

Banner Financial Aid Electronic Data Exchange Training Workbook

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4/30/2008	New version that supports Banner 8 software.
1/07/2009	Revised to support Banner Financial Aid 8.3 software.

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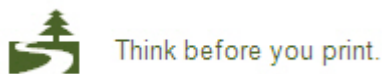


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Introduction



Workbook goal

The goal of this workbook is to provide you with the knowledge and practice to accurately handle electronic data exchange at your institution. The workbook is divided into three sections:

- Introduction
- Day-to-day operations
- Appendix

Intended audience

Financial Aid office administrators and staff.

Prerequisites

To complete this section, you should have

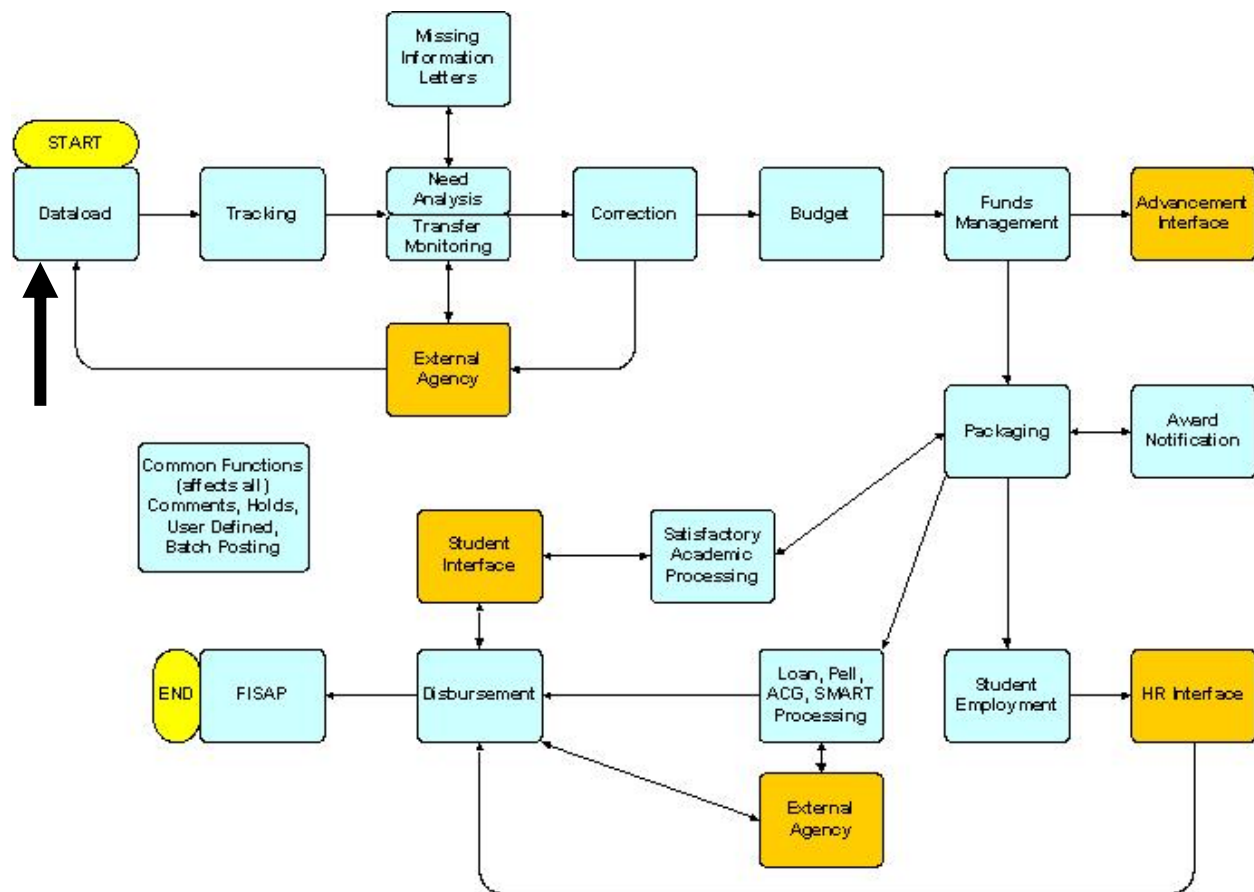
- completed the Education Practices computer-based training (CBT) tutorial *Banner 8 Fundamentals*, or have equivalent experience navigating in the Banner system
- completed the Financial Aid Overview training workbook
- ensured that the rules and validation codes in Banner needed for electronic data exchange have been set up for you.

Process Introduction

Introduction

The Financial Aid staff will be able to use this optional program provided by the Department of Education to obtain, change, and report federal student applicant data electronically using the various functions in the Banner Electronic Data Exchange (EDE) module.

Flow diagram



What happens

The Financial Aid staff (FA) will oversee this process for the institution.

Stage	Description	Comments
A Financial Aid manager...		
1	Verifies that EDE correction logging is checked on ROAUSIO.	Also verify the Budgeting, Packaging, and Need Analysis fields are checked to create audit trails.
2	Verifies that RORDATA table has been loaded.	Sungard Higher Education-delivered. We recommend the items not be added. Although, the EDE Audit and EDE Ind fields may be unchecked for the delivered data elements. Uncheck the EDE Audit field to exclude the item from being recorded in audit logging. Uncheck the EDE Ind field to exclude the item from the corrections process.
A Financial Aid manager...		
3	Verifies that RORDSUP table has been loaded.	Sungard Higher Education -delivered. You may add data to this table. The data elements are only logged for institutional use and will not be included in the corrections process.
4	Determine which tables should have logging activated and which action should be logged in ROALOGC. Consider whether to activate all data elements or specify only certain data elements to log.	<p>This form permits the logging of initial awards as well as changes in awards or deletion of awards. Audit logging for these tables is logged directly to ROILOGA.</p> <p>The ability to add or delete tables has been disabled. ROALOGC is currently limited to the following tables: RPRADSB, RPRATRM, and RPPAWRD.</p>

