type="checkbox"/>	<input type="checkbox"/>	12-SEP-1991
CHLD	Child Care Expenses	<input type="checkbox"/>	70	<input type="checkbox"/>	<input type="checkbox"/>	01-MAY-1990
T+F	Tuition & Fees	<input type="checkbox"/>	110	<input type="checkbox"/>	<input type="checkbox"/>	21-AUG-1991
,R+B	Room & Board	<input type="checkbox"/>	120	<input type="checkbox"/>	<input type="checkbox"/>	21-AUG-1991
-B+S	Books & Supplies	<input type="checkbox"/>	130	<input type="checkbox"/>	<input type="checkbox"/>	21-AUG-1991
.PER	Personal Expenses	<input type="checkbox"/>	140	<input type="checkbox"/>	<input type="checkbox"/>	01-FEB-1991
_TRN	Transportation	<input type="checkbox"/>	150	<input type="checkbox"/>	<input type="checkbox"/>	01-FEB-1991
OFEE	Other Fees	<input type="checkbox"/>	160	<input type="checkbox"/>	<input type="checkbox"/>	26-DEC-2001
GK	GK's component du jour	<input type="checkbox"/>	161	<input type="checkbox"/>	<input type="checkbox"/>	07-MAR-2008
LTHT	Less Than Half-Time Component	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	07-MAR-2008

Steps

Follow the steps to build standard components to be used in constructing cost of attendance budgets.

1. Access the Budget Component Validation Form (RTVCOMP).
2. Enter a unique code in the **Component Code** field.
3. Enter a brief description for the new component in the **Description** field.
4. Click the **Default** checkbox if you want the system to automatically copy the component into each budget that you define.
5. Enter a numerical value (1- 999) in the **Print Order** field to establish the print order.
6. Click the **Used for <1/2 Pell** checkbox for each component to be used to calculate a less-than-half-time Pell Grant budget automatically for the student.

Result: When the **Used for <1/2 Pell** field is checked, Banner sums the total of those components that are in the student's assigned Pell budget. The calculated <1/2 Pell budget total for the student displays on the Applicant Pell Grant Form (ROAPELL).

7. Click the **Save** icon.
8. Click the **Exit** icon.

(Note: Alternate Pell is no longer authorized by the U.S. Department of Education)

Budget Type Validation Form

Purpose

The Budget Type Validation Form (RTVBTYPE) enables you to define and maintain standard budget type codes.

Banner form

Type Code	Description	Default						Activity Date
		EFC	Campus	Pell	Institutional	State	Other	
CAMP	Campus-based	F	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	21-AUG-1991
CGK	Chris' code	F	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	18-NOV-2004
HANK	hank	F	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12-DEC-2002
INST	Institutional	I	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	09-AUG-1990
JACK	test	F	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15-JUL-2004
OTHR	Other	I	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	24-SEP-1990
PELL	Pell-based	F	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12-DEC-2002
STAT	State	F	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	25-JUN-1990
		<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	
		<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"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Steps

Follow the steps to establish standard budget type codes.

1. Access the Budget Type Validation Form (RTVBTYP).
2. Enter a budget type code in the **Type Code** field.
3. Enter a brief description of the code in the **Description** field.
4. Enter the appropriate effective family contribution (EFC) code in the **Default EFC** field.
 - If the EFC is federal methodology, enter *F*.
 - If the EFC is institutional methodology, enter *I*.
 - Click the appropriate checkbox for the budget type.

Note: Institutional Methodology schools must create one budget with the Institutional field checked.

5. Click the **Save** icon.
6. Click the **Exit** icon.

Budget Group Validation Form

Purpose

The Budget Group Validation Form (RTVBGRP) enables you to create and maintain standard budget group codes. These budgeting groups allow you to categorize students with similar budgeting considerations into the same designated groups.

