

Banner Financial Aid Requirements Tracking Training Workbook

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

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Think before you print.

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Introduction



Overview

Workbook goal

The goal of this workbook is to provide you with the knowledge and practice to accurately track students using the various functions in the Banner Requirements Tracking module.

This 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 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
- a minimum working knowledge of SQL for building rules
- administrative rights to create the rules and set the validation codes in Banner.

Features

Features

The Requirements Tracking module provides these features.

Feature	Definition
Requirement Definition	Defines an unlimited number of application requirements.
Grouping of Students	Places students with common application characteristics into groups and assigns the same requirements to all students in the same group.
Mass Entry	Allows entry of information about multiple documents/requirements for multiple students on one screen.
Letter Generation	Provides the ability to print letters to students informing them of the documents/requirements they need to submit or satisfy.

About the process

Following the receipt of a student's need analysis data, the institution begins the requirements tracking process. However, rules and validations must be established before the process can begin.

Note: Assignment of fund-specific tracking documents is addressed in the Banner Funds Management workbook.

Set Up



Overview

Introduction

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

Objectives

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

- identify and describe Banner forms and process used for set up
- create rules and set parameters used to process data
- establish tracking requirements for an applicant record
- write and associate messages with a tracking requirement, for use in tracking letters or web pages
- set up default requirements for a tracking group
- write rules to assign students with common application characteristics to a tracking group.

Establish Tracking Requirements

Purpose

You must establish the documents that students are required to submit to complete their financial aid file.

Description

The Requirements Tracking Validation Form (RTVTREQ) is used to define and maintain standard requirement codes.

The requirement codes represent frequently requested documents or requirements such as

- FAFSA's
- tax returns
- verification worksheets
- loan applications.

You can use these tracking requirement codes on a per student basis, or you can assign one or more tracking requirement codes to a tracking group. You would assign codes to a tracking group to default recurring tracking requirements for student groups with similar needs and backgrounds.

Banner form

The screenshot shows the RTVTREQ 8.0 form with three rows of data. Each row contains fields for Code, Short Description, Long Description, URL, Activity Date, Message Number, and a set of checkboxes for various options.

Code	Short Description	Long Description	Activity Date	Message Number	Options
CSS	CSS Profile	CSS Profile Application	02-OCT-2007	2345	<input type="checkbox"/> Packaging, <input type="checkbox"/> Memo, <input type="checkbox"/> Disbursement, <input type="checkbox"/> Letter Exclusion, <input type="checkbox"/> Perkins MPN, <input checked="" type="checkbox"/> Active, <input type="checkbox"/> Satisfy All, <input type="checkbox"/> Required Once, <input type="checkbox"/> Update Prior Year, <input checked="" type="checkbox"/> Access Indicator, <input checked="" type="checkbox"/> Information Access
CSS05	0405 Profile	2004-2005 CSS Profile Application	23-OCT-2007	3456	<input type="checkbox"/> Packaging, <input type="checkbox"/> Memo, <input type="checkbox"/> Disbursement, <input type="checkbox"/> Letter Exclusion, <input type="checkbox"/> Perkins MPN, <input checked="" type="checkbox"/> Active, <input type="checkbox"/> Satisfy All, <input type="checkbox"/> Required Once, <input type="checkbox"/> Update Prior Year, <input checked="" type="checkbox"/> Access Indicator, <input checked="" type="checkbox"/> Information Access
DEATH	Death Certificate	Copy of parent/spouse death certificate	03-MAR-2004	123445	<input type="checkbox"/> Packaging, <input type="checkbox"/> Memo, <input type="checkbox"/> Disbursement, <input type="checkbox"/> Letter Exclusion, <input type="checkbox"/> Perkins MPN, <input checked="" type="checkbox"/> Active, <input type="checkbox"/> Satisfy All, <input checked="" type="checkbox"/> Required Once, <input checked="" type="checkbox"/> Update Prior Year, <input checked="" type="checkbox"/> Access Indicator, <input checked="" type="checkbox"/> Information Access

Steps

Follow these steps to complete the process.

1. Access the Requirements Tracking Validation Form (RTVTREQ).
2. Perform an **Insert Record** function to create a new row.
3. Enter a requirement code for a document that your institution may need.

