

Banner Financial Aid Packaging Training Workbook

Release 8.4 - May 2009

Updated 4/28/2009



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Revision History Log

Publication Date	Summary
4/30/2008	New version that supports Banner 8 software.
9/19/08	Updated version that supports Banner 8.2 software.
4/28/2009	Updated version that supports Banner Financial Aid 8.4 software.

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Think before you print.

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Introduction



Course goal

The goal of this workbook is to provide you with the knowledge and practice to accurately package students with awards at your institution. The workbook is divided into three sections:

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

Intended audience

Financial aid office administrators and staff.

Prerequisites

To complete this course, you should have

- completed the Training Services computer-based training (CBT) tutorial *Banner 8 Fundamentals* or have equivalent experience navigating in Banner
- 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

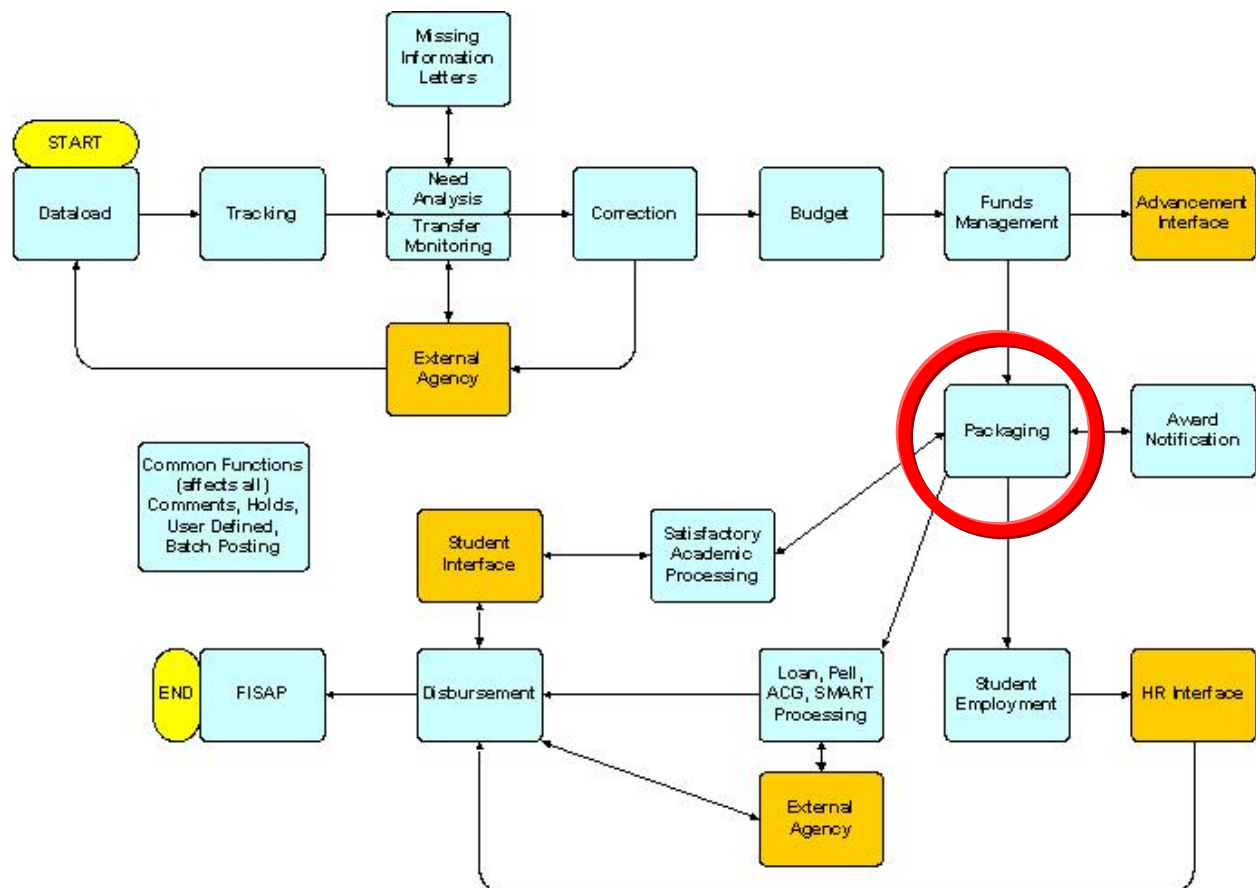
Introduction

The Financial aid office determines an award package for each applicant based on

- rules within the packaging module of Banner
- data from other financial aid modules
- federal financial aid rules.

Flow diagram

This diagram highlights the processes used to package funds within the overall Financial Aid process.



Key points

- Once a student has been placed into a tracking and budget group and completed the requirements, he/she is ready for the packaging process, using the Award Forms: (RPAAWRD, RPAAPMT, ROARMAN). The award maintenance forms displays and maintains packaging information for an applicant. The system automatically creates a RORSTAT record (for a student without a record for the aid year) when you enter any information on this form.
- Packaging Groups can be posted automatically using the Immediate Process Form (ROAIMMP) or the Batch Automatic Grouping Process (RORGRPS). Packaging groups can also be assigned manually through the RPAAWRD, RPAAPMT and ROARMAN forms.
- Before automatically posting packaging groups, you must build Packaging group codes (RTVPGRP) and group assignment rules using the Financial Aid Selection Rules Form (RORRULE). Funds to be awarded by the packaging process must be defined on Packaging Group/Fund Assignment form, RPRGFND.
- Once the packaging group is assigned, the Packaging Process (RPEPCKG) will assign funds to the student as determined by the user-defined packaging rules. Many factors determine packaging strategy.
- Packaging can also be done on-line automatically using the user defined packaging rules from the RPAAWRD, RPAAPMT or ROARMAN forms.
- The Award Acceptance Mass Entry Form (RPAMACC) enables you to enter a large number of applicant award acceptances or rejections for funds that have been awarded. The Award Offer Mass Entry Form (RPAMOFF) allows for the entry of a large number of applicant award offers and/or acceptances.

Set Up



Introduction

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

The Packaging module in Banner permits you to define packaging groups, the funds that are to be given to each group and the order in which they are to be given, and the packaging philosophy to be used (gap, equity, or self-help). This module provides you with the following features.

- Packaging Groups - defines an unlimited number of groups.
- Grouping of Students - places students with similar characteristics into the same groups. Packaging philosophies - defined by packaging group
- Mass Entry - allows entry of multiple awards for multiple students on a single screen.
- Letter Generation - provides the ability to print letters to students informing them of their awards.

Objectives

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

- define packaging group codes and rules
- define packaging options to determine when awards to students will be made
- create exemptions and third-party contract rules
- define when and how specific funds can be awarded to students using funds-management rules, and gap, equity and self-help packaging rules.

Packaging Options Form

The Packaging Options Form (RPROPTS) permits the selection of options that control how certain functions in Financial Aid perform.

Banner form

Packaging Options RPROPTS 8.0 (BAN8)

Aid Year: 0809 2008 - 2009 Aid Year

Packaging Options

Default Estimated Enrollment: Use Estimated Enrollment
1=Full Time

Package Using Estimated EFC
 Package if SAR C-Flag Exists
 Additional Stafford Eligibility Default

Source of Award History:
Offer Expiration Days:
Tracking Requirement Status:

Allow Award Mass Acceptance

Exemptions and Contracts Options

Interface Exemptions
 Interface Third Party Contracts
 Always Use Estimated
 Assume Full Time

Three Quarter Time Percentage:
Half Time Percentage:
Less than Half Time Percentage:

Disbursement Options

Disburse if Charges Not Accepted
 Allow Memos when Disbursement is Backed Out
 Disburse if SAR C-Flag Exists

Enrollment Option for Disbursement: A=Adjusted Hours

Field options

The **Packaging Options** section of this form is used to review, set, and/or adjust the indicators according to your institution's packaging policies. Adjustable options include the items in this table.