Banner form

Group Code	Group Description	Priority	Group Active	Activity Date
NEWGRP	New Group	2	<input checked="" type="checkbox"/>	13-NOV-2003
UGINON	Ungrad Resident On-campus	2	<input checked="" type="checkbox"/>	09-FEB-2006
UGONIM	Undergrad On-campus IM	2	<input checked="" type="checkbox"/>	14-APR-2003
UGINOF	Ungrad Resident Off-campus	10	<input checked="" type="checkbox"/>	19-APR-1999
UGINHM	Ungrad Resident At-home	15	<input checked="" type="checkbox"/>	19-APR-1999
UGOSON	Ungrad Non-resident On-campus	20	<input checked="" type="checkbox"/>	19-APR-1999
UGOSOF	Ungrad Non-resident Off-campus	25	<input checked="" type="checkbox"/>	19-APR-1999
TOMMY	Jackie's test 4/18/03	29	<input checked="" type="checkbox"/>	05-MAR-2008
UGOSHM	Ungrad Non-resident At-home	30	<input checked="" type="checkbox"/>	19-APR-1999
GRINON	Grad Resident On-campus	35	<input type="checkbox"/>	17-JAN-2008
GRINOF	Grad Resident Off-campus	40	<input checked="" type="checkbox"/>	19-APR-1999
GRINHM	Grad Resident At-home	45	<input checked="" type="checkbox"/>	19-APR-1999
GROSON	Grad Non-resident On-campus	50	<input checked="" type="checkbox"/>	19-APR-1999
GROSOF	Grad Non-resident Off-campus	55	<input checked="" type="checkbox"/>	19-APR-1999
GROSHM	Grad Non-resident At-home	60	<input checked="" type="checkbox"/>	19-APR-1999
SAMPLE	Alpha Comp List	70	<input checked="" type="checkbox"/>	19-APR-1999
HSTEST	HS Test Group	75	<input checked="" type="checkbox"/>	03-MAR-2003
CARY	cart	100	<input checked="" type="checkbox"/>	18-NOV-2004
KEEMA	keema	100	<input checked="" type="checkbox"/>	15-JUL-2004
TEST	Test	100	<input type="checkbox"/>	17-JAN-2008
SUE1	Sue Test group	101	<input checked="" type="checkbox"/>	25-MAR-2004

Steps

Follow the steps to establish standard budget group codes.

1. Access the Budget Group Validation Form (RTVBGRP).
2. Enter a budget group code in the **Group Code** field.
3. Enter a brief description of the budget group code in the **Group Description** field.
4. Enter a numerical value (1-999999) as the budget group priority in the **Priority** field.
5. Click in the **Group Active** field if you want to determine the record active.
6. Click the **Save** icon.
7. Click the **Exit** icon.

Financial Aid Selection Rules Form

Purpose

The Financial Aid Selection Rules Form (RORRULE) enables you to write rules for group selection, fund management, and satisfactory academic progress based on the rule type that you enter.

Banner form

Financial Aid Selection Rules RORRULE 8.0 (BAN8)

Rule Type: T=Requirements Tracking Group
Aid Year: 0708 2007-2008 Aid Year
Group Code: EF FEMALE Active
Fund Code:

Selection Criteria

'(' Table Name Column Name Operator Value ')' AND/OR

RCRAPP1_TITLE = '2'

Copy To Rule Active

Steps

Follow these steps to write a budget grouping rule.

1. Access the Financial Aid Selection Rules Form (RORRULE).
2. Select *Budget Group Assignment* from the drop-down menu in the **Rule Type** field.
3. Enter the code in the **Aid Year** field for the aid year you are defining or select it from the list of values (LOV).

4. Enter the group code in the **Group Code** field you defined in the Budget Group/Type Rules Form procedure or select it from the LOV.

Note: Do not enter a fund code.

5. Perform a **Next Block** function.
6. Enter one of the selection criteria below to define your budget group.

Sample rules:

Undergraduate Living with Parents:

- (RCRAPP1_YR_IN_COLL BETWEEN '1' AND '5' OR
- RCRAPP1_YR_IN_COLL IS NULL) AND
- (RCRAPP1_INST_HOUS_CDE = '1' OR
- RCRAPP1_INST_HOUS_CDE IS NULL) AND
- RCRAPP1_CURR_REC_IND = 'Y'

OR

Graduate Living in an Apartment:

- RCRAPP1_YR_IN_COLL IN ('6','7','8','9','0') AND
- RCRAPP1_INST_HOUS_CDE = '3' AND
- RCRAPP1_CURR_REC_IND = 'Y'

7. Click the **Save** icon.
8. Click the **Exit** icon.

Steps

Follow these steps to complete the process.

1. Access the Budget Group/Type Rules Form (RBRGTYP).
2. Enter the budget group code in the **Group Code** field that you defined in the Budget Type Validation Form procedure.
3. Enter the budget type code in the **Type** field that you defined in the Budget Type Validation Form procedure or select it from the LOV.
4. Enter *Y* or *N* in the **Default** field to indicate whether this is the primary budget type that you use for calculating need.

Note: Only one budget type can be defined as the default. For Institutional Methodology schools, the Institutional budget must be the Default budget.

5. Click the **Save** icon.
6. Click the **Exit** icon.

4. Enter the type code in the **Type Code** field you defined in the Budget Type Validation Form procedure or select it from the LOV.
5. Enter the period code in the **Period Code** field you defined in the Aid Period Validation Form.
6. Perform a **Next Block** function.

Result: This inserts components with the default field checked on RTVCOMP.