Example: *Financial Aid Application—APP.*

4. For this procedure, create a requirement called *REQXX*, where *XX* = your initials. (If someone else in the class has the same initials, expand *XX* to *XXX* to include your middle initial.) Also create a 'Professional Judgment Application' requirement that will be used in a later procedure.
5. Click the **Active** field to allow you to activate this requirements tracking code for all aid years.
6. Establish a short and long description for each requirement code that you create.

Note: The short description is the unique name of the document. The long description is the purpose of the document, which displays on Student Self-Service and may be used in missing item letters. The short description does not display in Student Self-Service.

7. Review the checkboxes for the requirement code.
8. Click the **Required Once** checkbox to indicate that the requirement is needed once during the student's history at your school.

Result: If you satisfy the document in a prior year and you post the document again in the current year, it will be satisfied automatically in the current year with the status and status date used when the requirement was originally satisfied.

9. Click the **Packaging, Disbursement**, and/or **Memo** checkbox to stop that type of processing until the document is satisfied.

Note: You will have options at the fund level to allow selected funds to disregard these settings.

10. Check the **Satisfy All** checkbox if you want to allow updates of all instances of the requirement code at once.

Note: You may satisfy one instance of a requirement on Applicant Requirements Form (RRAAREQ) or the tracking view of Financial Aid Record Maintenance Form (ROARMAN) and then refresh the form (perform the Rollback function) to see all other instances of the requirement as satisfied.

11. Check **Access Indicator** if you want to allow the requirement code to be accessible from the Applicant Summary Form (ROASMRY).

Note: Users in other offices on campus can update requirement codes that are accessible from ROASMRY if they have access to the ROASMRY form.

Note: The **Letter Exclusion** indicator has been added to allow you to exclude the requirement from setting the tracking letter flag when the requirement is added with an unsatisfied status.

12. Check **Information Access** if you want the requirement to be visible on the Self-Service Student Financial Aid pages as either Unsatisfied or Satisfied Requirements.

13. Click the **Perkins MPN** checkbox if a requirement represents a multi-award year Perkins promissory note.

Note: You may not check the **Required Once** field for a Perkins MPN document.

14. Enter a URL to allow the student to download and print the required document from Banner Self Service or to access a web site for applicable action to be taken such as registering with Selective Service.

15. Click the **Save** icon.

16. Click the **Exit** icon.

Establish Requirement Tracking Status Codes

Purpose

The Requirements Tracking Status Validation Form (RTVTRST) is used to define and maintain your own standardized tracking status codes. These status codes provide descriptive information to help you understand why a tracking requirement either has been satisfied or has not been satisfied.

Note: You must define the codes for various statuses that may be assigned to a tracking requirement. Create as many codes as necessary based on your institution's procedures.

Banner form

Requirements Tracking Status Validation RTVTRST 8.0 (s10b80)

Status Code	Description	Satisfied Indicator	Request Letter	VR Message Number	Activity Date
A	Accepted By the Student	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3210	31-JAN-2008
C	Cancelled	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3200	21-OCT-2005
D	Ignored by student	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3201	21-OCT-2005
E	Established	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3201	01-OCT-2005
I	Received Incomplete Returned	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3202	28-MAR-2008
N	Received Not Yet Reviewed	<input type="checkbox"/>	<input type="checkbox"/>	3203	20-OCT-2005
S	Received and Satisfied	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3204	06-OCT-1995
V	Verbal Request	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3201	03-OCT-2005
W	Waived	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3205	06-OCT-1995
X	Accepted Award using Web	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3206	09-JUN-2005

Steps

Follow these steps to complete the process.

1. Access the Requirements Tracking Status Validation Form (RTVTRST).
2. Enter a letter in the **Status Code** field.
3. Enter a description of the code in the **Description** field.
4. Determine whether your status code satisfies the requirement and check the **Satisfied Indicator**. This column indicates whether this particular status code should satisfy the requirement.

Examples: A status of *Waived* should satisfy the requirement. For one reason or another, the requirement code is no longer needed. A status of *Incomplete* should not satisfy the requirement. Something about the requirement code is not complete. Something else needs to be submitted or resubmitted.