Field	Description
Use Estimated Enrollment	Check box determines whether to use estimated enrollment by default. Estimated Enrollment is taken from the RCRAPP1_EXP_ENROLL_STATUS from the RNANAXX Need Analysis Form.
Default Estimated Enrollment	The value in this field is used if the Use estimated enrollment indicator is not checked. Also used if the Use estimated enrollment indicator is checked but the RCRAPP1 expected enrollment field is null on the Need Analysis Form (RNANAXX).
Package Using Estimated EFC	A packaging option that allows the institution to package using estimated EFC. A (Y)es permits estimated EFC's to be used in packaging. A (N)o prohibits estimated EFC's to be used in packaging.
Package if SAR C Flag Exists	Indicates whether Packaging should occur if SAR C-Flags exist. Y or blank - Package even if C-Flags exist. N - Do not package if C-Flags exist.
Additional Stafford Eligibility Default	Default indicator for additional Stafford eligibility. When this indicator is set to (Y)es, then all independent students will be eligible to receive the higher level of unsubsidized Stafford Loan.
Source of Award History	Indicates which source of award history to use during award packaging validation. B or blank - Banner, N - NSLDS.
Allow Award Mass Accept	A packaging option that enables the institution to accept the entire award package or individual awards using the RPAMACC form.
Offer Expiration Days	A packaging option that allows the institution to determine the number of days that a financial aid offer is valid prior to expiration. This date when defaulted into individual awards can be utilized with the Award Cancellation Process.
Tracking Requirement Status	Used to set an initial Tracking Requirement Status Code when the packaging of a fund triggers a requirement to be established. You may double-click the field to call up a table of existing status codes.

Exemptions and Contracts Options	Packaging options allowing you to interface contract and exemptions with accounts receivable and set rules prior to the exemptions and contracts being paid to the student. The exemptions and contract will interface to financial aid as resources.
Disbursement Options	Disbursement options allowing you to set that will either allow a disbursement to happen or not based on students situation (Enrollment, SAR C flags, Charges)

Steps

Follow these steps to start the packaging implementation of Banner.

1. Access the Packaging Options Form (RPROPTS).
2. Enter the **Aid Year** for which you will be setting packaging options.
3. Perform the **Next Block** function.
4. Review, set, and/or adjust the indicators in the **Packaging Options** section. Adjust some or all of these indicators, depending on the needs of your institution.
5. Review, set, and/or adjust the indicators in the **Exemptions and Contracts Options** section.

Note: You may toggle interface exemptions and/or third-party contracts on or off here; determine whether to always use estimated values and/or assume full-time status by default, and set percentages for less-than-full-time status.

6. Review, set, and/or adjust the indicators in the **Disbursement Options** section.

Note: You may determine here whether to disburse if charges are not accepted and/or if SAR C flags exist, whether to allow memos when disbursement has been backed out, and set an enrollment option for disbursement: Addjusted hours, Billing hours, or Expected enrollment.

7. Review, set, and/or adjust the indicators in the **Allow Memos when Disbursement is Backed Out**. This field indicates whether to allow memoing when disbursement has been backed out.
8. Click the **Save** icon.
9. Perform a **Next Block** function to access the Enrollment Cut Off Date Rules block.
10. Enter the term code appropriate to the aid year being used.
11. Enter the **Disbursement Enroll Option**: A, Adjusted Hours; B, Billing Hours, E, Expected Enrollment.

12. Enter your institution's enrollment/census date in the **Cut Off Date** field.

Result: This affects the Funds Management Form (RFRMGMT) options of the **If Ineligible Before/After Cut-Off Date** fields.

13. Click the **Save** icon.

14. Perform a **Next Block** function to access the Pell Options window.

15. Review, set, and/or adjust the indicators in the **Pay Pell if Disbursement Amount Differs from Award Amount** field.

Note: This field indicates if the system should pay the disbursement amount, award amount or a zero amount when the award and disbursement amounts are not equal according to the Pell Payment chart. The choices are always pay, never pay or pay the lesser.

16. Review, set, and/or adjust the indicators in the **Default Less Than Half Time Pell COA** field.

Result: This indicates the default PELL Cost of Attendance for students who are enrolled for less than half time.

17. Review, set, and/or adjust the indicators in the **Pay Pell if System EFC and SAR EFC are in Same Pell Payment Cell** field.

Note: This field indicates whether to disburse Pell when System EFC and SAR EFC aren't equal but are within the same PELL payment cell.

18. Review, set, and/or adjust the indicators in the **Delete Pell Award if Zero** field.

Note: A 'Y' indicates that Pell awards should be deleted from the database if the award is reduced to 0 by the Pell calculation, if no locks, originations, memo, authorization, or paid amounts exist.

19. Perform a **Next Block** function.

20. Review, set, and/or adjust the indicators in the **Term Code** field.

Note: This is the code defining the term for association with the financial aid cut-off date.

21. Review, set, and/or adjust the indicators in the **Pell Award Enroll Option** field.

Note: This indicates where the RPEPELL program is to retrieve the enrollment for the students selected when awarding PELL.

22. Review, set, and/or adjust the indicators in the **Pell Disbursement Enrollment Option** field.

Note: This indicates where the RPEDISB program is to retrieve the enrollment for the students selected when disbursing PELL.

23. Review, set, and/or adjust the indicators in the **Pell ISIR Term** field.

Note: If the choice in the Pell Award Enroll Option field is to award based on the ISIR/ FAFSA term, this indicator ties the term form to the appropriate term field on the Term Enrollment Information window of the Needs Analysis Form (RNANAx). The Term Enrollment Information window fields must be populated by the institution, as this information is no longer collected on the FAFSA.

Packaging Group Validation Form

The Packaging Group Validation Form (RTVPGRP) is used to create packaging groups and establish the priority rules for the group assignment and fund awarding processes.

Banner form

Group Code	Group Description	Group Priority	Award Priority	Group Active	Info Access	Activity Date
ONDPFR	On-time Dept Freshman	5	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-MAR-2008
ONDPUP	On-time Dept Upperclass	10	10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-MAR-2008
ONINFR	On-time Independ Freshman	20	20	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-MAR-2008
ONINUP	On-time Independ Upperclass	30	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-MAR-2008
GRAD	On-time Graduate	40	40	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-MAR-2008
GGIMDP	IM Dependent	50	50	<input checked="" type="checkbox"/>	<input type="checkbox"/>	04-MAR-2008
EFC=0	Zero EFC	97	97	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	21-JUL-2005
ZROEFC	zero EFC	98	98	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	21-JUL-2005
DLOAN	Direct Loan	100	100	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-JUN-2004
ELOAN	Electronic Loan	101	101	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-JUN-2004
GRADLN	Graduates Loans Only	130	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-MAR-2008
PLUS	Plus	130	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-MAR-2008
STFDE	Stafford	139	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-MAR-2008
LTDPR	Late Dept Freshman	140	140	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-JUN-2004
LTDPU	Late Dept Upperclass	150	160	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-JUN-2004
LTINFR	Late Independ Freshman	160	150	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-JUN-2004
LTINUP	Late Independ Upperclass	170	170	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-JUN-2004
LATEGR	Late Graduate	190	190	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-JUN-2004
ASK2	Alaska test 2	500	500	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-JUN-2004
ASK3	Alaska test 3	500	500	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-JUN-2004
FISAP	Fisap test group	500	500	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01-JUN-2004

Steps

Follow these steps to complete the process.

1. Access the Packaging Group Validation Form (RTVPGRP).
2. Enter the following to define your packaging group code: FRSHXX (where XX are your initials).
3. Enter a **Description** to identify your group as FRSHXX (where XX are your initials).
4. Enter the **Packaging Group Priority** and the **Award Priority**.

Note: Smaller values have higher processing priority; your values entered in these fields should always be less than that of the Packaging Default Group. Numbers for each group should be unique.

5. Click the **Group Active** field to activate the group.
6. Enter the **Info Access** – if a packaging group info access is checked then all students in that group, their awards are viewable in Self-Service, if the group's info access is not checked then the student's awards are not viewable in Self-Service.
7. Click the **Save** icon.
8. Click the **Exit** icon.

Financial Aid Selection Rules Form

The Financial Aid Selection Rules Form (RORRULE) enables you to perform a variety of functions based on the rule type. Instructions on this form are written in SQL and direct Banner to assign the packaging groups according to the varying rules.