Stage	Description	Comments
A Financial Aid officer...		
5	<p>Access one of the forms that permit EDE corrections to be logged and makes appropriate corrections to the student applicant data in</p> <ul style="list-style-type: none"> • RNANAxX • RNAOVxx • RNAVRxx • RNAPRxx 	<p>If using RNAVRxx, the Individual Update and Page Update boxes must be checked for the logging to occur.</p> <p>EDE changes to student applicant data are stored in temporary logging tables.</p>
6	Runs RLRLOGG.	<p>Loads the latest change for each loggable field to the permanent log tables. The changes can now be visible on ROILOG, ROIALOG, and ROAALOG.</p> <p>The logged changes on ROILOGA are not the result of RLRLOGG but real time entries applied to the award forms based on the activation criteria selected in ROALOGC.</p>
7	Reviews ROIALOG.	Optional. Used to review changes that have been logged for individual students. This form is used by EDE Corrections and Direct Lending processes.
8	Reviews ROILOG.	Optional. Used to review changes that have been logged for the institution. This form is used by EDE Corrections and Direct Lending processes.
9	Resends rejected corrections in ROAALOG.	Allows for EDE Corrections to be resent when the Pell Corr field is Y and the date sent is not null (indicating that the correction has been previously sent). This form is used by EDE Corrections, Direct Lending, and Electronic Loan processes.

Stage	Description	Comments
A Financial Aid officer...		
10	Reviews related report RORALOG.	Shows the results of the RLRLOGG process and prints logged data changes and deletions. It also provides the option to purge the data log.
11	Reviews audit log changes applied in the awarding forms in ROALOGC.	Query on any field with the exception of the Name field.
12	Review ISIR corrections awaiting transmission to the CPS and to request electronic transmission of ISIRs from the CPS in REACORR.	<p>Enables the user to review pending ISIR transmissions, adjust SAR IDs, and exclude specific corrections from transmission. The Institution Change block can be used to request institutional school code changes. The Housing Code Change block provides the option to report housing code changes.</p> <p>Beginning with the 0405 aid year, duplicate ISIRs will no longer be supported through batch transactions and are now requested through the ISIR Datamart.</p>
13	Runs REBCDxx.	Creates a flat file (CORRxxIN) of ISIR corrections and requests for transmission to the Department of Education.
A Financial Aid officer or institution IT staff...		
14	Uses FTP software to move the file to a network or hard drive.	SunGard Higher Education does not support this software.
15	Uses the Department of Education software or web site to transmit the file for processing.	SunGard Higher Education does not support this software.

Stage	Description	Comments
A Financial Aid officer...		
16	Reviews related report RERCRCR.	This report will list corrections and ISIR requests created on a specific date.
17	Reviews outgoing batch information on RPIBATC.	<p>This form monitors the status of all data batches that process EDE Corrections in addition to Direct Lending, Electronic Loans, Transfer Monitoring, and Pell Reporting.</p> <p>For EDE Corrections, specifically select Main Type and Sub Type C.</p> <p>Batch integrity is not maintained for EDE Corrections so the Acpt, Rej, and Pend fields will not be updated.</p>
A Financial Aid officer or institution IT staff...		
18	Uses FTP software to move the file to the Banner data directory.	<p>SunGard Higher Education does not support this software.</p> <p>Optionally transfer the ISIR correction error message class (CORExxOP) to produce an error report.</p>
A Financial Aid officer...		
19	Runs RERFIxx.	This process produces an error report for the CORExxOP message class. The information in this file is not loaded into the Financial Aid System.
20	Follow the steps for the Data Load process to import the IDCOxxOP and/or IGCOxxOP messages classes.	These message classes are sent by the CPS as a result of the transmitted correction files.

Day-to-Day Operations



Introduction

Through the Banner EDE module and its communication software, you can receive ISIRs and send EDE corrections. Banner provides a system in which you can load ISIRs into Banner and automatically collect EDE corrections for subsequent processing. Banner eliminates the need to enter information twice for data that you must transmit to the central processor (CPS). This module provides you with these features:

- Applicant Record Creation – you can load ISIRs into the Banner system through the normal tape load electronic load process.
- Online Need Analysis – use online need analysis verification forms to log data changes to an applicant's record.
- ISIR Corrections -- run the Banner ISIR Correction/Request Process to create a data file for transfer to the central processor.

Objectives

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

- create ISIR corrections
- request institutional DRN changes
- run selected reports within Banner regarding EDE processing.

Changing Application Data

Purpose

Use the Need Analysis Document Verification form (RNAVRxx – where xx is the aid year) to compare the student-reported financial aid application data to tax return data.

If you need to make corrections to application data, then select the **EDE Correction Logging** checkbox on the U.S. Specific Institution Financial Aid Options Form (ROAUSIO). This flag should be determined during system setup.

Banner form

2009-2010 Need Analysis Document Verification RNAVR10 8.3 (s10b80)

ID: Pell Correction 0910

Student Parent

	Application	Tax Return	Update
Household Size:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number in College:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Type of Tax Return:	(None)	(None)	<input type="checkbox"/>
1040 A or EZ Eligible:	(None)	(None)	<input type="checkbox"/>
AGI:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Tax Paid:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Student's Earned Income:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Spouse's Earned Income:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Verification Status Code:	(None)		
<input type="checkbox"/> Federal Benefits Exist	<input type="checkbox"/>		

	Application	Tax Return	Update
Untaxed Income			
Tax-Deferred Pensions:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
IRA and Keogh Deductions:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Child Support Received:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Tax Exempt Interest:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Untaxed IRA Distributions:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Untaxed Pensions:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Military and Clergy Allowance:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
VA Non-Education Benefits:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Other Untaxed Income:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Other Non-Reported Money:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

	Application	Tax Return	Update
Additional Financial Information			
Education Tax Credits:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Child Support Paid:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Need Based Employment:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Grant and Scholarship Aid:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Combat Pay:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Update Application Record

Steps

Follow these steps to complete the process.