Note: Look for the **Satisfied** column on the Applicant Requirement Form (RRAAREQ) later in the procedures.

5. Check the **Request Letter** field if a tracking letter is needed for this requirement.
6. If you are using the SunGard Banner Voice Response System then you will complete the **VR Message Number** column. If not using the Voice Response System, then leave this column empty.
7. Click the **Save** icon.
8. Click the **Exit** icon.

Purpose

The Message Code Validation Form (RTVMESG) permits the maintenance of message-related codes, indicators, and dates. Some requirements need additional explanation when you request them via a letter or Banner Self-Service.

Use the Message Code Validation Form (RTVMESG) to write explanatory text.

Note: This procedure is optional; however, if you complete this procedure, you are required to link the message text to requirements on the Message Rules form (RORMESG). This is covered in the next procedure.

Banner form

The screenshot displays the Message Code Validation RTVMESG 8.0 form. It features two entries, each with a Message Code, Info Access checkbox, Activity Date, and a Text field.

Message Code	Info Access	Activity Date	Text
ADMT	<input type="checkbox"/>	20-MAR-2005	- In order to be eligible for federal student aid, you must first be admitted to a degree program.
AFDC	<input checked="" type="checkbox"/>	22-MAR-2005	- Please provide documentation of your AFDC benefits.

Steps

Follow these steps to complete the process.

1. Access the Message Code Validation Form (RTVMESG).
2. Perform an **Insert Record** function to create a new row.
3. Create a message code to correspond with one of the documents on the Requirements Tracking Validation Form (RTVTREQ).
4. Click the **Info Access** checkbox if this message is to be included for use in Voice Response or Self-Service Student Financial Aid.
5. Enter any text that you wish for the message in the **Text** field.
6. Click the **Save** icon.
7. Click the **Exit** icon.

Link Messages to Requirements

Purpose

The Message Rules form (RORMESG) associates message codes with a tracking requirement code. This allows you to print explanatory messages on letters to further describe the requirement that the student must satisfy or to display messages on Banner Student Self Service.

If you have developed explanations for requirements in letters to students, you will have to link those explanations to their requirements. You will do this on the Message Rules form (RORMESG).

Banner form

The screenshot shows a web browser window titled "Message Rules RORMESG 8.0 (s10b80)". At the top, there are three dropdown menus: "Aid Year" set to "0809", "Type" set to "Tracking", and "Code" set to "ADMIT". Below these is a table with three columns: "Message Code", "Message Description", and "Activity Date". The table has 15 rows, with the first row highlighted in a light green color. A vertical scrollbar is visible on the right side of the table.

Message Code	Message Description	Activity Date

Steps

Follow these steps to complete the process.

1. Access the Message Rules form (RORMESG).
2. Confirm the correct aid year in the **Aid Year** field.
3. Select *Tracking* in the **Type** field to identify the particular set of message records for Requirements Tracking.
4. Select the requirement for which you created the message in the **Code** field.
5. Double-click the **Message Code** field and select the message you created in the previous procedure.
6. Click the **Save** icon.
7. Click the **Exit** icon.

Define Requirement Tracking Groups

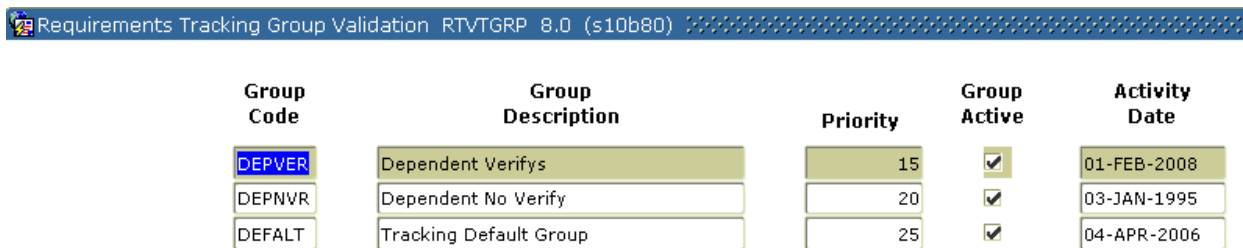
Purpose

The Requirements Tracking Group Validation Form (RTVTGRP) defines and maintains standard tracking group codes. These tracking groups allow you to categorize students with similar characteristics into the same designated groups and control the order in which groups are assigned during the grouping process. Typical groups are verify, non-verify, and those needing special communication such as rejected ISIRs.