Banner form

The screenshot shows the 'Financial Aid Selection Rules RORRULE 8.0 (BAN8)' window. At the top, there are four input fields: 'Rule Type' set to 'P-Packaging Group Assignment', 'Aid Year' set to '0809' with a sub-label '2008 - 2009 Aid Year', 'Group Code' set to 'ONDPFR' with a sub-label 'On-time Dept Freshman', and 'Fund Code' which is empty. To the right of these fields is a checked 'Active' checkbox. Below this is a 'Selection Criteria' section with a header row: 'Table Name', 'Column Name', 'Operator', and 'Value'. Below the header are several empty rows for data entry. At the bottom left is a 'Copy To' button with a document icon, and at the bottom center is a checked 'Rule Active' checkbox.

Steps

Follow these steps to complete the process.

1. Access the Financial Aid Selection Rules Form (RORRULE).
2. Select **Packaging Group Assignment** in the **Rule Type** field.
3. Enter the appropriate **Aid Year**.
4. Enter the **Group Code** previously created on RTVPGRP (FRSHXX).

Note: Do not input a fund code.

5. Determine what your selection criteria for this packaging group will be and enter that data into the **Selection Criteria** field. (example XX is for the aid year ending 0809 (09), XXXX is for the year 2008)

Examples: Here are some examples of possible selection criteria.

Freshman On-Time:

- RORSTAT_APPL_RCVD_DATE <= '01-MAY-XXXX'
- AND ROVSTXX_LEVEL_CODE = 'UG'
- AND RCRAPP1_YR_IN_COLL IN ('1','2')
- AND RCRAPP1_CURR_REC_IND = 'Y'

Freshman Late:

- RORSTAT_APPL_RCVD_DATE > '01-MAY-XXXX'
- AND ROVSTXX_LEVEL_CODE = 'UG'
- AND RCRAPP1_YR_IN_COLL IN ('1','2')
- AND RCRAPP1_CURR_REC_IND = 'Y'

6. Additional lines may be added to these groups to allow further definition. For example, add RCRAPP1_STAT_CODE_RES = 'WA' to select students who listed Washington State as their state of legal residence as listed on the Needs Analysis Form (RNANAx).
7. Click the **Save** icon. Select under options the compile rule option.
8. Click the **Exit** icon.

Result: By exiting the form, the rule will compile if you haven't already performed the compile process.

Packaging Group Fund Rules Form

The Packaging Group Fund Rules Form (RPRGFND) is used to establish fund-specific rules for your packaging group.

Banner form

Packaging Group Fund Rules RPRGFND 8.0 (BAN8)

Aid Year: Packaging Group: On-time Dept Freshman

Packaging Group Fund Rules

Fund	Short Description	Priority	Minimum Award Amount	Maximum Award Amount	Percent of Unmet Need	EFC Method	Algorithmic Rule Code	Activity Date
<input type="text" value="PERK"/>	Federal Perkins Loan	5	100.00	2,000.00	100.000	F	<input type="text"/>	17-OCT-2006
STFD	Federal Stafford Loan	10	101.00	8,500.00	100.000	F	<input type="text"/>	17-OCT-2006
STFDE	Stafford Electronic Loan	11	200.00	2,625.00	100.000	F	<input type="text"/>	17-OCT-2006
MERIT	Merit Scholarship	20	50.00	16,500.00	80.000	F	<input type="text"/>	17-OCT-2006
STATE	Stat Grant Program	20	.00	3,000.00	100.000	F	<input type="text"/>	17-OCT-2006
CWS	Federal Work-Study	30	500.00	1,200.00	100.000	F	<input type="text"/>	17-OCT-2006
PERK	Federal Perkins Loan	30	100.00	2,000.00	100.000	F	<input type="text"/>	17-OCT-2006
SEOG	Fed. Suppl. Opportuni	40	200.00	800.00	100.000	F	<input type="text"/>	17-OCT-2006
PERK	Federal Perkins Loan	50	200.00	1,500.00	100.000	F	<input type="text"/>	17-OCT-2006
STFD1E	Unsub Electronic Loan	60	200.00	6,625.00	100.000	F	<input type="text"/>	17-OCT-2006
INSC	Institutional Scholarship	60	.00	10,000.00	100.000	F	<input type="text"/>	17-OCT-2006
CWS	Federal Work-Study	70	.00	250,000.00	100.000	F	<input type="text"/>	17-OCT-2006
GAMB2	Gamberg Schol 2	100	.00	30,000.00	100.000	F	<input type="text"/>	25-MAR-2008

Copy To

Aid Year: Packaging Group: Copy

Procedure 1

Follow these steps to complete the process.

1. Access the Packaging Group Fund Rules Form (RPRGFND).
2. Enter the FRSHXX code you recently created in the Packaging Group field.
3. Click in the **Fund Code** field in the Packaging Group Fund Rules block and use the List of Values to select the funds to be awarded in this packaging group. Select a variety of funds (except Pell Grant, whose packaging process, RPEPELL, occurs outside of the RPEPCKG Process) including grants, loan, and work.

4. Define the priority code for the funds.

Note: This is the order in which you want Banner to auto-package the fund to this group of students. The lower the number the higher the priority.

5. Click in the **Award Amount Minimum** and **Maximum** fields and define the minimum and maximum amount a student may be awarded.

Note: Initially the award minimum and maximum will be populated from the RFRMGMT Form, but these amounts may be changed for specific packaging groups as needed.

6. Click in the **Percent Unmet Need** field and enter the percentage of unmet need this fund should meet when being awarded.
7. Click in the **EFC Method** field and define the methodology to be used in packaging the fund: I(nstitutional) or F(ederal).
8. Enter the **Algorithmic Rule Code** for the algorithmic packaging rule that determines the amount of the student's self-help awards during packaging.
9. Click the **Save** icon.

Procedure 2

Follow these steps to complete the process.

1. Access the Financial Aid Selection Rules Form (RORRULE).
2. Select **Packaging Group Fund Awarding** in the **Rule Type** field.
3. Confirm the previously used **Aid Year**.
4. Select a fund in the **Fund Code** field that you attached to the group on the Packaging Group Fund Rules Form (RPRGFND).
5. Move to the Selection Criteria block and enter

(RORSTAT_VER_COMPLETE = 'Y'

or RCRAPP1_VERIFICATION_MSG = '2')

Note: This rule will prevent this specific fund for this specific packaging group from being awarded if a student was selected for verification but verification is not complete.

6. Click the **Save** icon.
7. Select **Compile Rule** on the **Options** menu.

8. Click the **Exit** icon.

Result: By exiting the form, the rule will compile if you haven't already performed the compile process.

Default Packaging Rules Form

The Default Packaging Rules Form (RPRDEFR) may be used to set default limits and specifications for gap, equity, and self-help packaging for Financial Aid award packaging. This is an optional form depending on institutional policy.

Example: A decision has been made that all students who submitted their financial aid application after your deadline will have a mandatory \$500 gap in their financial aid award. In other words, every student who submitted his/her FAFSA late will have a minimum of \$500 of unmet need automatically built into his/her financial aid award.

Banner form

Default Packaging Rules RPRDEFR 8.0 (BAN8)

Aid Year: 0708 2007-2008 Aid Year

Gap Packaging

Percent of Gross Need	Gap Amount	Algorithmic Rule Code	Activity Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Equity Packaging

Percent of Gross Need	Percent of Budget	Equity Amount	Algorithmic Rule Code	Maximum Award Amount	Activity Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Self-Help Packaging

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

Steps

Follow these steps to complete the process.

1. Access the Default Packaging Rules Form (RPRDEFR).
2. Confirm the **Aid Year**.
3. Move to the GAP Packaging block.
4. Enter \$500 in the **GAP Amount** field.

Note: If you are utilizing algorithmic packaging, the Algorithmic Rule Code field enables you to perform gap packaging based on specific rules, rather than by set amounts.

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

Packaging Rules Form

The Packaging Rules Form (RPRPCKR) may be used to automate GAP, equity, or self help packaging strategies based on packaging groups. This is an optional form depending on institutional policy.

Banner form

Packaging Rules RPRPCKR 8.0 (BAN8)

Aid Year: 0809 Packaging Group: ONDPFR On-time Dept Freshman

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

** Press CREATE RECORD to copy Default GAP Rules **

** Press COUNT QUERY HITS to query Default Packaging Rules **

Steps

Follow these steps to complete the process.