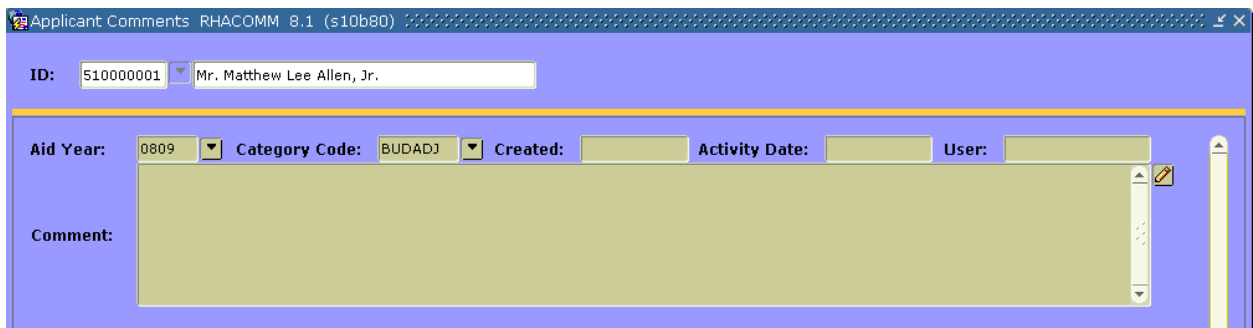
7. Enter the budgeted monetary amount in the **Amount** field for the component code.
8. Click the **Save** icon.
9. Complete the fields in the Copy To block to copy existing budget data to another group/aid period/type as needed.
10. Click the **Exit** icon.

Comment Category Code Validation Form

Purpose

The new Comment Category Validation Form (RTVCCOM) allows you to define category codes that can be used for comments entered on the Applicant Comments Form (RHACOMM).

Banner Form



Steps

Follow these steps to define category codes for comments.

1. Access the Comment Category Validation Form (RTVCCOM).
2. Enter the code in the **Category Code** field or applicant comments.
3. Enter the description of the comment category code in the **Description** field.
4. Click the **Save** icon.

Message Code Validation Form

Purpose

The Message Code Validation Form (RTVMESG) permits the maintenance of message-related codes and text. This form is found on the Common Functions Control Menu.

Warning: When creating message text DO NOT use double quotes " ", or other characters in the text. Miscellaneous characters within the text create problems with the Letter Generation process and printing of letters.

Banner form

Message Code Validation RTVMESG 8.0 (BAN8)

Message Code: FLSU Info Access: Activity Date: 09-JUN-2004

Text

For the Fall Semester, you have \$x of eligibility for Federal Direct Student Loan

Message Code: GLOF Info Access: Activity Date: 02-APR-2003

Text

Your budget was determined based on being a graduate in-state student residing off-campus. If this is incorrect, please notify the Financial Aid Office at once.

Steps

Follow these steps to create a budget group message.

1. Access the Message Code Validation Form (RTVMESG).
2. Perform an **Insert Record** function.
3. Enter a code in the **Message Code** field for the new message.

Note: For practice, create a message code for the budget group defined.

4. Enter the free-form text message in the **Text** field.
5. The Info Access box is not enabled for budget group messages.
6. Click the **Save** icon.
7. Click the **Exit** icon.

Message Rules Form

Purpose

The Message Rules Form (RORMESG) enables you to associate budget message codes with a budget group. This allows you to print explanatory messages on letters to further describe the student's budget.

Banner form

Message Rules RORMESG 8.0 (BAN8)

Aid Year: 0708 Type: Budgeting Code: UGINON Ungrad Resident On-campus

Message Code	Message Description	Activity Date
UJON	Your budget was determined based on being an in-state student and residing on-campus. If this information is incorrect,	17-OCT-2006

Steps

Follow these steps to associate a budget code and message to a budget group.

1. Access the Message Rules Form (RORMESG).
2. Enter code for the aid year in the **Aid Year** field or select it from the LOV.
3. Select *Budgeting* in the **Type** field.
4. Enter the budget group code in the **Code** field to which you want to add the message or select it from the LOV.
5. Enter the code in the **Message Code** field for the message that you created in the Message Code Validation Form (RTVMESG) procedure.

Note: This message can be associated with this budget group on any letter to a student. However, budget messages are not displayed on Self Service.

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

Once you have established an aid period on the Aid Period Validation Form (RTVAPRD), you will then complete the

- a. Aid Period/Terms Rules Form (RORTPRD).
- b. U.S. Specific Institution Financial Aid Options Form (ROAUSIO).
- c. Financial Aid Term Code Inquiry Form (ROITERM).
- d. Aid Year Inquiry Form (ROIADY).
- e. Budget Component Validation Form (RTVCOMP).

Question 2

You will establish budgeting group selection criteria on the

- a. Budget Component Rules Form (RBRCOMP).
- b. Financial Aid Selection Rules Form (RORRULE).
- c. Budget Group Validation Form (RTVBGRP).
- d. U.S. Specific Institution Financial Aid Options Form (ROAUSIO).
- e. Budget Component Validation Form (RTVCOMP).