Tracking Default Group

The Tracking Default Group delivered with the seed data has a priority that places it at the bottom of the tracking group listing. This group will have no rule. It has been designated on the Institution Options Form (ROAINST) to capture students who do not meet the rules that you write for other tracking groups. If you decide on another code for your default group, you must replace the DEFAULT code on the ROAINST form.

Banner form



Group Code	Group Description	Priority	Group Active	Activity Date
DEPVER	Dependent Verifys	15	<input checked="" type="checkbox"/>	01-FEB-2008
DEPNVR	Dependent No Verify	20	<input checked="" type="checkbox"/>	03-JAN-1995
DEFAULT	Tracking Default Group	25	<input checked="" type="checkbox"/>	04-APR-2006

Steps

Follow the steps to complete the process.

1. Access the Tracking Group Code Validation Form (RTVTGRP).
2. Enter a group using TRKGXX (replace XX with your initials) or devise a code for a group that you would use at your school.
3. Enter a description to identify your group as Tracking Group YYY in the **Group Description** field.

Note: For this procedure, replace the *YYY* with your first name.

4. Enter the tracking group **Priority**. The **Priority** code determines the sequence for assignment of tracking groups during the batch grouping process. The lowest number has the highest priority.
5. Click the **Save** icon.
6. Click the **Exit** icon.

Define Rules for Assigning Students to Tracking Groups

Purpose

The Financial Aid Selection Rules Form (RORRULE) enables you to perform functions based on the rule type that you enter in the **Rule Type** field. Use the RORRULE form to define rules to control the tracking group assignment process.

Note: RORRULE also is used to develop rules to control budget and packaging grouping, fund awarding and disbursement control, and satisfactory academic progress status assignment. The form allows the user to write simple rules where Banner will add the remainder of the sql logic for you, or expert mode rules where the user enters all of the sql logic. After the batch grouping process has been run, you may select a tracking group rule and click the View Students option on RORRULE to display a listing of students assigned to a particular group.

Banner form

Financial Aid Selection Rules RORRULE 8.0 (s10b80)

Rule Type: T=Requirements Tracking Group

Aid Year: 0809 2008-2009 aid year

Group Code: DEPVER Dependent Verifys Active

Fund Code:

Selection Criteria

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

Table Name	Column Name	Operator	Value

Copy To Rule Active

Steps

Follow these steps to complete the process.

1. Access the Financial Aid Selection Rules Form (RORRULE).
2. Click **Rule Type** to view all possible rule types.
3. Select **Requirements Tracking Group** from the list.
4. Enter your practice year in the **Aid Year** field.
5. Select the group code that you created earlier in the **Group Code** field.
6. Leave the **Fund Code** field blank for this procedure.

Note: The **Fund Code** field is utilized with other rule types. The rule type specified in the **Rule Type** field will determine if the **Fund Code** field is enabled.

7. Use the rules below as models for rules for your verify and non-verify groups:

Dependent Verify

- RCRAPP2_MODEL_CDE = 'D'
- AND (RCRAPP1_VERIFICATION_MSG = '1'
- OR RCRAPP1_VERIFICATION_MSG IS NULL)
- AND RCRAPP1_CURR_REC_IND = 'Y'

Independent Non-Verify

- RCRAPP2_MODEL_CDE = 'I'
- AND (RCRAPP1_VERIFICATION_MSG = '2'
- OR RCRAPP1_VERIFICATION_MSG IS NULL)
- AND RCRAPP1_CURR_REC_IND = 'Y'

Note: Your instructor will provide directions for basic rule construction. See Banner form on previous page for example.

8. Click the **Save** icon.

9. Select **Compile Rule** from the **Options** menu to compile your rule.

Result: Banner adds logic to complete the remainder of the sql select statement for you when you write simple rules. Select **Compiled/Expert SQL Code** from the **Options** menu to view the entire Select statement.

Caution: Do not edit the rule and click the **Save** icon while in this view or Banner will retain your rule in the expert mode.