1. Access the Packaging Rules Form (RPRPCKR).
2. Confirm the **Aid Year**.
3. Select a **Packaging Group** from the List of Values that has been determined to be a pool of the late applicants.

Note: The group you created, FRSHXX, may be used.

4. Move to the **Gap Packaging Amount** field.
5. Perform an **Insert Record** function to pull your default amount created on RPRDEFR.
6. Modify your GAP amount from \$500 to \$250. This will change the default from \$500 to \$250 only for the packaging group you have created. If your packaging group does not have a different amount than the default created on RPRDEFR, this step does not need to be performed.

Note: if you are using algorithmic packaging, select a code in the **Algorithmic Rule Code** field to enable you to perform gap packaging based on specific rules, rather than by set amounts.

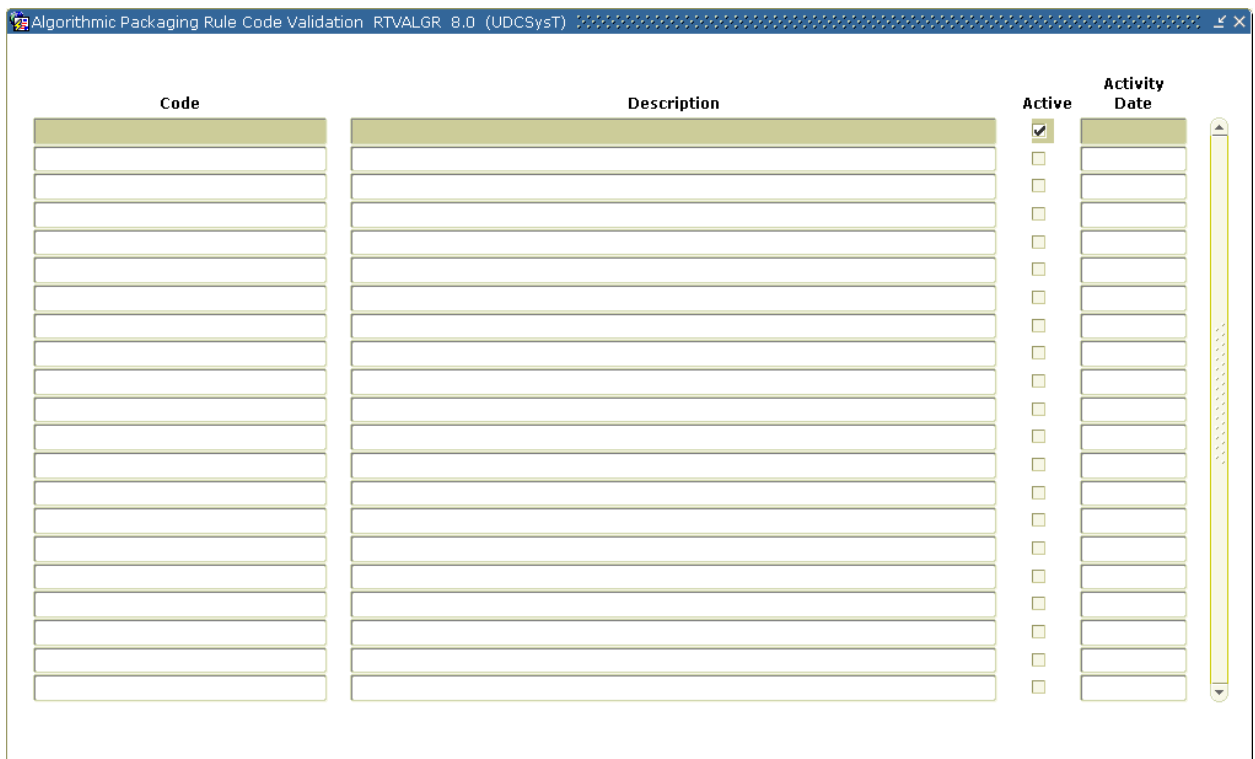
7. Click the **Save** icon.

Algorithmic Packaging Rule Code Validation Form

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

Use the Algorithmic Packaging Rule Code Validation Form (RTVALGR) to ensure that all sequences for the aid year and algorithmic packaging rule code have been validated on the Algorithmic Packaging Rules Form (RPRALGR). The **Algorithmic Rule Code** field enables you to perform gap packaging based on specific rules, rather than by set amounts. The algorithmic rule code must exist and be active on the Algorithmic Packaging Rule Code Validation Form (RTVALGR).

Banner Form



The screenshot displays a web-based form titled "Algorithmic Packaging Rule Code Validation RTVALGR 8.0 (UDCSysT)". The form contains a table with the following columns: Code, Description, Active, and Activity Date. The table has 20 rows. The first row has a checked checkbox in the Active column. The rest of the rows have unchecked checkboxes. The Activity Date column contains empty text boxes. A vertical scrollbar is visible on the right side of the table.

Code	Description	Active	Activity Date
		<input checked="" type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<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 these steps to create algorithmic rule codes.

1. Access the Algorithmic Packaging Rule Code Validation Form (RTVALGR).
2. Click the **Insert Record** icon to add a algorithmic rule code.
3. Enter a code in the **Algorithmic Rule Code** field.
4. Click the **Active** field.
5. Click the **Save** icon.
6. Click the **Exit** icon.

Steps

Follow these steps to define fund categories.

1. Access the Fund Category Validation Form (RTVFCAT).
2. Enter a fund category code in the **Code** field.
3. Enter a description in the **Description** field.
4. Select the **Active** field to indicate that this fund category code is active.
5. Click the **Save** icon.
6. Click the **Exit** icon.

Group Inquiry Form

Use the Group Inquiry Form (ROIGRPI) to display group information for all valid group codes and the number of students assigned to each group for the specified aid year and group type.

Banner form

Group Inquiry ROIGRPI 8.0 (BAN8)

Aid Year: 0809 2008 - 2009 Aid Year Group Type: Budgeting

Term:

Code	Description	Status Active	Group Priority	Award Priority	Rules Exist	Rules Active	Information Access	Student Count	Activity Date
		<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"/>		

Student Count ==> Total: Query:

Steps

Follow these steps to complete the process.

1. Access the Group Inquiry Form (ROIGRPI).

Note: This form is an inquiry only form, so the information displayed cannot be updated, changed, or deleted.

2. Confirm the correct **Aid Year** in the key block.
3. Select the group type in the **Group Type** field to specify the type of information to be displayed in the form

Note: The **Term** field is valid only when the Group Type is SAP.

4. Review the fields described in the table.

Column	Purpose
Code	Group code and description for the Group type and Aid Year in the Key block.
Group Priority	Displays the priorities to be used during the automatic grouping process (RORGRPS), as defined on RTVPGRP.
Award Priority	Displays the priorities to be used during the automatic packaging process (RPEPCKG), as defined on RTVPGRP.
Rules Exist	Indicates whether group assignment rules have been established in RORRULE.
Information Access	This field will be checked if the info access indicator is checked for the group on RTVPGRP
Student Count	Indicates a total number of students that have been assigned to each group.
Student Count Total	The total student count for the group type in the key block.
Student Count Query	The total number of students assigned to the tracking groups included in that query.

5. Click the **Exit** icon.

Applicant High School Data Form

The Applicant High School Data Form (ROAHS DT) is used to enter the information necessary to establish high school eligibility for the Academic Competitiveness Grant (ACG). All the information that you need to prove student ACG eligibility is on this form.

Banner Form

Applicant High School and Admission Data ROAHS DT 8.2

ID:

Advanced Placement/International Baccalaureate Courses:

Required Courses Similar to State Scholars Initiative:

State Recognized Program of Study:

Recognized Program Reviewed, Not Eligible

State of Student's High School Graduation:

Student's High School Graduation Date:

Admission Test Above 75th Percentile

Teacher Expert Indicator

Steps

Follow these steps to complete the process.