Question 3

You will associate a message with a budget group on the

- a. Message Code Validation Form (RTVMESG).
- b. Applicant Comments Form (RHACOMM)
- c. Message Rules Form (RORMESG).
- d. Budget Group/Type Rules Form (RBRGTYP).
- e. Budget Group Validation Form (RTVBGRP).

Question 4

The final step for putting all of the *pieces* of a budget together is on the

- a. Budget Component Rules Form (RBRCOMP).
- b. Budget Group Validation Form (RTVBGRP).
- c. Budget Component Validation Form (RTVCOMP).
- d. Budget Type Validation Form (RTVBTYP).
- e. Budget Group/Type Rules Form (RBRGTYP).

Question 5

Click the default checkbox on the RTVCOMP for each component you want to display automatically when creating budgets on the RBRCOMP form.

True or False

Answer Key for Self Check

Question 1

Once you have established an aid period on the Aid Period Validation Form (RTVAPRD), you will then complete the

Aid Period/Terms Rules Form (RORTPRD).

Question 2

You will establish budgeting group selection criteria on the

Financial Aid Selection Rules Form (RORRULE).

Question 3

You will associate a message with a budget group on the

Message Rules Form (RORMESG).

Question 4

The final step for putting all of the *pieces* of a budget together is on the

a) **Budget Component Rules Form (RBRCOMP).**

Question 5

Click the default checkbox on the RTVCOMP for each component you want to display automatically when creating budgets on the RBRCOMP form.

True

Day-to-day Operations

0



Overview

Introduction

The purpose of this section is to explain the day-to-day or operational procedures to handle applicant budgeting at your institution.

Objectives

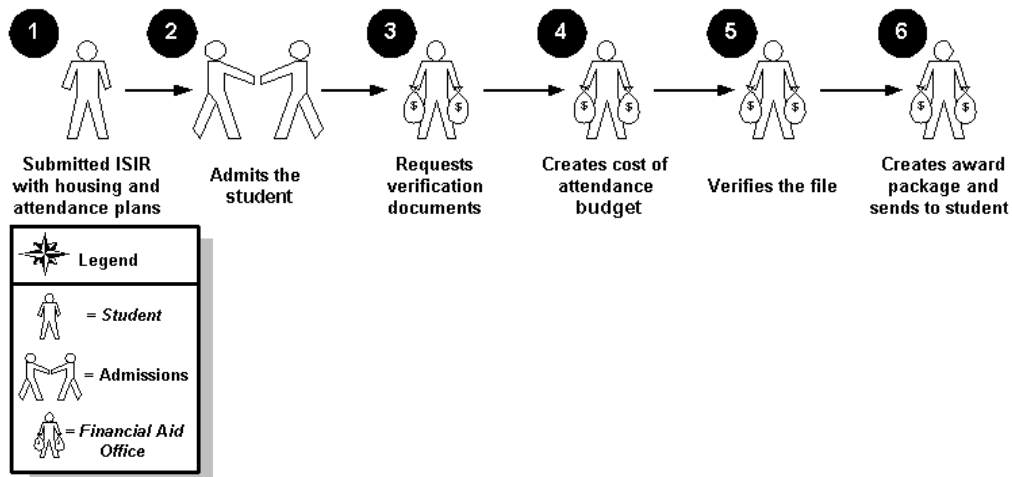
At the end of this section, you will be able to

- place a student in a budget group
- change a student's budget group to reflect mixed enrollment
- determine whether components were system generated, manually assigned, or generated as a result of mixed enrollment.

Process Introduction

Flow diagram

This diagram highlights the processes used to assign budgets and modify budget amounts.



What happens

The stages of the process are described in this table.

Stage	Description
1	Student submits an ISIR to the college with housing preferences and attendance plans.
2	Admissions admits student to the institution.
3	FAO requests verification documents from the student, if required.
4	FAO creates a cost of attendance budget.
5	FAO verifies the file, if required.
6	FAO creates an award package to send to the student.

Assigning a Budget with the Create Budget Function

Purpose

The Applicant Budget Form (RBAABUD) enables you to assign a set of budget components to a financial aid applicant for a specified aid year. The form also allows you to assign a budget group to a student for a specific aid period. The aid period defines the portion of the aid year that the student will attend.

Banner form

The screenshot shows the Applicant Budget Form (RBAABUD) interface. At the top, there are fields for "Aid Year" (set to 0708) and "ID". Below this, there are tabs for "Applicant Budget" and "Mixed Enrollment". The form is divided into several sections:

- Budget Group and Period:** Includes fields for "Group", "Period", and "Percent of Full Year". There are also "Create Budget" and "Delete Budget" buttons.
- Budget Type:** Includes a "Type" dropdown, "EFC Method" checkbox, and "System Indicator" checkbox.
- Budget Components Table:** A table with columns for Code, Description, Budget Components Amount, Activity Date, User ID, and System Indicator. It contains several rows of input fields and a "Total:" row at the bottom.

Steps

Follow these steps to assign a budget group and budget components.