1. Access the U.S. Specific Institution Financial Aid Options Form (ROAUSIO).
Note: This flag should have been checked during system setup.
2. Enter the code for the aid year in the **Aid Year** field.
3. Perform a **Next Block** function.
4. Select the **Pell and EDE Options** tab.
5. Click the **EDE Correction Logging** checkbox.
6. Click the **Save** icon.
7. Click the **Exit** icon.
8. Access the SAR Inquiry Form (ROISARI).
9. Perform a **Next Block** function.
10. Perform an **Execute Query** function.
11. Write down the ID (not the SAR ID) for a student with a SAR record in Banner for whom you wish to change application data.
12. Access the Need Analysis Document Verification Form (RNAVRxx).
Note: xx= the aid year.
13. Enter the ID of the student you selected in the **ID** field.
Note: The student you select must have a need analysis record for the EDE corrections process to work.
14. Verify the **Pell Correction** box contains a checkmark
Note: This field should have automatically been checked if the **EDE Corrections Logging** field on ROAUSIO was checked during system setup.
15. Perform a **Next Block** function to go to the Student Information block.
16. Change the displayed value in the **AGI** (Adjusted Gross Income) field in the **Tax Return** column and click on the **Update** checkbox.

17. Change the displayed value in the **Tax Paid** field in the **Tax Return** column and click on the **Update** checkbox.
18. Click on the **Update Application Record** check box at the bottom of the form to update the need analysis record on the RNANAxX form and to log the changes for EDE corrections.
19. Click the **Save** icon.
20. Select **Parent Information** from the **Options** menu.
21. Change the displayed value in the **AGI** (Adjusted Gross Income) field in the **Tax Return** column and click on the **Update** checkbox.
22. Change the displayed value in the **Tax Paid** field in the **Tax Return** column and click on the **Update** checkbox.
23. Click on the **Update Application Record** check box at the bottom of the form to update the need analysis record on the RNANAxX form and to log the changes for EDE corrections.
24. Click the **Save** icon.
25. Note the data in the **Application** column is updated with the new values.
26. Select **Calculate Need** from the **Options** menu
27. Click the **Exit** icon.

Changing Need Analysis Data

Purpose

The Need Analysis Form (RNANAx) provides a way to view and maintain the applicant's federal data for the aid year. The information on this form is specific to the aid year and the applicant, and is presented and stored in MDE-independent format. All applications can be viewed, but only the application marked as the current record can be modified.

If the student's application record has been created by federal data load, the information in this form is derived from the Institutional Student Information Record (ISIR), the electronic version of the Student Aid Report (SAR), which the Department of Education sends to the applicant.

Banner form

The screenshot shows a web-based form titled "2009-2010 Need Analysis RNANA10 8.3 (s10b80)". At the top, there are input fields for "ID:", "Source:", "Sequence Number:", "Current Record:" (checkbox), "EDE Correction:" (checkbox), "Transaction Number:" (input field with "0910"), and "Number of Applications:" (input field). A "Create Person" button is also present. Below these are tabs for "Demographic", "Plans and Educational Background", "Status", "Income and Assets", and "Information Release". The "Demographic" tab is active, showing a "Lock Current:" checkbox. The main form area contains fields for: Last Name, First Name, Middle Initial, Male or Female (dropdown), Address, City, State, Zip, Home Phone Number, Legal Residence, Resident Since, Driver's License State, Driver's License Number, Social Security Number, E-mail, Date of Birth, Citizenship Status, Alien Registration Number, Legal Resident Before 01-JAN-2004, Current Marital Status, Date of Status, 1st Bachelor's Degree by 01-JUL-2009, and Aid Eligibility Response or Drug Offense Conviction. Many of these fields are dropdown menus or have default values like "(None)".

Outcome

The ISIR is the Department's official notification to your institution about a student's expected family contribution (EFC) and eligibility for federal aid.

Steps

Follow these steps to complete the process.

1. Access the Need Analysis Form (RNANAxX).
2. In the **ID** field, enter the ID of the student for whom you are making data changes.
3. Verify the **EDE Correction** field is set to *Y*.

Note: This field should have automatically been checked if the **EDE Corrections Logging** field on ROAUSIO was checked during system setup.
4. Perform a **Next Block** function.
5. Select the **Income and Assets** tab.
6. Change the displayed value in the **Family Members** and **In College** fields in the **Parent** column.
7. Make any other changes directed by your instructor.
8. Click the **Save** icon.
9. Select **Calculate Need** from the **Options** menu
10. Click the **Exit** icon.

Performing a Need Analysis Simulation

Purpose

When a student's financial situation changes, you can perform a need analysis simulation to determine whether the change will lower the student's expected family contribution (EFC), thus entitling the student to additional financial aid. You use the Need Analysis Results Form (RNASLxx) and the Need Analysis Processing form (RNAPRxx) to do this.

Banner form

The Need Analysis Processing Form (RNAPRxx) provides users a means by which to view and maintain the federal data for the aid year.

2009-2010 Need Analysis Processing RNAPR10 8.3 (s10b80)

ID: Number of FM Applications: Number of IM Applications: 0910
FM Source: Sequence: Current: EDE Correction: IM Source: IM Type:

Biographic Data | Income and Benefits | Expenses | Assets | Expected Resources and Income | Prior Year Income and Overrides

FM Batch Lock Lock Current Keep FM Simulation Application Type:
 IM Batch Lock Lock IM Which Parent: Keep IM Simulation

	FM Parent	FM Student	Comment	IM Parent	IM Student	Comment
Social Security Number:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Number in Family:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Number in College:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Marital Status:	<input type="text" value="(None)"/>	<input type="text" value="(None)"/>	<input type="text"/>	<input type="text" value="(None)"/>	<input type="text" value="(None)"/>	<input type="text"/>
State of Residence:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Father or Stepfather's Date of Birth:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Mother or Stepmother's Date of Birth:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Lowest Income Filer:					<input type="text" value="(None)"/>	<input type="text"/>

(Press NEXT RECORD to skip columns)

Before you begin

The RNAPRxx form can be used to simulate a need analysis for anyone who has a General Person record.