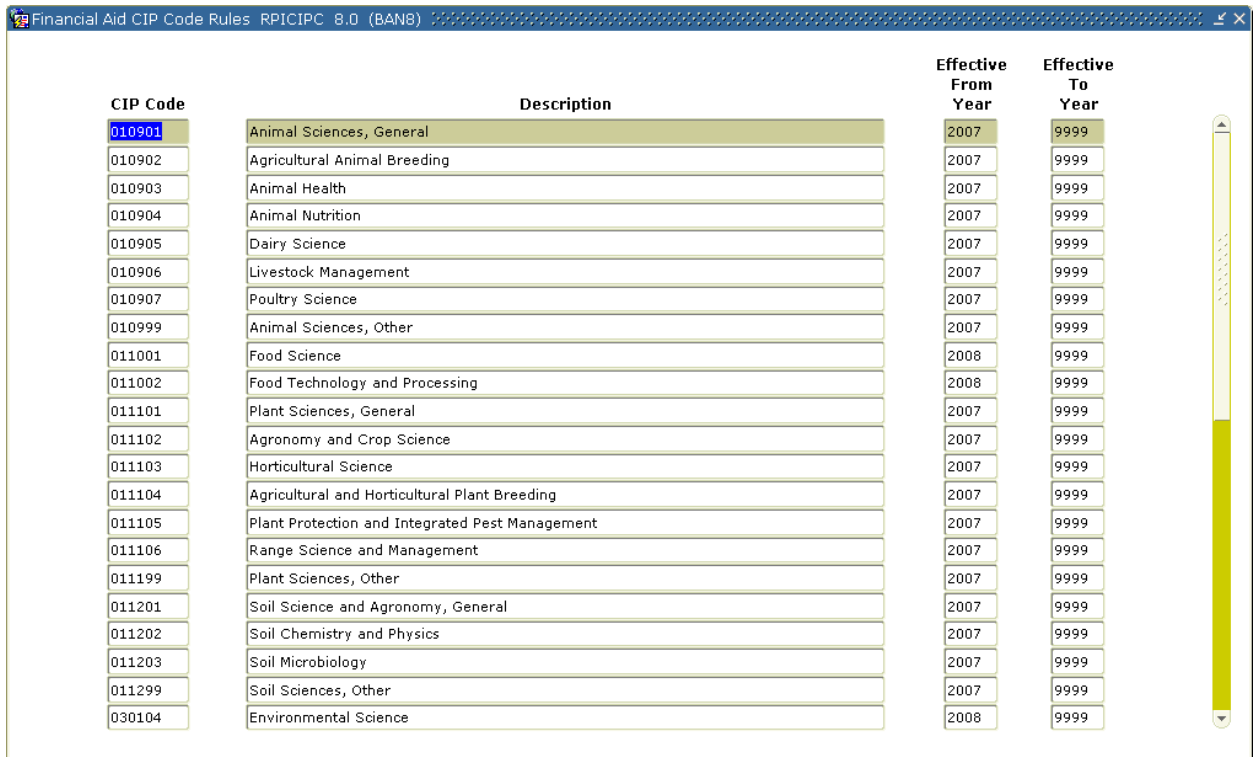
1. Access the Applicant High School Data Form (ROAHS DT).
2. Enter the student's identification number in the **ID** field.
3. Select if the student has completed the required number of Advanced Placement or International Baccalaureate courses and test scores in the **Advanced Placement/International Baccalaureate Courses** field.
4. Select if the student completed and passed the required number of english, math, social studies, science and foreign language courses in the **Required Courses Similar to State Scholars Initiative** field.
5. Select the state-specific advanced or honors program the student completed in high school in the **State Recognized program of Study** field.
6. Select if you have reviewed the program and deemed it not eligible in the **Recognized Program Reviewed, Not Eligible** field.

7. Select the state in which the student graduated from high school in the **State of Student's High School Graduation** field.
8. Select the date that the student completed his/her high school studies in the **Student's High School Graduation Date** field.

Financial Aid CIP Code Rules

The Financial Aid CIP Code Rules form (RPICIPC) contains the list of eligible programs of study for the SMART Grant. SunGard Higher Education maintains this list of eligible codes as required data.

Banner Form



The screenshot shows a window titled "Financial Aid CIP Code Rules RPICIPC 8.0 (BAN8)". It displays a table with four columns: "CIP Code", "Description", "Effective From Year", and "Effective To Year". The table lists various CIP codes and their corresponding descriptions, with the first row highlighted in green.

CIP Code	Description	Effective From Year	Effective To Year
010901	Animal Sciences, General	2007	9999
010902	Agricultural Animal Breeding	2007	9999
010903	Animal Health	2007	9999
010904	Animal Nutrition	2007	9999
010905	Dairy Science	2007	9999
010906	Livestock Management	2007	9999
010907	Poultry Science	2007	9999
010999	Animal Sciences, Other	2007	9999
011001	Food Science	2008	9999
011002	Food Technology and Processing	2008	9999
011101	Plant Sciences, General	2007	9999
011102	Agronomy and Crop Science	2007	9999
011103	Horticultural Science	2007	9999
011104	Agricultural and Horticultural Plant Breeding	2007	9999
011105	Plant Protection and Integrated Pest Management	2007	9999
011106	Range Science and Management	2007	9999
011199	Plant Sciences, Other	2007	9999
011201	Soil Science and Agronomy, General	2007	9999
011202	Soil Chemistry and Physics	2007	9999
011203	Soil Microbiology	2007	9999
011299	Soil Sciences, Other	2007	9999
030104	Environmental Science	2008	9999

Steps

Follow these steps to complete the process.

1. Access the Financial Aid CIP Code Rules Form (RPICIPC).
2. Review the codes listed on this form.
3. Click the **Exit** icon.

State Advanced/Honors Program Codes

The State Advanced/Honors Program Codes form (RPISAHP) lists the programs defined by the Department of Education as meeting the criteria for a rigorous high school program. SunGard Higher Education maintains this list as required data.

Banner Form

State	Program Code	Description	COD Program Code	Effective From Year	Effective To Year
AL	AL0001	Alabama Advanced Academic Endorsement	01	2007	9999
AL	AL0002	High Schools That Work Award of Educational Achievement	01	2007	9999
AR	AR0001	Arkansas Academic Challenge Core Curriculum	01	2007	9999
AR	AR0002	Arkansas Coursework Option	01	2007	9999
AR	AR6001	Arkansas State Scholars Initiative Requirements	01	2007	9999
AZ	AZ0001	Arizona Dual Credit Coursework Program	01	2007	9999
AZ	AZ6001	Arizona State Scholars Initiative Requirements	01	2007	9999
CA	CA0001	California Golden State Seal Merit Diploma	01	2007	9999
CA	CA0002	California A-G Requirements	01	2007	9999
CO	CO0001	Colorado Higher Education Admission Requirements (HEAR)	01	2007	9999
CO	CO6001	Colorado State Scholars Initiative Requirements	01	2007	9999
CT	CT0001	Connecticut Technical High School System Program	01	2007	9999
CT	CT0002	Connecticut Dual Enrollment Program	01	2007	9999
CT	CT6001	Connecticut State Scholars Initiative Requirements	01	2007	9999
DD	DD0001	Department of Defense Education Activity	01	2007	9999
DE	DE0001	Delaware Distinguished Achievement Diploma	01	2007	9999
DE	DE0002	High Schools That Work Award of Educational Achievement	01	2007	9999
DE	DE0003	Delaware Coursework Requirements	01	2007	9999
FL	FL0001	Florida Bright Futures Program	01	2007	9999
GA	GA0001	Georgia College Preparatory with Distinction Diploma	01	2007	9999
HI	HI0001	High Schools That Work Award of Educational Achievement	01	2007	9999
IA	IA0001	Iowa Coursework Requirements	01	2007	9999

Steps

Follow these steps to complete the process.

1. Access the State Advanced/Honors Program Codes form (RPISAHP).
2. Enter the state code of the honor or advanced program in the **State** field.
3. Enter the Code to define the state's honor or advanced program which has been approved by the Department of Education in the **Program Code** field.
4. Enter the description of the state's honor or advanced program in the **Description** field.

5. Enter the Code defined by COD for reporting the state's advanced or honors program in the **COD Program Code** field.
6. Enter the aid year end year indicating when this code became active in the **Effective From Year** field.
7. Enter the aid year end year indicating when this code became inactive in the **Effective To Year** field.