1. Access the Applicant Budget Form (RBAABUD).
2. Enter code in the **Aid Year** field for the aid year for which you are assigning budgets or select it from the LOV.
3. Enter the ID of a student you used in a previous exercise in the **ID** field.
4. Perform a **Next Block** function.
5. Enter the appropriate Budget Group in the **Group** field for your student or select it from the LOV.
6. Enter the fall/spring aid period in the **Period** field or select it from the LOV.
7. Click the **Create Budget** icon to insert the default components and associated dollar amounts.

Note: The default listed on RBRGTYP will be the budget type displayed when automatically creating the budget components.

8. Note the **System Indicator** field at the end of each budget component line.

Result: The **System Indicator** field will show:

- *M* when requirements are manually entered/updated.
- *S* when requirements are automatically entered/updated.
- *B* when requirements are assigned using the batch posting process
- *X* when mixed enrollment is being used.

Note: The Mixed Enrollment tab allows for instances where students have mixed enrollment.

Example: A student may be an undergraduate student for the fall term and a graduate student for the spring term. The Mixed Enrollment tab will allow you to enter the student in an undergraduate group for 50 percent and a graduate group for 50 percent.

9. Click the **Exit** icon.

Assigning a Budget with On-Line Immediate Processing

Purpose

The Applicant Immediate Process Form (ROAIMMP) is used to assign an applicant's budget.

Banner form

The screenshot shows a web browser window titled "Applicant Immediate Process ROAIMMP 8.0 (BAN8)". The form contains the following fields and sections:

- Aid Year:** 0708 (dropdown)
- ID:** ALLEN (dropdown) Mr. Matthew A Allen, Jr. (text)
- Action Indicator:** (None) (dropdown)
- Tracking Group Assignment:** (None) (dropdown)
- Budgeting Group Assignment:** (None) (dropdown)
- Packaging Group Assignment:** (None) (dropdown)
- SAP
- Packaging Fund Assignment:** (None) (dropdown)
- Need Analysis Calculation:** (None) (dropdown)
- Immediate Pell Calculation
- Disbursement Date Update
- Authorize or Disburse Available Aid
- Term:** (dropdown)
- Current Status:** (dropdown)
- Completion Date:** 18-MAR-2008 (text)
- Calculated From:** (dropdown)
- Effective:** (dropdown)
- Letter Generation:**
 - Letter Code:** (dropdown)
 - Term Code:** (dropdown)
 - Wait Days:** (text)
 - Initial Code:** (dropdown)

Steps

Follow the steps to complete the process.

1. Access the Applicant Budget Form (RBAABUD).
2. Enter code in the **Aid Year** field for the aid year for which you are assigning budgets or select it from the LOV.
3. Enter the ID of a different practice student in the **ID** field.
4. Perform a **Next Block** function.
5. Select **Assign Budget Group** from the **Options** menu.

Result: This will take you to the Immediate Process form (ROAIMMP).

6. Select **Immediate** from the drop-down menu in the **Action Indicator** column for the **Budgeting** field.
7. Click in the **Term Code** field to default the current term.
8. Click the **Save** icon.

Result: The grouping process executes the rules entered on RORRULE for budget groups. When it is finished, the results are displayed in the auto hint line.

9. Click the **Exit** icon.

Result: The system will exit ROAIMMP and return to RBAABUD.

10. Review budget data for the student on the RBAABUD form.

Assigning Budgets with the Batch Grouping Process

Purpose

The Automatic Group Assignment Process (RORGRPS) is used to assign a budget to groups of students.

For more explanatory information about the job parameters, see the *Banner Financial Aid User Manual*.

Banner form

The screenshot shows a web browser window titled "Process Submission Controls GJAPCTL 8.0 (BAN8)". The form is divided into several sections:

- Process:** A dropdown menu set to "RORGRPS" and a text field containing "Automatic Group Assignment".
- Parameter Set:** A dropdown menu.
- Printer Control:** Includes a "Printer:" dropdown, a "Special Print:" text field, "Lines:" with an input box, and "Submit Time:" with an input box.
- Parameter Values:** A table with two columns: "Number" and "Parameters". The "Parameters" column has a dropdown menu. The "Values" column has a dropdown menu. The table contains the following data:

Number	Parameters	Values
01	Aid Year Code	0506
02	Group Type Indicator	BTP
03	Term Code	200610
04	Process Indicator	B
05	Applicant ID	
06	Use All Applicants Indicator	Y
07	Application ID	
08	Selection ID	

Below the table, there is a note: "LENGTH: 4 TYPE: Character O/R: Required M/S: Single Valid/Active Aid Year Code".

- Submission:** Includes a checkbox for "Save Parameter Set as", a "Name:" text field, a "Description:" text field, a radio button for "Hold", and a radio button for "Submit".

Steps

Follow the steps to complete the process.