Steps

Follow these steps to complete the process.

1. Access the Need Analysis Results Form (RNASLxx).
2. Enter the code for the aid year in the **Aid Year** field.
3. Enter the ID of the student in the **ID** field for whom you are simulating a need analysis.
4. Perform a **Next Block** function.
5. Write down the value displayed in the **Pell EFC** field.

Note: This is the current EFC.

6. Access the Need Analysis Processing Form (RNAPRxx).
7. Enter the ID in the **ID** field of the student for whom you are simulating a need analysis.
8. Select *S/M* in the **FM Source** field.

Warning: If *S/M* is not entered in the **FM Source** field and you attempt to save the simulation, the data will be saved in this form and in the Need Analysis form (RNANAx) as the actual data.

9. Perform a **Next Block** function.
10. Select the **Income and Benefits** tab.
11. Change the value to a lower amount in the **Reported IRS Adjusted Gross Income** field.
12. Click the **Save** icon.

Note: Since you made these changes with the **FM Source** of *S/M*, *these* changes are currently being saved in a temporary table.

13. Select **Calculate Need** from the **Options** menu and the Need Analysis process will run and calculate the temporary EFC.

Result: The Need Analysis Results Form (RNASLxx) will automatically display to show the newly calculated EFC in the **Pell EFC** field.

14. Click the **Exit** icon.

Result: You will return to the RNAPRxx form.

IF	THEN
You want to save the simulation	select the Keep FM Simulation check box and click the Save icon.
You do not want to save the simulation	click the Exit icon and the changes will not be saved.

Requesting a Duplicate Student Aid Report (SAR)

Introduction

Starting with 2004 - 2005, Duplicate Request processing no longer may be done through batch transactions -- this functionality is no longer available in Banner for 2004 - 2005 and beyond. Instead, Duplicate ISIRs are now requested using the FSA ISIR Datamart.

You may download a copy of the Electronic Data Exchange Technical Reference from the FSA download Web site.

Requesting an Institutional Change

Purpose

Students do not always list the proper college on their Free Application for Federal Student Aid (FAFSA). In these cases, schools have to send institutional changes through the federal processor. You again use the ISIR Correction/Request Form (REACORR) to request an institutional change.

Banner form

The screenshot shows a web browser window titled "ISIR Correction/Request REACORR 8.2 (s10b80)". Below the title bar, there is a dropdown menu for "Aid Year" set to "0910" and a label "2009-2010 Financial Aid year". The main content is a table with the following columns: Source, Sequence, CPS Correction Number, SAR ID, Delete Indicator, Data Element, and Correction Data. The table contains 20 rows of empty input fields. A vertical scrollbar is visible on the right side of the table.

Source	Sequence	CPS Correction Number	SAR ID	Delete Indicator	Data Element	Correction Data
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		
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				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		

Steps

Follow these steps to complete the process.

1. Access the ISIR Correction/Request Form (REACORR).
2. Enter the aid year code in the **Aid Year** field.
3. Perform a **Next Block** function.
4. Select **ISIR Request** from the **Options** menu.
5. Navigate to the **Institution Change** block.

Note: You may use this block to change a student's college-choice codes. Add your college code if it does not currently exist as one of the six institutions on the ISIR. You must enter a valid SAR ID and associated data release number (DRN) along with a college choice code.

6. Enter the Social Security number, the 1st two characters of the applicant's last name, and the transaction number of the ISIR being corrected in the **SAR ID** fields.
7. Enter the data release number in the **DRN** field.

Note: This is the personal identification number provided by the student (from the federal processor) to access his or her financial aid application data.

8. Enter the institution change code (1 to 6) in the **Choice** field that indicates the institution that the student wishes to change.
9. Click the **Save** icon.
10. Click the **Exit** icon.

Logging Data Changes From the Temporary Tables to the Permanent Log Tables

Purpose

Once changes have been made to a student's applicant data, the changes must be sent to the federal processor.

The Need Analysis Logging process (RLRLOGG) must be run to move changes from the temporary log tables to the permanent log tables. This is the first step in preparing the data to be sent to the federal processor.

Banner form

The screenshot shows a Banner form window titled "Process Submission Controls GJAPCTL 8.0 (s10b80)". The form is divided into several sections:

- Process:** A dropdown menu set to "RLRLOGG" and a text field containing "Need Analysis Logging_RPT".
- Parameter Set:** A dropdown menu.
- Printer Control:** A section with a "Printer:" dropdown, a "Special Print:" text field, a "Lines:" checkbox, and a "Submit Time:" text field.
- Parameter Values:** A table with three columns: "Number", "Parameters", and "Values". The first row has "01" in the "Number" column, "Aid Year code for logging" in the "Parameters" column, and an empty text field in the "Values" column. Below the table, it specifies "LENGTH: 4 TYPE: Character O/R: Required M/S: Single" and "Aid Year code for which the records will be logged."
- Submission:** A section with a "Save Parameter Set as" checkbox, a "Name:" text field, a "Description:" text field, a "Hold" radio button, and a "Submit" radio button.

Steps

Follow these steps to complete the process.

1. Access the Need Analysis Logging Process (RLRLOGG).
2. Enter a printer name in the **Printer** field or select one from the list of values (LOV).
3. Enter the code of the current aid year for Parameter 01 Aid Year Code in the **Values** field.
4. Select the **Save Parameters Set as** checkbox.
5. Click the **Submit** button.
6. Click the **Save** icon.