Financial Aid Degree Rules

The Financial Aid Degree Rules Form (RPRDEGR) enables you to define the degree award codes specific to Financial Aid processing. Use this form to indicate which degree codes are eligible for ACG and SMART Grants. The disbursement validation process uses the RPRDEGR rules and the eligibility indicators to determine if the fund should be disbursed to the student. It also provides you with the ability to create custom degree codes, such as a degree code representing a six-year doctorate program, where the student never receives a Bachelors degree, as eligible for an ACG and SMART Grant for the first four years of the student's undergraduate study. The degree codes are defined on STVDEGC.

Financial Aid Degree Rules RPRDEGR 8.0 (s10b80)

Aid Year: 0809 2008-2009 aid year

Degree Code	Description	ACG Eligible	SMART Eligible	Comment
AA	Associate in Arts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
AAS	Associate in Applied Science	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Test
AOT	Other Associate	<input type="checkbox"/>	<input type="checkbox"/>	This comment is less than 200 characters
BA	Bachelor of Arts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NO COMMENTS
BAR	Bachelor of Architecture	<input type="checkbox"/>	<input checked="" type="checkbox"/>	This comment is starting out at less than 200 charaters. Now it is goir
BCSE	BCSE	<input type="checkbox"/>	<input type="checkbox"/>	Test2
BS	Bachelor of Science	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
BSCE	BSCE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
BSCM	BS in Chemical Eng	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
BSME	Bach of Science & Mech Eng	<input type="checkbox"/>	<input type="checkbox"/>	

Additional Practice

Procedure 1

A decision has been made that all returning students cannot be awarded grants in excess of 75 percent of their total budget. Your institution has set the budget for an academic year to be \$15,000. Therefore, the total grant amount awarded to a returning student will never exceed \$10,500.

1. Access the Default Packaging Rules Form (RPRDEFR).
2. Confirm the **Aid Year**.
3. Move to the Equity Packaging block and enter 75 percent in the **Percent of Budget** field.
4. Click on the **Save** icon.
5. Click the **Exit** icon
6. Access the Packaging Rules Form (RPRPCKR).
7. Confirm the **Aid Year**.
8. Select a **Packaging Group** from the List of Values that has been determined to be a pool of the returning students.
9. Move to the **Equity Packaging Percent of Budget** field.
10. Perform an **Insert Record** function to pull your default percentage created on RPRDEFR.
11. Click the **Save** icon.
12. Click the **Exit** icon.

Procedure 2

A decision has been made that all freshmen students must have a minimum of \$2000 of self-help (work or loans) award in their award package.

Note: Equity Packaging and Self-Help packaging are mutually exclusive. Banner will allow you to define one or the other, but not both. In order to perform this exercise, you will need to remove the equity packaging information.

1. Access the Default Packaging Rules Form (RPRDEFR).
2. Confirm the **Aid Year**.
3. Move to the Self-Help Packaging block and enter \$2000 in the **Amount** field.
4. Click on the **Save** icon.
5. Click on the **Exit** icon
6. Access the Packaging Rules Form (RPRPCKR).
7. Confirm the **Aid Year**.
8. Select a packaging group from the List of Values that has been determined to be a pool of the freshmen students.
9. Move to the **Self-Help Packaging Amount** field.
10. Perform an **Insert Record** function to pull your default amount created on RPRDEFR.
11. Click the **Save** icon.
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 purpose for using the Packaging Options Form (RPROPTS) is to

- a. define your global packaging policies.
- b. create a packaging group.
- c. establish fund awarding rules.
- d. set up self-help packaging rules.
- e. set up equity packaging rules.

Question 2

The packaging options listed below are found on which form?

- The Use Estimated Enrollment check box determines whether to use estimated enrollment by default.
- The Default Estimated Enrollment field sets the default option for all funds (full-time, $\frac{3}{4}$ time, $\frac{1}{2}$ time or less than $\frac{1}{2}$ time).
- The Package Using Estimated EFC check box determines whether estimated EFC will be used.
- The Package if SAR C Flag Exists check box determines whether packaging will be allowed when SAR C flags exist.
- Additional Stafford Eligibility Default determines whether Banner should check for additional eligibility.
- The Allow Award Mass Accept check box determines whether mass acceptance of the entire applicant package will be allowed.
- The Offer Expiration Days field sets the number of days before the offer is no longer valid.
- The Tracking Requirement Status field will contain a tracking requirement status code; you may double-click the field to call up a table of existing status codes.

FORM:

- a. Institutional Options Form (ROAINST).
- b. Packaging Group Fund Rules Form (RFRGFND).
- c. Packaging Rules Form (RPRPCKR).
- d. Packaging Options Form (RPROPTS).
- e. Default Packaging Rules Form (RPRDEFR).

Question 3

The two main steps you must follow to establish a packaging group are first you must

- a. complete RPROPTS, then establish the group selection criteria on RORRULE.
- b. create a packaging group on RTVPGRP, then establish the group selection criteria on RORRULE.
- c. create RPRDEFR, then create RPRFSRC.
- d. create RPRPCKR, then establish the group selection criteria on RORRULE.
- e. create RPRGFND, then establish the group selection criteria on RORRULE.

Question 4

The form used to set up specific lists of funds for a packaging group is the

- a. Packaging Rules Form (RPRPCKR).
- b. Packaging Options Form (RPROPTS).
- c. Packaging Group Validation Form (RTVPGRP).
- d. Default Packaging Rules Form (RPRDEFR).
- e. Packaging Group Fund Rules Form (RPRGFND).

Question 5

The Banner Financial Aid System will allow you to define both Equity Packaging and Self-Help packaging simultaneously.

True or False

Answer Key for Self Check

Question 1

The purpose for using the Packaging Options Form (RPROPTS) is to

- a. **define your global packaging policies.**
- b. create a packaging group.
- c. establish fund awarding rules.
- d. set up self-help packaging rules.
- e. set up equity packaging rules.

Question 2

The packaging options listed below are found on which form?

- The Use Estimated Enrollment check box determines whether to use estimated enrollment by default.
- The Default Estimated Enrollment field sets the default option for all funds (full-time, $\frac{3}{4}$ time, $\frac{1}{2}$ time or less than $\frac{1}{2}$ time).
- The Package Using Estimated EFC check box determines whether estimated EFC will be used.
- The Package if SAR C Flag Exists check box determines whether packaging will be allowed when SAR C flags exist.
- Additional Stafford Eligibility Default determines whether Banner should check for additional eligibility.
- The Allow Award Mass Accept check box determines whether mass acceptance of the entire applicant package will be allowed.
- The Offer Expiration Days field sets the number of days before the offer is no longer valid.
- The Tracking Requirement Status field will contain a tracking requirement status

code; you may double-click the field to call up a table of existing status codes.

- a. Institutional Options Form (ROAINST).
- b. Packaging Group Fund Rules Form (RFRGFND).
- c. Packaging Rules Form (RPRPCKR).
- d. Packaging Options Form (RPROPTS).**
- e. Default Packaging Rules Form (RPRDEFR).

Question 3

The two main steps you must follow to establish a packaging group are first you must

- a. complete RPROPTS, then establish the group selection criteria on RORRULE.
- b. create a packaging group on RTVPGRP, then establish the group selection criteria on RORRULE.**
- c. create RPRDEFR, then create RPRFSRC.
- d. create RPRPCKR, then establish the group selection criteria on RORRULE.
- e. create RPRGFND, then establish the group selection criteria on RORRULE.

Question 4

The form used to set up specific lists of funds for a packaging group is the

- a. Packaging Rules Form (RPRPCKR).
- b. Packaging Options Form (RPROPTS).
- c. Packaging Group Validation Form (RTVPGRP).
- d. Default Packaging Rules Form (RPRDEFR).
- e. Packaging Group Fund Rules Form (RPRGFND).**

Question 5

The Banner Financial Aid System will allow you to define both Equity Packaging and Self-Help packaging simultaneously.

False. Equity Packaging and Self-Help packaging are mutually exclusive. Banner will allow you to define one or the other, but not both.

Day-to-Day Operations



Introduction

The purpose of this section is to explain the day-to-day or operational procedures to handle online and batch packaging at your institution.