10. Select **Execute Group** from the **Options** menu to test your rule for errors.

Result: The Selected Students window will open and:

- display a listing of students who meet the criteria of your rule *OR*
- will be blank with the AutoHint message 'Press Exit to close window' if your rule is correct, but no students meet the rule *OR*
- will display 'Oracle Error' in the AutoHint line or may display a listing that includes non-person records if your rule is not written correctly. Your instructor will help you resolve errors.

11. Click the **Close** button.

12. Click the **Exit** icon.

Result: The rule that you created compiles when you exit.

Define Requirements to be Assigned to Groups

Purpose

Use the Requirements Tracking Group/Requirements Rules Form (RRRGREQ) to identify the set of requirements that you want to assign to students in a particular tracking group for a specified aid year.

You now need to enter documents to be assigned to members of each group. You can do this on the Requirements Tracking Group/Requirements Rule Form (RRRGREQ).

Default statuses can be set on Requirements Tracking Group/Requirements Rules Form (RRRGREQ) for each document with regard to requirements for Packaging, Memos, and Disbursement.

Banner form

The screenshot shows a web browser window titled "Requirements Tracking Group/Requirements Rules RRRGREQ 8.0 (s10b80)". The form includes the following fields:

- Aid Year:** 0809
- Tracking Group:** DEPVER (Dependent Verifys)

Tracking Group Requirements Rules

Requirement Code	Code Description	Required for Packaging	Required for Memo	Required for Disbursement
FAFSA	Federal Student Financial Aid Application	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SCTAPP	SCT Institute of Technology Financial Aid Application	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
TAXP05	Signed Copy of Parent's tax return for 2005	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
TAXS05	Signed copy of Student/Spouse tax returns for 2005	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
VERIFY	Federal Verification Worksheet	<input type="checkbox"/>	<input type="checkbox"/>	<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"/>	<input type="checkbox"/>

Copy To

Aid Year: **Tracking Group:**

Steps

Follow these steps to complete the process.

1. Access the Requirements Tracking Group/Requirements Rules Form (RRRGREQ).
2. Check to make sure that the code in the **Aid Year** field is the aid year that you are working with.
3. Enter the tracking group code that you created on Tracking Group Code Validation Form (RTVTGRP) in the **Tracking Group** field.
4. Enter the requirement codes to be assigned to all students in this group in the **Requirement Code** field.

Example: If your group is dealing with dependent students selected for verification, then you should assign the group the Parent Tax Return requirement code. Students in the independent group will not need this requirement.

5. Review all of the tracking requirements assigned to your group in the **Required For Packaging** fields.

Note: These fields allow you to change the 'Required for' settings for selected documents within a particular group without changing the settings on the master document on the Requirements Tracking Validation Form (RTVTREQ).

Example: Your institution may require that a tax return is required before packaging for continuing students. At the same time, you cannot hold up packaging for new students by waiting for a tax return because of the institution's target date for mailing award letters to potential freshmen. The tax returns could show as required for packaging on Requirements Tracking Validation Form (RTVTREQ), but you can update the requirement to require them for disbursement for new students on Requirements Tracking Group/Requirements Rules Form (RRRGREQ). Ask your instructor for clarification if necessary.

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

Establish Global Tracking Values

Purpose

The Institution Financial Aid Options Form (ROAINST) includes global options for the Banner Financial Aid System.

You can select a Tracking Requirement Status Code that will default as the initial status of tracking requirements that are assigned manually or through batch grouping. You also will designate one tracking group to capture students who do not meet any of the defined tracking group rules.

Banner form

The screenshot shows the Banner ROAINST 8.3 Options form. The 'Aid Year' is set to 0910. The 'Options' tab is selected. The 'Tracking Established Status' field is highlighted with a red box and contains the value 'E'. Other fields include Current Term Code (200910), Default Aid Period (FA/SPR), Initial SAP Status (X), Initial SAP Term Code (200910), Exception SAP Status (B), Budgeting Group (UGINON), Packaging Group (ONFRSH), Tracking Group (INDVPR), Methodology (F=Federal), Primary Application Source (EDE), Application Received Date (C=Date Created), Source for Application Received Date, Application Requirement Code, and Message Expiration Days. There are also checkboxes for International, Create Applicant Non Year User-Defined Data, Create Applicant User-Defined Data, and Rescheduled Disbursement Date.