Result: This will execute the process.

7. Click the **Exit** icon.

Printing the Audit Log Report

Purpose

Using the Audit Log Report (RORALOG) you can view the results of the RLRLOGG process. You can print a report of data changes once the data changes have been moved from the temporary tables to the permanent tables.

Banner form

The screenshot shows a web-based form titled "Process Submission Controls GJAPCTL 8.0 (s10b80)". The form is divided into several sections:

- Process:** A dropdown menu set to "RORALOG" and a text field containing "Audit Log Report".
- Parameter Set:** A dropdown menu.
- Printer Control:** A section with a "Printer:" dropdown, a "Special Print:" text field, "Lines:" set to "55", and a "Submit Time:" text field.
- Parameter Values:** A table with two columns: "Number" and "Parameters". The "Parameters" column has a dropdown menu. To the right, there is a "Values" column with a dropdown menu and a list of input fields. The "Values" dropdown is currently set to "1".
- Submission:** A section with a checkbox for "Save Parameter Set as", a "Name:" text field, a "Description:" text field, and two radio buttons: "Hold" and "Submit".

Below the "Parameter Values" table, there is a legend: "LENGTH: 1 TYPE: Integer O/R: Optional M/S: Single LOW: 1 HIGH: 2" and a note: "Option to print data logs with aid year in the table or not."

Steps

Follow these steps to complete the process.

1. Access the Audit Log Report (RORALOG).
2. Enter a printer name in the **Printer** field or select one from the list of values (LOV).
3. Enter the code of the current aid year for Parameter 02 Aid Year Code in the **Values** field.
4. Enter a sort sequence for Parameter 08 Sort Sequence.
5. Select the **Save Parameter Set as** checkbox.
6. Enter a unique name and description in the **Name** and **Description** fields.
7. Click the **Submit** button.
8. Click the **Save** icon.

Result: This will execute the process.

9. Click the **Exit** icon.

Viewing or Deleting Corrections and Institutional Change Requests

Purpose

You can view or delete any corrections or institutional change requests that have been created. Using the ISIR/Corrections Request Form (REACORR) you can view the information waiting to be extracted and sent to the federal processor.

Note: The Need Analysis Logging process (RLRLOGG) has to have been executed and the corrections have to have been logged to the permanent tables.

Banner form

ISIR Correction/Request REACORR 8.2 (s10b80)

Aid Year: 0910 2009-2010 Financial Aid year

Source	Sequence	CPS Correction Number	SAR ID	Delete Indicator	Data Element	Correction Data
MANUAL	1	044	171990020	<input type="checkbox"/>	RCRAPP1_RECV_VET_BENEFITS	1
MANUAL	1	045	171990020	<input type="checkbox"/>	RCRAPP1_TYPE_VET_BENEFITS	4
MANUAL	1	056	171990020	<input type="checkbox"/>	RCRAPP1_UNTAX_PENSIONS	111
MANUAL	1	058	171990020	<input type="checkbox"/>	RCRAPP1_VETS_NON_ED_BEN	33333
MANUAL	1	060	171990020	<input type="checkbox"/>	RCRAPP1_OTH_NON_REPORT_MONEY	34243
MANUAL	1	088	171990020	<input type="checkbox"/>	RCRAPP1_PAR_FAM_MEMB	2
MANUAL	1	055	171990020	<input type="checkbox"/>	RCRAPP1_IRA_DISTRIBUTIONS	11111
MANUAL	1	119	171990020	<input type="checkbox"/>	RCRAPP1_PAR_VETS_NON_ED_BEN	66666
MANUAL	1	116	171990020	<input type="checkbox"/>	RCRAPP1_PAR_IRA_DISTRIBUTIONS	33333
MANUAL	1	117	171990020	<input type="checkbox"/>	RCRAPP1_PAR_UNTAX_PENSIONS	44444
MANUAL	1	050	171990020	<input type="checkbox"/>	RCRAPP4_COMBAT_PAY	44444
MANUAL	1	111	171990020	<input type="checkbox"/>	RCRAPP4_PAR_COMBAT_PAY	55555
MANUAL	1	107	171990020	<input type="checkbox"/>	RCRAPP3_PAR_EDUC_CREDITS	
MANUAL	1	107	171990020	<input type="checkbox"/>	RCRAPP3_PAR_EDUC_CREDITS	1
MANUAL	1	107	171990020	<input type="checkbox"/>	RCRAPP3_PAR_EDUC_CREDITS	
MANUAL	1	057	171990020	<input type="checkbox"/>	RCRAPP3_HOUSE_FOOD_OTH	22222
MANUAL	1	047	171990020	<input type="checkbox"/>	RCRAPP3_CHILD_SUPP_PAID	3
MANUAL	1	048	171990020	<input type="checkbox"/>	RCRAPP3_NEED_BASED_EMPLOY	343
MANUAL	1	049	171990020	<input type="checkbox"/>	RCRAPP3_GRANT_SCHOLAR_AID	22222
MANUAL	1	051	171990020	<input type="checkbox"/>	RCRAPP3_TAX_DEF_PENSION	1

Steps

Follow these steps to complete the process.

1. Access the ISIR/Correction Request Form (REACORR).
2. Enter the aid year code in the **Aid Year** field.
3. Perform a **Next Block** function.
4. Click the **Delete Indicator** checkbox for any correction you do not wish to transmit to the federal processor.

Note: For a correction to be sent, it must contain the entire SAR ID (Social Security number, first two letters of the last name, and transaction number of the SAR).

5. Click the **Save** icon.
6. Select ISIR Request from the **Options** menu and view the institution change requests. You can perform the **Record Remove** function to remove any of these requests
7. Click the **Save** icon.
8. Click the **Exit** icon.