Objectives

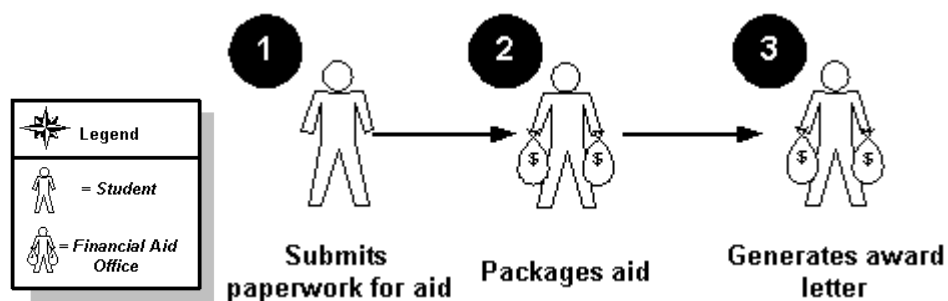
At the end of this section, you will be able to

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

Process Introduction

Flow diagram

This diagram highlights the process used to package funds.



What happens

The stages of the process are described in this table.

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

Steps

Follow these steps to complete the process.

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

1. Access the Award Form (RPAAWRD).
2. Confirm the previously used **Aid Year**.
3. Enter the ID of a student in the **ID** field who exists in Banner as a financial aid student.
4. Perform the **Next Block** function.
5. Select the **Packaging Group** tab at the bottom of the window.
6. Select the previously created group (FRSHXX) in the **Group** field.
7. Move to the **Fund** field on the Fund Awards block.
8. Select **Assign Packaging Group** from the **Options** menu.

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

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

Assigning a Student Online to a Packaging Group

Now that you are able to manually assign a student to a packaging group, it is time to have Banner assign a student to a packaging group based on the rules that have been created.

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

Banner form

Applicant Immediate Process ROAIMMP 8.0 (BAN8)

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

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

Calculated From: Effective:

Letter Generation

Letter Code: Term Code: Wait Days: Initial Code:

Steps

Follow these steps to complete the process.

1. Access the Applicant Immediate Process Form (ROAIMMP).
2. Confirm the previously used **Aid Year**.
3. Enter the ID of a student in the **ID** field who exists in Banner as a financial aid student.
4. Perform the **Next Block** function and select the Action Indicator option for an **Immediate Process** in the **Packaging Group Assignment** field.
5. Click in the **Term** field and select the correct term.
6. Click the **Save** icon.

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

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

Result: Banner will now package this student using the fund order set up on RPRGFND for the packaging group. Note: The student must have a budget assigned in order for any awards to be packaged.

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

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

Adding a Fund Manually to an Existing Package

You can use the Award Maintenance Form (RPAAWRD) to add a fund manually to an existing package.

Example: A student has come into your office with changes that affect his/her eligibility and you have revised his/her Need Analysis and Budget. The student has already been packaged, but the changes have resulted in additional eligibility and you choose to make those changes manually.

Banner form

The screenshot shows the Banner Award Maintenance Form (RPAAWRD) interface. At the top, there are fields for 'Aid Year' (set to 0910) and 'ID'. Below this are three tabs: 'Award Maintenance', 'Fund Awards by Term', and 'Disbursement Schedule'. The 'Fund Awards' section is active, showing a table with columns for 'Fund', 'Description', 'Status', 'Offered', 'Accepted', 'Declined or Cancelled', 'Memoed or Authorized', 'Paid', and 'Reschedule'. A 'Total' row is at the bottom of the table. Below the table are two tabs: 'Summary' and 'Packaging Group'. The 'Summary' section contains several input fields for 'Budget', 'Resource', 'Offered', 'Group', 'Pell EFC', 'Aid Period', 'EFC', 'Gross Need', 'Unmet Need', 'FM', 'IM', and 'Subsidized Loan Exclusion Amount'.

Steps

Follow these steps to complete the process.

1. Access the Award Maintenance Form (RPAAWRD).
2. Confirm the **Aid Year**.
3. Enter the ID of a student in the **ID** field who exists in Banner.
4. Click in the **Fund** field.

Note: Note the funds previously awarded to the student.

5. Perform an **Insert Record** function. Use the List of Values to choose an additional fund to award this student in this packaging group.
6. Click in the **Status** field and use the List of Values to select an Award Status that means 'Accepted'.
7. Click in the **Offered** field and then enter an amount of the award.
8. Click in the **Accepted** field and then enter an amount. (An accepted amount cannot be entered unless the award is in an Accepted status).

Note: The **System** field will display an M for manual award.

9. Continue these steps to award a variety of funds until you have completed the student's package. Click the **Save** icon when you have completed your additions.
10. Choose the **Packaging Group** tab.
11. The **Award Letter** field should be selected. If it is not, click in the **Award Letter** check box in the **Packaging Group** tab. Select this for the Population Selection process to identify the student in order to send him or her an award letter.
12. Click the **Save** icon.
13. Click the **Exit** icon.

Modifying an Award Amount of an Existing Package

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

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

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

Banner form

Package Maintenance RPAAPMT 8.4 (s10b80)

Aid Year: 0910 ID: []

Award Maintenance Fund Awards by Term Disbursement Schedule

Fund: [] Status: [] Status Date: []

Expiration Date: [] Lock: [] System: []

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

Reschedule Information Access

Overrides

Unmet Need: (None) Replace EFC: (None) Tracking Requirement: (None) Federal Limit: (None) Fund Limit: (None) Fund Award Rule: (None) Year in College: (None) No Pell: (None)

Summary Packaging Group

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

Banner form

Financial Aid Record Maintenance ROARMAN 8.0 (BANB)

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

Summary

Budget:	<input type="text"/>	Pell EFC:	<input type="text"/>	FM:	<input type="text"/>	IM:	<input type="text"/>	<input type="checkbox"/> Status	<input type="checkbox"/> Tracking
Resources:	<input type="text"/>	Gross Need:	<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="checkbox"/> Eligibility	<input type="checkbox"/> Pell Information
Offered Aid:	<input type="text"/>	Unmet Need:	<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="checkbox"/> Applicant Immediate Process	<input type="checkbox"/> Application Data
Budget Group:	<input type="text"/>							<input type="checkbox"/> Enrollment	<input type="checkbox"/> Resource
Aid Period:	<input type="text"/>	Subsidized Loan Exclusion Amount:	<input type="text"/>					<input type="checkbox"/> Budget	<input type="checkbox"/> Maintain Awards

Award Detail

Fund	Description	Status	Lock	System	Offered	Accepted	Declined or Cancelled	Memoed or Authorized	Paid	Web
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<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Procedure 2

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

1. Access the Award Form (RPAAWRD).

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

2. Confirm the **Aid Year**.
3. Enter the ID of a student in the **ID** field who exists in Banner.
4. Perform the **Next Block** function to navigate to the Fund Awards by Term block on the RPAAWRD Form.
5. Navigate to the fund term he/she wishes to have for one semester only.
6. Move to the **Percent** field and enter 100%.
7. Move to the second term and enter 0% in its **Percent** field.
8. Click the **Save** icon.

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

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

9. Click the **Exit** icon.

Procedure 3

Follow these steps to increase an existing award.

1. Access the Award Form (RPAAWRD).

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

2. Confirm the **Aid Year**.
3. Enter the ID of a student in the **ID** field who exists in Banner.
4. Perform the **Next Block** function to navigate to the Fund Awards by Term block on the RPAAWRD Form.
5. Navigate to the fund term he/she wishes to package an increase.
6. Move to the first terms offered amount and enter an increase to the terms award in both the offered and accepted amounts (if accepted).
7. Click the **Save** icon.

The following information window will appear:

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

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

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

8. Click the **Exit** icon.

Inputting Outside Resources

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

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

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

Banner form

Resource Code	Description	Count for Athletics	Information Access	Activity Date
EMBLEM	Emblem Club Scholarship	<input type="checkbox"/>	<input checked="" type="checkbox"/>	16-MAR-2004
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	

Steps

Follow these steps to complete the process.

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

Banner form

Resource Maintenance RPAARSC 8.0 (BAN8)

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

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

Summary

Budget: EFC: Resources:

Gross Need: Offered: Unmet Need:

Steps

Follow these steps to complete the process.

1. Access the Resource Maintenance Form (RPAARSC).
2. Confirm the **Aid Year**.
3. Select the ID number of a student.
4. Perform a **Next Block** function to move to the Other Resources block.
5. Move to the **Resource** field and enter the code previously created. Or use the **Search** icon to search for the resource code created on RTVARSC.