Steps

Follow these steps to complete the process.

1. Access the Institution Financial Aid Options Form (ROAINST).
2. Select the **Options** tab.
3. Enter a status that means 'required' in the **Tracking Established Status** field.

Result: This status will be used as the default when requirements are added manually or via batch posting.

4. Review the DEFAULT seed data status in the **Tracking Group** field.

Note: Update this status if you created a different code for the tracking default group.

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

Batch Post a Requirement Code

Purpose

Batch post a requirement code to a group of students.

Note: You may use this feature to request documents to resolve federal comment and reject codes if you enter appropriate values in the ISIR Type and ISIR Value fields shown below on the Batch Posting Rules Form (RORPOST). Your instructor can explain this functionality.

Example

Several students have submitted Professional Judgment Application forms. It is your policy to record those on the student requirements tracking record. You have decided to use batch posting to record the applications.

Population Selection Definition Rules Form (GLRSLCT)

The screenshot shows a web browser window titled "Population Selection Definition Rules - GLRSLCT 8.1 (s10b80)". The form contains the following sections:

- Application:** FINAID (dropdown)
- Selection ID:** AB_PLUS (dropdown)
- Creator ID:** ABRYANT (text input)
- Selection Description:** Plus outstanding principle (text input). Includes checkboxes for Manual, Locked, Delete, and Application Level Rules Exist.
- Definition:** Select: RCR LDS4_PIDM (text input), From: RCR LDS4 (text input).
- Rules:** A table with columns: '(', Data Element (dropdown), Operator (dropdown), Value (dropdown), ')', and AND / OR (dropdown). The table has 10 rows for defining rules.

Procedure

As an administrator you will need to set up the forms associated with batch posting a requirement code so that the staff members can complete the process.

Warning: The forms must be completed in the order below.

You will need to set up these two forms.

1. Population Selection Definition Rules Form (GLRSLCT).
2. Batch Posting Rules Form (RORPOST).

Banner Form

The screenshot shows the 'Population Selection Definition Rules' form for GLRSLCT 8.1. The form is titled 'Population Selection Definition Rules GLRSLCT 8.1 (s10b80)'. It contains the following sections:

- Application:** FINAID (dropdown)
- Selection ID:** AB_PLUS (dropdown)
- Creator ID:** ABRYANT (text field)
- Selection Description:** Plus outstanding principle (text field)
- Options:** Manual, Locked, Delete, Application Level Rules Exist
- Definition:**
 - Select:** RCRLDS4_PIDM (text field)
 - From:** RCRLDS4 (text field)
- Rules:** A table with columns: '(', Data Element (dropdown), Operator (dropdown), Value (dropdown), ')', and AND / OR (dropdown). The table has 10 rows for defining rules.

Steps: Form 1

Follow these steps to complete the process.

1. Access the Population Selection Definitions Rules form (GLRSLCT).
2. Enter *FINAID* in the **Application** field.
3. Enter MANUAL_XXX in the **Selection ID** field, where *XXX* = your initials.
4. Navigate to the **Description** field and enter a description for your Selection ID.
5. Click the **Save** icon.
6. Click the **Exit** icon.

Steps: Form 2

Follow these steps to complete the process.

1. Access the Batch Posting Rules Form (RORPOST).
 2. Perform an **Insert Record** function.
- Note: Your user ID defaults in the Creator ID field.
3. Enter the applicable category in the **Category** field.
 4. Enter *FINAID* in the **Application Code** field.
 5. Enter the name of the Selection ID that you created (MANUAL_XXX) in the **Selection ID** field.
 6. Enter your user ID in the **User ID** field.
 7. Enter *R* for Requirement Code/Status in the **Type Indicator** field.

Note: You are telling the system to batch post a tracking requirement and status for a specified population selection. There also is a batch posting type of *RF*, which allows you to post fund-specific documents and *PT* (for Preparatory or Teacher Certification). *FS* Batch Posting type allows awards to be cancelled, declined, or accepted in their entirety.