Viewing Data Logs

Purpose

You can view logging information by:

- aid year using the Data Log Inquiry Form (ROILOG)
- a specific applicant using the Applicant Data Log Inquiry Form (ROIALOG)
- re-sending previously submitted changes using Data Log Application Form (ROAALOG)

Note: Using the Data Log Application Form (ROAALOG), you can re-send EDE corrections for a particular student as long as the **Pell Correction** field is *Y* and the date sent is not null (indicating that the correction has been previously sent).

Note: The Need Analysis Logging process (RLRLOGG) has to have been executed and the corrections have to have been logged to the permanent tables.

Banner form

The screenshot displays the 'Data Log Inquiry ROILOG 8.1 (s10b80)' web application. At the top, there is a dropdown menu for 'Aid Year' set to '0910' and a label '2009-2010 Financial Aid year'. Below this is the 'Primary Data Log' section, which contains three identical rows of search criteria. Each row includes fields for ID, Source, Sequence, User ID, Date, Time, Data, From, To, Batch Indicator, Loan Change Status, and Reject. The 'Batch Indicator' field is a checkbox, and the 'Loan Change Status' field is a radio button. Below the search criteria is a table with two columns: 'Field Name' and 'Supplemental Data Value'. The table has three rows of empty input fields.

Steps

Follow these steps to complete the process.

1. Access the Data Log Inquiry Form (ROIALOG).
2. Enter the aid year code in the **Aid Year** field.
3. Perform a **Next Block** function.
4. Press **F8** to execute the query.
5. Using the Scroll Bar review the items logged.
6. Click the **Exit** icon.

Banner form

Applicant Data Log Inquiry ROIALOG 8.0 (s10b80)

Aid Year: 0910 ID: [] []

Primary Data Values

Source: [] Sequence: [] Data: [] Date: [] Time: [] User ID: []
From: [] Pell Correction Direct Loan Correction Batch Indicator Loan Change Status: []
To: [] Reject: [] []

Source: [] Sequence: [] Data: [] Date: [] Time: [] User ID: []
From: [] Pell Correction Direct Loan Correction Batch Indicator Loan Change Status: []
To: [] Reject: [] []

Source: [] Sequence: [] Data: [] Date: [] Time: [] User ID: []
From: [] Pell Correction Direct Loan Correction Batch Indicator Loan Change Status: []
To: [] Reject: [] []

Field Name	Supplemental Data Value
[]	[]
[]	[]
[]	[]

Steps

Follow these steps to complete the process.

1. Access the Data Log Inquiry Form (ROIALOG).
2. Enter the aid year code in the **Aid Year** field.
3. In the **ID** field, enter the ID of the student you wish to review logged data.
4. Perform a **Next Block** function.
5. Using the Scroll Bar review the items logged.
6. Click the **Exit** icon.

Banner form

Applicant Data Log Application ROAALOG 8.0 (s10b80)

Aid Year: 0910 ID: [] []

Primary Data Values

Source: [] Sequence: [] Data: [] Date: [] Time: [] User ID: []
From: [] Pell Correction Direct Loan Correction Batch Indicator Loan Change Status: []
To: []

Loan ID or SAR ID: [] Date Sent: []
Document ID: [] Batch Number: []
 Resend Indicator Electronic Loan Indicator Electronic Fund Type: [] Recipient ID: []

Source: [] Sequence: [] Data: [] Date: [] Time: [] User ID: []
From: [] Pell Correction Direct Loan Correction Batch Indicator Loan Change Status: []
To: []

Loan ID or SAR ID: [] Date Sent: []
Document ID: [] Batch Number: []
 Resend Indicator Electronic Loan Indicator Electronic Fund Type: [] Recipient ID: []

Steps

Follow these steps to complete the process.

1. Access the Data Log Application Form (ROAALOG).
2. Enter the aid year code in the **Aid Year** field.
3. In the **ID** field, enter the ID of the student you wish to review logged data and resend a correction
4. Perform a **Next Block** function.
5. Using the Scroll Bar review the items logged and select an item with the Pell Correction field set to *Y*.
6. Click the **Resend** button.
7. Click the **Save** icon
8. Click the **Exit** icon.
9. Access the ISIR Correction/Request Form (REACORR) to review the entry created in preparation for the next REBCDxx process.

Running the ISIR Correction/ Request Process

Purpose

After you have reviewed and made any updates to the corrections, and institutional changes, you must run the ISIR/Correction Request process (REBCDxx) to create the file of ISIR correction and change requests.

Note: This process creates a flat file, which will then be sent to the federal processor.

Banner form

The screenshot shows a web-based form titled "Process Submission Controls GJAPCTL 8.0 (s10b80)". The form is divided into several sections:

- Process:** A dropdown menu set to "REBCD10" and a text box containing "2010 ISIR Corr/Request Process".
- Parameter Set:** A dropdown menu.
- Printer Control:** Includes a "Printer:" dropdown, "Special Print:" text box, "Lines:" checkbox, and "Submit Time:" text 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 for 2009-2010	0910
02	Resend Prev. Processed Records	N
03	Resend for Prior Date	
04	Application ID	
05	Selection ID	
06	Creator ID	
07	User ID	
08	Resend for Prior Date/Hour	
- Submission:** Includes a checkbox for "Save Parameter Set as", "Name:" text box, "Description:" text box, and radio buttons for "Hold" and "Submit".

Additional text below the table: "LENGTH: 4 TYPE: Character O/R: Required M/S: Single This must be the aid year code the 2009-2010 school year."

Steps

Follow these steps to complete the process.

1. Access the ISIR Corr/Request (REBCDxx) process.
2. Enter a printer name in the **Printer** field or select one from the list of values (LOV).
3. Enter the code of the current aid year for Parameter 01 Aid Year Code in the **Values** field.
4. Scroll to view parameter 10.
5. Enter *Y* or *N* in the **Values** field for Parameter 10 Send with Discrepant Trans #'s to indicate whether you would like to send corrections when the current ISIR transaction number differs from the transaction number on the applicant status.
6. Click the **Save Parameters Set as** checkbox.
7. Enter a unique name and description in the **Name** and **Description** fields.
8. Click on the **Submit** button.
9. Click the **Save** icon.
10. Click the **Exit** icon.