1. Access the Automatic Group Assignment Process form (RORGRPS).
2. Double-click in the **Printer** field and select *Database* from the Printer Validation Form (GTVPRNT).
3. Enter these values in the parameters indicated here.

Note: All characters must be entered in upper case.

Parameter	Description
Parameter 01: Aid Year Code	Enter <i>0809</i> (or practice aid year)
Parameter 02: Group Type Indicator	Enter a <i>B</i>
Parameter 03: Term Code	Enter a term from STVTERM for 0809
Parameter 04: Process Indicator	Enter a <i>B</i>
Parameter 05: Applicant Identifier	Leave this field blank for this exercise
Parameter 06: Use All Applicants Indicator	Enter a <i>Y</i>
Parameter 07: Application Code	Leave this field blank for this exercise
Parameter 08: Selection ID	Leave this field blank for this exercise
Parameter 09: Creator ID	Leave this field blank for this exercise
Parameter 10: User ID	Leave this field blank for this exercise

4. Click the **Save Parameter Set as** checkbox.
5. Leave the Name and Description fields blank for this exercise.
6. Click the **Save** icon.
7. View the Auto Hint line at the bottom of the form and note the sequence number assigned to the job.

8. Select **Review Output** on the **Options** menu.

Result: The Saved Output Review form will display and you will see the name of the job (RORGRPS) and the sequence number that you noted in the Hint line.

9. Double click in the **File Name** field.

Result: This will display a .log and a .lis file for the process.

10. Select the .log file.

Result: Information about how the job functioned is displayed.

11. Select the Rollback function to access the Key block of the Saved Output Review Form (GJIREVO).

12. Double click in the **File Name** field.

13. Select the .lis file.

14. Select **Show Document, Save File** or **Delete** from the **Options** menu.

Viewing results

You can also check the results of the process by looking at the Group Inquiry Form (ROIGRPI). This inquiry form displays the cumulative results from all executions of RORGRPS. With each run of the job, the numbers will increment according to the population processed.

Banner form

Group Inquiry ROIGRPI 8.0 (BA) **Next Block**

Aid Year: 0708 2007-2008 Aid Year Group Type: Budgeting

Term:

Code	Description	Group Active	Group Priority	Award Priority	Rules Exist	Rules Active	Information Access	Student Count	Activity Date
UGINON	Ungrad Resident On-campus	<input checked="" type="checkbox"/>	2		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10	09-FEB-2006
NEWGRP	New Group	<input checked="" type="checkbox"/>	2		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	13-NOV-2003
UGONIM	Undergrad On-campus IM	<input checked="" type="checkbox"/>	2		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	14-APR-2003
UGINOF	Ungrad Resident Off-campus	<input checked="" type="checkbox"/>	10		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	19-APR-1999
UGINHM	Ungrad Resident At-home	<input checked="" type="checkbox"/>	15		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	19-APR-1999
UGOSON	Ungrad Non-resident On-campus	<input checked="" type="checkbox"/>	20		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	19-APR-1999
UGOSOF	Ungrad Non-resident Off-campus	<input checked="" type="checkbox"/>	25		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	19-APR-1999
TOMMY	Jackie's test 4/18/03	<input checked="" type="checkbox"/>	29		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	05-MAR-2008
UGOSHM	Ungrad Non-resident At-home	<input checked="" type="checkbox"/>	30		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	19-APR-1999
GRINON	Grad Resident On-campus	<input type="checkbox"/>	35		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	17-JAN-2008
GRINOF	Grad Resident Off-campus	<input checked="" type="checkbox"/>	40		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	19-APR-1999
GRINHM	Grad Resident At-home	<input checked="" type="checkbox"/>	45		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	19-APR-1999
GROSON	Grad Non-resident On-campus	<input checked="" type="checkbox"/>	50		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	19-APR-1999
GROSOF	Grad Non-resident Off-campus	<input checked="" type="checkbox"/>	55		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	19-APR-1999
GROSHM	Grad Non-resident At-home	<input checked="" type="checkbox"/>	60		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	19-APR-1999
SAMPLE	Alpha Comp List	<input checked="" type="checkbox"/>	70		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	19-APR-1999

Student Count ==> Total: Query:

Steps

Follow these steps to view the Group Inquiry Form (ROIGRPI).

1. Access the Group Inquiry Form (ROIGRPI).
2. Verify the aid year information is correct.
3. Perform a **Next Block** function.

Result: The number of students associated with each group is displayed in the **Student Count** field.

Adding Budget Components, Locking a Budget Group

Purpose

The Applicant Budget Form (RBAABUD) is used to review the documentation, make manual changes on a case-by-case basis, and lock the budget group to prevent the budget from being changed during the batch grouping process.