8. Enter the requirement code for your professional judgment document in the **Code**

to Post field.

Example: *FARM* for Farm Assets.

9. Skip the **Amount to Post** field.

Note: This form is used for all batch posting rules. Requirement codes do not have an amount, but many other batch posting codes do.

10. Scroll to the right to view remaining fields.

11. Enter a tracking status code that means 'Satisfied' in the **Status or Term Code** field.

12. Click the **Use Indicator** checkbox at the beginning of the row.

Result: Your batch posting will be included the next time the RORBPST Batch Posting Process is run.

13. Click the **Save** icon.

14. Click the **Exit** icon.

Self Check

Question 1

The Message Code Validation Form (RTVMESG) permits the maintenance of message-related codes, indicators, and dates.

True or False

Question 2

Which field on RTVTREQ determines if the requirement code is accessible from the Applicant Summary Form (ROASMRY) and potentially may be updated by other offices on campus?

- a. Info Access
- b. Priority
- c. Access Ind

Question 3

The difference between the short description and the long description on RTVTREQ is that the short description explains the purpose of the document and the long description is the unique name of the document.

True or False

Question 4

Which of the following forms is used to define tracking group assignment rules?

- a. Tracking Group Code Validation Form (RTVTGRP)
- b. Financial Aid Selection Rules (RORRULE)
- c. Requirements Tracking Validation Form (RTVTREQ)

Question 5

To query and review a requirement that you have created you would access the Requirements Tracking Validation Form (RTVTREQ).

True or False

Question 6

What does the **Priority** field on the Requirements Tracking Group Validation Form (RTVTGRP) control?

- a. The numbers of groups of students who require the same set of documents/requirements.
- b. Whether the tracking code is required and must be satisfied for packaging.
- c. The order in which groups are assigned during the grouping process.

Question 7

The Message Code Validation Form (RTVMESG) allows you to associate a message code with a requirement code.

True or False

Answer Key for Self Check

Question 1

The Message Code Validation Form (RTVMESG) permits the maintenance of message-related codes, indicators, and dates.

True

Question 2

Which field on RTVTREQ determines if the requirement code is accessible from the Applicant Summary Form (ROASMRY) and potentially may be updated by other offices on campus?

- a. Info Access
- b. Priority
- c. Access Ind**

Question 3

The difference between the short description and the long description on RTVTREQ is that the short description explains the purpose of the document and the long description is the unique name of the document.

False; The short description is the unique name of the document. The long description is the purpose of the document.

Question 4

Which of the following forms is used to define tracking group assignment rules?

- a. Tracking Group Code Validation Form (RTVTGRP)
- b. Financial Aid Selection Rules (RORRULE)**
- c. Requirements Tracking Validation Form (RTVTREQ)

Question 5

To query and review a requirement that you have created you would access the Requirements Tracking Validation Form (RTVTREQ).

True

Question 6

What does the **Priority** field on the Requirements Tracking Group Validation Form (RTVTGRP) control?

- a. The numbers of groups of students who require the same set of documents/requirements.
- b. Whether the tracking code is required and must be satisfied for packaging.
- c. **The order in which groups are assigned during the grouping process.**

Question 7

The Message Code Validation Form (RTVMESG) allows you to associate a message code with a requirement code.

False; The Message Code Validation Form (RTVMESG) permits the maintenance of message related codes, indicators and dates.

Day-to-Day



Overview

Introduction

The purpose of this section is to explain the day-to-day or operational procedures for requirements tracking.