Printing the ISIR Correction/Request Control Report

Purpose

Using the ISIR Correction/Request Control Report (RERCRCR) you can view or print a list of corrections and ISIR requests created on a specific date.

Banner form

The screenshot shows a web application window titled "Process Submission Controls GJAPCTL 8.0 (s10b80)". The interface is divided into several sections:

- Process:** A dropdown menu set to "RERCRCR" and a text input field containing "ISIR Corr/Request Control Rpt".
- Parameter Set:** A dropdown menu.
- Printer Control:** Includes a "Printer:" dropdown, a "Special Print:" text input, "Lines:" set to "55", and a "Submit Time:" text input.
- Parameter Values:** A table with two columns: "Number" and "Parameters". The "Parameters" column has a dropdown menu. Below the table, there are "Values" input fields. The table contains the following data:

Number	Parameters	Values
01	Aid Year Code	
02	Activity Date	
03	Activity Date/Hour	
04	Activity Date/Minute	
- Submission:** Includes a checkbox for "Save Parameter Set as", "Name:" and "Description:" text inputs, and radio buttons for "Hold" and "Submit".

Additional text below the Parameter Values table: "LENGTH: 4 TYPE: Character O/R: Required M/S: Single Valid/Active Aid Year Code"

Steps

Follow these steps to complete the process.

1. Access the ISIR Correction/Request Control Report (RERCRCR).
2. Enter a printer name in the **Printer** field or select one from the list of values (LOV).
3. Enter the code of the current aid year for Parameter 01 Aid Year Code in the **Values** field.
4. Enter a date for Parameter 02 Activity Date in the **Values** field.
5. Click the **Save Parameter Set as** checkbox.
6. Enter a unique name and description in the **Name** and **Description** fields.
7. Click on the **Submit** button.
8. Click the **Save** icon.
9. Click the **Exit** icon.

Reviewing Batch Control Information

Purpose

Using the Batch Control Form (RPIBATC) you can view all data batches that process EDE corrections in addition to Direct Lending, Electronic Loans, Transfer Monitoring, and Pell Reporting.

Note: The ISIR Correction/Request Process (REBCDxx) has to have been executed.

Banner form

The screenshot shows the RPIBATC 8.0 software interface. At the top, there are three dropdown menus: "Aid Year:" with the value "0910", "Main Type:" with the value "C=EDE", and "Submission Type:" with the value "C=Plus Cr/EDE Corr". Below these is a table with the following columns: "Batch ID", "Creation Date", "Records" (which is further divided into "Processed", "Accepted", "Rejected", and "Pending"), and "Confirmation Date". The table contains 20 rows of empty data entry fields. A vertical scrollbar is visible on the right side of the table.

Steps

Follow these steps to complete the process.

1. Access the Batch Control Form (RPIBATC).
2. Enter the aid year code in the **Aid Year** field.
3. Select *C=EDE* for the **Main Type** field.
4. Select *C=Plus Cr/EDE Corr* for the **Sub Type** field.
5. Perform a **Next Block** function.
6. Review the Batch ID and No of Records for the batch created in the previous exercise.
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

You can change financial aid application or need analysis data on the

- a. Need Analysis Form (RNANAx), Applicant Requirements Form (RRAAREQ), and Applicant Override Form (RNAOVxx).
- b. Need Analysis Form (RNANAx), Applicant Budget Form (RBAABUD), and Applicant Override Form (RNAOVxx).
- c. Need Analysis Form (RNANAx), Applicant Requirements Form (RRAAREQ), and Award Form (RPAAWRD).
- d. Need Analysis Form (RNANAx), Need Analysis Document Verification Form (RNAVRxx), and Applicant Override Form (RNAOVxx).
- e. Need Analysis Form (RNANAx), Applicant Needs Analysis Application Inquiry Form (RNIAPPL), and Applicant Override Form (RNAOVxx).

Question 2

In order to log changes to financial aid application data, the U.S. Specific Institution Financial Aid Options form (ROAUSIO) must have the

- a. Budgeting indicator box checked.
- b. Packaging indicator box checked.
- c. Need Analysis indicator box checked.
- d. Pivot Date field with the day changes are being made.
- e. EDE Correction indicator box checked.

Question 3

Need analysis data is derived from information reported on two federally created documents which are

- a. FAFSA and ISIR.
- b. Profile and FAFSA.
- c. SAR and ISIR.
- d. Independent Verification Document and Dependent Verification Document.
- e. Tax returns and SAR.

Question 4

A major purpose for performing need analysis simulations in Banner is to

- a. determine if student will get a refund check.
- b. determine if changes in income will effect a student's expected family contribution (EFC).
- c. verify a student's eligibility status due to a defaulted loan.
- d. process a loan application.
- e. see if a student has been admitted to the College.

Question 5

Fill in the blank.

The form you use to perform a need analysis simulation in Banner is _____.

Question 6

If you want to save your changes when you perform a need analysis simulation on the Need Analysis Processing Form (RNAPRxx), you

- a. must select the Keep FM Simulation checkbox first.
- b. must select the Keep Need Analysis checkbox first.
- c. must select the FM Batch Lock checkbox first.
- d. just enter the changed income/asset information and exit the form.
- e. must select the Keep Manual checkbox first.

Question 7

An ISIR is a(n)

- a. Free Application for Federal Student Aid that is a form you complete to receive financial aid.
- b. verification document that is required for you to complete when selected for verification.
- c. Institutional Student Information Record, which is an electronic version of the Student Aid Report.
- d. Student Aid Report, which is the paper version of the Institutional Student Information Record.
- e. form in Banner that you use to make your changes for verification.