Banner form

Applicant Budget: RBAABUD 8.0 (BANB)

Aid Year: 0708 ID: @00014309 Cayelan C Carey

Applicant Budget Mixed Enrollment

Budget Group and Period

Group: UGINON Ungrad Resident On-campus Percent of Full Year: 100
 Period: FULL Full Academic Year
 Group Lock Indicator

Budget Type

Type: CAMP Campus-based EFC Method: F System Indicator: S

Code	Description	Budget Components Amount	Activity Date	User ID	System Indicator
FEES	Fees	150	31-MAR-2008	FAISUSR	S
PERS	Personal Expenses	750	31-MAR-2008	FAISUSR	S
R+B	Room & Board	3,550	31-MAR-2008	FAISUSR	S
TRAN	Transportation	500	31-MAR-2008	FAISUSR	S
TUIT	Tuition	20,000	31-MAR-2008	FAISUSR	S
Total:		24,950			

Steps

Follow these steps to add budget components and lock a budget group.

1. Access the Applicant Budget Form (RBAABUD).
2. Enter the aid year in the **Aid Year** field for the aid year for which you are assigning budgets or select it from the LOV.
3. Enter an ID number of a student in the **ID** field.
4. Enter the budget component code in the **Code** field of a component you want to add or select one from the LOV.
5. Enter the monetary amount for this component in the **Budget Components Amount** field.
6. Click the **Save** icon.
7. Go to the **Budget Components Amount** field for another budget component and change the amount.
8. Click the **Group Lock Indicator** checkbox in the Group Data block.
9. Click the **Save** icon.
10. Access the Applicant Data Log Inquiry Form (ROIALOG) and review entries for your budget changes.
11. Click the **Exit** icon.

Changing a Budget Group and Aid Period

Purpose

The Applicant Budget Form (RBAABUD) is used to change a budget group and aid period.

Banner form

Applicant Budget: RBAABUD 8.0 (BAN8)

Aid Year: 0708 ID: @00014309 Cayelan C Carey

Applicant Budget Mixed Enrollment

Budget Group and Period

Group: UGINON Ungrad Resident On-campus
 Period: FULL Full Academic Year
 Group Lock Indicator

Percent of Full Year: 100

Budget Type

Type: CAMP Campus-based
 EFC Method: F
 System Indicator: S

Code	Description	Budget Components Amount	Activity Date	User ID	System Indicator
FEES	Fees	150	31-MAR-2008	FAISUSR	S
PERS	Personal Expenses	750	31-MAR-2008	FAISUSR	S
R+B	Room & Board	3,550	31-MAR-2008	FAISUSR	S
TRAN	Transportation	500	31-MAR-2008	FAISUSR	S
TUIT	Tuition	20,000	31-MAR-2008	FAISUSR	S
Total:		24,950			

Steps

Follow these steps to change a budget group and aid period.

1. Access the Applicant Budget Form (RBAABUD).
2. Enter the aid year in the **Aid Year** field.
3. Enter an ID number of a student in the **ID** field.
4. Select the appropriate budget group in the **Group** field.
5. Select the correct period in the **Period** field.
6. Click the **Create Budget** icon.

Result: This will default in the budget consistent with group and aid period from RBRCOMP.

7. Review the resulting change in EFC on ROASTAT and RNARSLT.

Note: The student and/or parent EFC will adjust automatically if you have the **Use EFC Proration** field checked on the ROAUSIO form. If you are not using EFC proration, enter the number of months of budget duration on the RNAOVxx form and click **Calculate Need** on the **Options** menu to adjust the EFC.

Purpose

The Applicant Comments Form (RHACOMM) is used to enter comments about an applicant's changes in his/her budget.

Example: When a budget is modified, you want to document the changes in Banner.

Banner form

The screenshot shows a web browser window titled "Applicant Comments RHACOMM 8.0 (BAN8)". The form contains the following elements:

- ID:** A text input field with a dropdown arrow on the left.
- Aid Year:** A dropdown menu.
- Category Code:** A dropdown menu.
- Created:** A text input field.
- Activity Date:** A text input field.
- User:** A text input field.
- Comment:** A large text area with a vertical scrollbar and a small edit icon on the right.

These three rows are repeated vertically, separated by horizontal lines.

Steps

Follow these steps to complete the process

1. Access the Applicant Comments Form (RHACOMM).
2. Enter an ID number of a student in the **ID** field.
3. Enter the aid year in the **Aid Year** field for the aid year or select it from the LOV.
4. Enter the category code created above for budget adjustments.
5. Enter a free-form text comment in the **Comment** fields for the budget adjustment.
6. Click the **Save** icon.
7. Click the **Exit** icon.

Entering Mixed Enrollment Budgets

Purpose

The Applicant Budget Form (RBAABUD) is used to make adjustments to the student cost of attendance.

Banner form

Applicant Budget RBAABUD 8.0 (BAN8)

Aid Year: 0708 ID: @00014309 Cayelan C Carey

Applicant Budget Mixed Enrollment

Code	Description	Percent
UGINON	Ungrad Resident On-campus	

Steps

Follow these steps to complete the process.