Result: The description is now populated.

6. Select an appropriate term for the aid year and the term for which the student received the scholarship in the **Term** field.
7. Enter the amount in the **Estimated** field and/or the **Actual** field.

8. Click on the **Save** icon.
9. Click on the **Exit** icon.
10. Review the results on the Award Form (RPAAWRD) in the **Resource** field of the **Summary** tab.

Note: this process can be done also through the ROARMAN form.

Preparing Mass Accept Awards

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

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

Banner form

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

Procedure 1

Follow these steps to complete the process.

1. Access the Award Acceptance Mass Entry Form (RPAMACC).
2. Confirm the **Aid Year**.
3. Select the **Student ID** of a student who has been offered a loan or work fund.
4. The **Accept Award** checkbox should be populated.
5. Click in the **Fund** field and enter a loan or work fund.

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

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

Note: If the student accepts the full award, you do not need to enter an amount in this field; the full amount of the award will be accepted. If the student accepts

the entire package you need not enter a fund code just the accept award flag, it will then accept all award that the student has that are offered.

7. Click on the **Save** icon.
8. Click on the **Exit** icon.
9. Access the Award Form (RPAAWRD).
10. Confirm the **Aid Year**.
11. Select the **ID** of the student whose award you previously accepted on RPAMACC.
12. Perform a **Next Block** function.

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

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

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

25. Click on the **Exit** icon.

Additional Practice

Steps

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

1. Access the Award Form (RPAAWRD).

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

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

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

6. Click the **Save** icon.
7. Select the **Next Block** function.
8. Double-click in the **Fund** field and select a fund.
9. Double-click in the **Status** field and select a Status code.
10. Enter an offer amount in the **Offered** field.

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

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

11. Students in need of a new or revised award letter must have a check manually placed in the **Award Letter** field of the Packaging Group Information section of RPAAWRD. Select this check box whenever the offered amount changes on any fund in the student's package and you want the changes to the fund to generate a new award letter (see *Section B Set up, Packaging Options and Fund Options*).

12. Click the **Save** icon.

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

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

14. Review the award package.

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

15. Click the **Exit** icon.

Entering Algorithmic Packaging Parameters

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

This form allows the use of user-defined functions.

Banner Form

The screenshot shows the 'Algorithmic Packaging Rules RPRALGR 8.0 (UDCSysT)' window. At the top, there are fields for 'Aid Year' (0809) and 'Rule'. Below this, there are several control fields: 'Sequence' with a text input, 'Validated' (checkbox), 'Active' (checkbox), 'Validate' (checkbox with checkmark), and 'Test Rule' (checkbox with bug icon). To the right are 'Award Minimum', 'Award Maximum', 'User ID', and 'Activity Date' fields. A large text area for the 'SQL Statement' is in the center. Below the SQL area is the 'Available for Lookup' section with 'Table', 'Column', and 'Parameter' dropdowns. At the bottom is the 'Copy To' section with 'Aid Year', 'Rule', 'Sequence' fields, a 'Copy All Sequences' checkbox, and a 'Copy' button.

Steps

Follow these steps to create algorithmic packaging rules.

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

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

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

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

10. Click the **Save** icon.

Validating algorithmic packaging parameters

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

Steps

Follow these steps to validate the SQL statement.

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

Testing algorithmic packaging parameters

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

Steps

Follow these steps to test the SQL statement.

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

Sample Algorithmic Packaging Rules

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

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

Place Fund Category Maximums on Packaging Groups

The Packaging Group Fund Category Maximums Rules Form (RPRFCAT) allows you to place fund category maximums on packaging groups. This allows you to limit the amount awarded to an applicant from multiple funds based on the maximum established for the category.

Banner Form

The screenshot shows a web browser window titled "Packaging Group Fund Category Maximums Rules RPRFCAT 8.0 (UDCSysT)". The form includes an "Aid Year" dropdown menu set to "0809". Below this is a table titled "Packaging Group Fund Category Maximums" with the following columns: "Packaging Group", "Group Description", "Fund Category", "Category Description", "Maximum Amount", and "Activity Date". The table contains 15 empty rows for data entry. At the bottom of the form, there is a "Copy To" section with an "Aid Year" dropdown menu and a "Copy" button with a document icon.

Steps

Follow these steps to set maximum awards for funds.

1. Access the Packaging Group Fund Category Maximums Rules Form (RPRFCAT) .
2. Verify or enter the aid year to apply values in the **Aid Year** field.
3. Click the **Next Block** icon.
4. Select a group from the **Packaging Group** field.
5. Select a category form the **Fund Category** field.

Note: There is a limit of 10 category codes per packaging group per aid year.

6. Enter an the maximum amount for a fund category in the **Maximum Amount** field.

Note: Use the **Copy To** block to copy the packaging group fund category maximums from the aid year displayed to another aid year.

7. Click the **Save** icon
8. 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 **Assign Packaging Group** option on the Award Form (RPAAWRD) creates an award package for the selected student based upon the institutions

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

Question 2

The Package Date field on RPAAWRD populates

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

Question 3

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

True or False

Question 4

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

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

Question 5

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

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

Question 6

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

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

Question 7

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

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

Question 8

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

True or False

Question 9

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

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

Question 10

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

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

Answer Key for Self Check

Question 1

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

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

Question 2

The Package Date field on RPAAWRD populates

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

Question 3

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

True

Question 4

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

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

Question 5

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

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

Question 6

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

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

Question 7

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

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

Question 8

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

True

Question 9

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

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

Question 10

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

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

Appendix



Forms Job Aid

Form	Full Name	Use this Form to...
RPROPTS	Packaging Options	select options that control how certain functions in Financial Aid perform.
RTVPGRP	Packaging Group Validation	create packaging groups and establish the priority rules for the group assignment and fund awarding processes.
RTVALGR	Algorithmic Packaging Rule Code Validation	define algorithmic packaging rule codes for use on the Algorithmic Packaging Rules Form (RPRALGR), Packaging Rules Form (RPRPCKR) and Packaging Group Fund Rules Form (RPRGFND).
RPRALGR	Algorithmic Packaging Rules	use algorithmic packaging rules to award funds.
RPRFCAT	Packaging Group Fund Category Maximums Rules	place fund category maximums on packaging groups.
RTVFCAT	Fund Category Validation	define fund categories for use on the Fund Base Data Form (RFRBASE) and Packaging Group Fund Category Maximums Rules Form (RPRFCAT).
RORRULE	Financial Aid Selection Rules	perform a variety of functions based on the rule type.
RPRGFND	Packaging Group Fund Rules	establish fund-specific rules for your packaging group.
RPRDEFR	Default Packaging Rules	set default limits and specifications for gap, equity, and self-help packaging for Financial Aid award packaging.

Form	Full Name	Use this Form to...
RPRPCKR	Packaging Rules	automate GAP, equity, or self help packaging strategies based on packaging groups.
ROIGRPI	Group Inquiry	display group information for all valid group codes and the number of students assigned to each group for the specified aid year and group type.
ROAHSDT	Applicant High School Data	enter the information necessary to establish high school eligibility for the Academic Competitiveness Grant (ACG).
RPICIPC	Financial Aid CIP Code Rules	list eligible programs of study for the SMART Grant.
RPISAHP	State Advanced/Honors Program Codes	list programs defined by the Department of Education as meeting the criteria for a rigorous high school program.
RPRDEGR	Financial Aid Degree Rules	lists degrees that are eligible for ACG and/or SMART Grants
RPRCONT	Third Party Contract Rules	use to define Third Party Contract Estimates
RPREXPT	Exemptions Rules Form	use to define Exemption Estimates
RPAAPMT	Package Maintenance	assign a packaging group to a student manually.
ROARMAN	Record Maintenance	
RPAAWRD	Award Maintenance	
ROAIMMP	Applicant Immediate Process	assign students online.
RTVARSC	Resource Code Validation	define resources.

Form	Full Name	Use this Form to...
RPAMACC	Award Acceptance Mass Entry	enter a large number of applicant award acceptance or rejections or to accept the students entire package with one record.

Terminology

Term	Definition
Award	A financial aid package.
Packaging group	A population of students with similar characteristics.