Question 8

Fill in the blank.

The name of the form you use to request institutional changes in Banner is _____.

Question 9

The function of the Need Analysis Logging process (RLRLOGG) is to

- a. move changes on the student's record from permanent tables to temporary tables.
- b. move changes on the student's record from temporary tables to permanent tables.
- c. create the flat file of EDE corrections that will be sent to the central processor.
- d. request a duplicate ISIR.
- e. request institutional changes.

Question 10

Fill in the blank.

The name of the process that you must run to make records appear in the main window of the ISIR/Correction Request form (REACORR) is _____.

Question 11

The function that the ISIR/Correction Request process (REBCDxx) performs is to

- a. update the EDE record with the corrected income/asset information.
- b. create an ISIR correction file to send to the central processor.
- c. load EDE records into Banner.
- d. load NSLDS records into Banner.
- e. move changes on student's records from temporary tables to permanent tables.

Answer Key for Self Check

Question 1

You can change financial aid application or need analysis data on the

- a. Need Analysis Form (RNANAx), Applicant Requirements Form (RRAAREQ), and Applicant Override Form (RNAOVxx).
- b. Need Analysis Form (RNANAx), Applicant Budget Form (RBAABUD), and Applicant Override Form (RNAOVxx).
- c. Need Analysis Form (RNANAx), Applicant Requirements Form (RRAAREQ), and Award Form (RPAAWRD).
- d. Need Analysis Form (RNANAx), Need Analysis Document Verification Form (RNAVRxx), and Applicant Override Form (RNAOVxx).**
- e. Need Analysis Form (RNANAx), Applicant Needs Analysis Application Inquiry Form (RNIAPPL), and Applicant Override Form (RNAOVxx).

Question 2

In order to log changes to financial aid application data, the U.S. Specific Institution Financial Aid Options form (ROAUSIO) must have the

- a. Budgeting indicator box checked.
- b. Packaging indicator box checked.
- c. Need Analysis indicator box checked.
- d. Pivot Date field with the day changes are being made.
- e. EDE Correction indicator box checked.**

Question 3

Need analysis data is derived from information reported on two federally created documents which are

- a. FAFSA and ISIR.
- b. Profile and FAFSA.
- c. **SAR and ISIR.**
- d. Independent Verification Document and Dependent Verification Document.
- e. Tax returns and SAR.

Question 4

A major purpose for performing need analysis simulations in Banner is to

- a. determine if student will get a refund check.
- b. **determine if changes in income will effect a student's expected family contribution (EFC).**
- c. verify a student's eligibility status due to a defaulted loan.
- d. process a loan application.
- e. see if a student has been admitted to the College.

Question 5

The form you use to perform a need analysis simulation in Banner is **Need Analysis Processing Form (RNAPRxx)**.

Question 6

If you want to save your changes when you perform a need analysis simulation on the Need Analysis Processing Form (RNAPRxx), you

- a. **must select the Keep FM Simulation checkbox first.**
- b. must select the Keep Need Analysis checkbox first.
- c. must select the FM Batch Lock checkbox first.
- d. just enter the changed income/asset information and exit the form.
- e. must select the Keep Manual checkbox first.

Question 7

An ISIR is a(n)

- a. Free Application for Federal Student Aid that is a form you complete to receive financial aid.
- b. verification document that is required for you to complete when selected for verification.
- c. **Institutional Student Information Record, which is an electronic version of the Student Aid Report.**
- d. Student Aid Report, which is the paper version of the Institutional Student Information Record.
- e. form in Banner that you use to make your changes for verification.

Question 8

The name of the form you use to request institutional changes in Banner is **ISIR Correction/Request Form (REACORR)**.

Question 9

The function of the Need Analysis Logging process (RLRLOGG) is to

- a. move changes on the student's record from permanent tables to temporary tables.
- b. move changes on the student's record from temporary tables to permanent tables.**
- c. create the flat file of EDE corrections that will be sent to the central processor.
- d. request a duplicate ISIR.
- e. request institutional changes.

Question 10

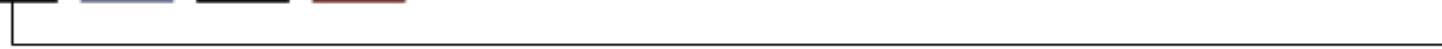
The name of the process that you must run to make records appear in the main window of the ISIR/Correction Request form (REACORR) is **Need Analysis Logging Process (RLRLOGG)**.

Question 11

The function that the ISIR/Correction Request process (REBCDxx) performs is to

- a. update the EDE record with the corrected income/asset information.
- b. create an ISIR correction file to send to the central processor.**
- c. load EDE records into Banner.
- d. load NSLDS records into Banner.
- e. move changes on student's records from temporary tables to permanent tables.

Appendix



Forms Job Aid

Form Code	Full Name	Use this form to...
RNAVRxx	Need Analysis Document Verification	compare the student-reported financial aid application data to tax return data.
RNANAx	Need Analysis	view and maintain the applicant's federal data for the aid year.
RNAPRxx	Need Analysis Processing	view and maintain the federal data for the aid year.
REACORR	ISIR Correction/Request	request an institutional change.
RLRLOGG	Need Analysis Logging	move changes from the temporary log tables to the permanent log tables.
RORALOG	Audit Log Report	view the results of the RLRLOGG process.
ROILOG	Data Log Inquiry	view logging information by aid year.
ROIALOG	Applicant	view logging information by a specific applicant.
ROAALOG	Data Log Application	view logging information by re-sending previously submitted changes.
REBCDxx	ISIR/Correction Request process	create the file of ISIR correction and change requests.
RERCRCR	ISIR Correction/Request Control Report	view or print a list of corrections and ISIR requests created on a specific date.
RPIBATC	Batch Control	view all data batches that process EDE corrections in addition to Direct Lending, Electronic Loans, Transfer Monitoring, and Pell Reporting.