1. Access the Applicant Budget Form (RBAABUD).
2. Select an aid year in the **Aid Year** field.
3. Enter an ID number of the student in the **ID** field.
4. Perform a **Next Block** function.
5. Select the **Mixed Enrollment** tab.
6. Select a budget group code in the first **Code** field.
7. Enter the percentage of the student's enrollment in the **Percent** field of the

student's enrollment accounted for by this group.

8. Select another budget group code in the next **Code** field.
9. Enter the percentage of the student's enrollment in the **Percent** field of the student's enrollment accounted for by this group.

Note: The total percentage must equal 100.

10. Click the **Save** icon.

11. Perform an **Insert Record** function.

Result: The Applicant Budget tab is displayed. Notice that *X* is displayed in the **System Indicator** field for each mixed budget component in the **Budget Components** block.

12. 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 two fields that must be populated in the Budget Group/Period block of the Applicant Budget Form (RBAABUD) in order for Banner to calculate a budget for a student are the

- a. Group and Aid Period.
- b. Group and Term Code.
- c. Group and Prorate Indicator.
- d. Budget Type and Aid Period.
- e. Budget Group and Budget Type.

Question 2

A mixed budget exists if the indicator in the Sys/Man column is marked with a

- a. M.
- b. X.
- c. S.
- d. D.
- e. J.

Question 3

Below are three methods for creating a student budget on the Applicant Budget Form (RBAABUD).

1. Access the Group Data window, enter a budget group and aid period and click the Create Budget icon.
2. Access the ROAIMMP form and perform immediate on-line budget grouping.
3. Run the batch RORGRPS Batch Grouping process.

True or False

Question 4

The name of the form you will use to document changes to a student's budget is the

- a. Applicant Comments Form (RHACOMM).
- b. Applicant Budget Form (RBAABUD).
- c. Applicant Requirements Tracking Form (RRAAREQ).
- d. Message Code Validation Form (RTVMESG).
- e. Message Rules Form (RORMESG).

Question 5

You prevent the student's group and budget from changing during the batch grouping process by

- a. doing nothing because once a student is in a budget group, the grouping process cannot change the student's budget group.
- b. accessing the Mixed Budget window on the RBAABUD form and clicking the Group Lock checkbox.
- c. accessing the Group Data window on the RBAABUD form and clicking the Group Lock checkbox.
- d. accessing the Group Data window on the RBAABUD form and inserting a record.
- e. accessing the Group Data window on the RBAABUD form and saving the record.

Answer Key for Self Check

Question 1

The two fields that must be populated in the Budget Group/Period block of the Applicant Budget Form (RBAABUD) in order for Banner to calculate a budget for a student are the

a) Group and Aid Period.

Question 2

A mixed budget exists if the indicator in the Sys/Man column is marked with a

b) X.

Question 3

Below are three methods for creating a student budget on the Applicant Budget Form (RBAABUD).

True

Question 4

The name of the form you will use to document changes to a student's budget is the

a) Applicant Comments Form (RHACOMM).

Question 5

You prevent the student's group and budget from changing during the batch grouping process by

c) accessing the Group Data window on the RBAABUD form and clicking the **Group Lock** checkbox.

Appendix



Forms Job Aid

Form	Full Name	Use this Form to...
RTVAPRD	Aid Period Validation	Maintain valid aid periods, descriptions of each period, percent of full academic year costs assigned for budgets for this aid period, the percentage of the student's annual Pell award that may be awarded for this aid period, the Expected Family Contribution (EFC) percentage for the period, and the activity date of the maintenance.
RORTPRD	Aid Period/Term Rules	Specify the terms that you want to associate with an aid period.
RTVCOMP	Budget Component Validation	Define and maintain standard budget component codes.
RTVBTYPE	Budget Type Validation	Define and maintain standard budget type codes.
RTVBGRP	Budget Group Validation	Create and maintain standard budget group codes.
RORRULE	Financial Aid Selection Rules	Write rules for group selection, fund management, and satisfactory academic progress based on the rule type that you enter.
RBRGTYP	Budget Group/Type Rules	Identify which budget types are valid for students in a particular budget group.

Form	Full Name	Use this Form to...
RBRCOMP	Budget Component Rules	Associate a set of budget components with a budget group/budget type/aid period for a specified aid year and assigns dollar amounts to the components.
RTVCCOM	Comment Category Validation	Define category codes that can be used for comments entered on the Applicant Comments Form (RHACOMM).
RTVMESG	Message Code Validation	Maintain message-related codes and text.
RBAABUD	Applicant Budget	Assign a set of budget components to a financial aid applicant for a specified aid year.
ROAIMMP	Applicant Immediate Process	Assign an applicant's budget.
RORGRPS	Automatic Group Assignment	Assign a budget to groups of students.
RHACOMM	Applicant Comments	Enter comments about an applicant's changes in his/her budget.