Objectives

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

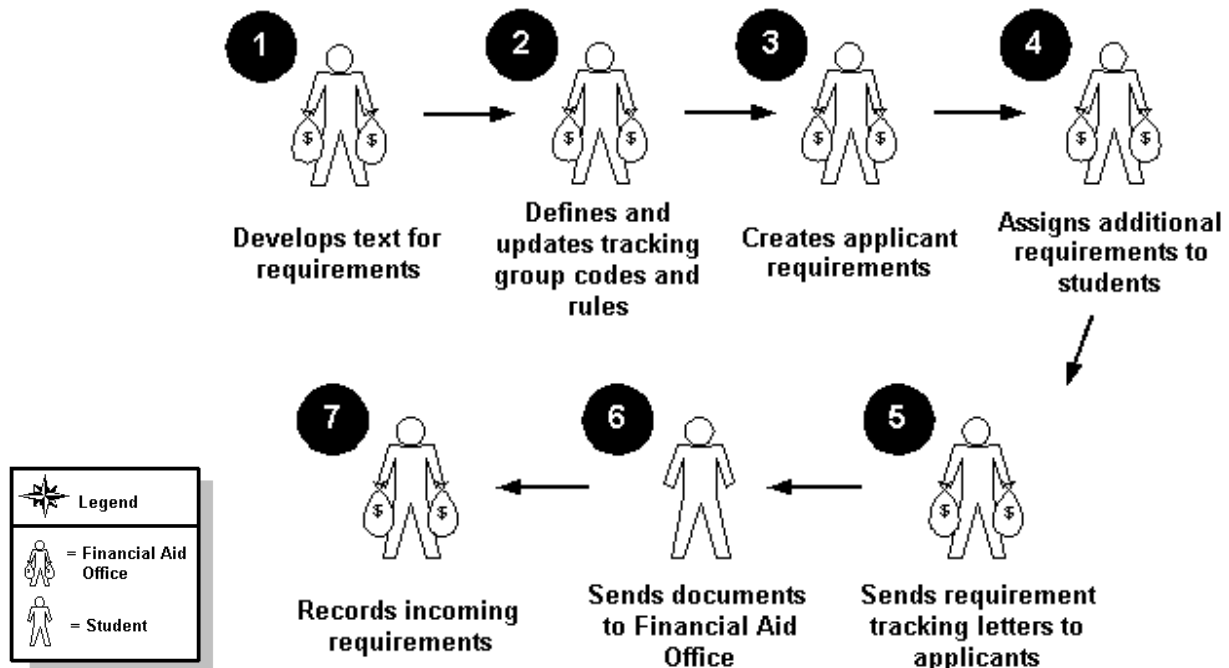
- assign a student to a tracking group automatically online, manually, or in batch
- record receipt of required documents through individual and mass input.

Process Introduction

About the process

As student need analysis data is received, the institution must satisfy the Federal requirements to verify or confirm data as well as to identify and satisfy the accuracy of the most error prone data for their students. This may be accomplished by assigning tracking requirements, sending tracking letters, or having students access the Self-Service Student Financial Aid pages. Once the students return the required documents, then receipt must be confirmed and follow-up procedures instituted.

Process flow



What happens

Tracking Requirements are assigned using automated processes, as well as manual, and upon receipt of documents, the status of the applicable requirements must be updated to impact the follow-up as well as file review procedures.

Assign a Student to a Requirement Tracking Group

Purpose

Requirement tracking groups need to be assigned and changed for students whose records you have created.

Approaches

There are five ways to assign documents to students. You may use any of these processes.

Form	Process
Applicant Requirements (RRAAREQ)	Manually assign requirements and/or manually assign a tracking group.
Financial Aid Record Maintenance (ROARMAN)	Manually assign requirements and/or manually assign a tracking group.
Applicant Immediate Process (ROAIMMP)	Automatically assign requirements to one student at a time.
Batch Automatic Grouping Process (RORGRPS)	Batch assignment of tracking groups and requirements to students.
Batch Posting Process (RORBPST)	Batch posting to assign tracking requirements to selected students without regard to their tracking group assignment

Note: Running the Batch Automatic Grouping Process and the Online Group Assignment Process can change the assignment of a previously grouped record if the record meets the assignment criteria for another group. Tracking group changes log in Banner and are visible on the Applicant Data Log Form (ROIALOG).

Applicant Requirements Form (RRAAREQ)

Steps 1

Follow these steps to complete the form and manually assign a student to a tracking group.

1. Access the Applicant Requirements Form (RRAAREQ).
2. Select the **ID** number of one of your practice students.
3. Perform a **Next Block** function.
4. Double-click in the **Tracking Group** field and select a group code that has documents associated with it.

Note: Notice the form name at the top of the box. This opens a list of values from the Tracking Group Validation Form (RTVTGRP) that you worked on previously.

5. Click **Create Requirement** to insert default requirements.
6. Click the **Save** icon.
7. Navigate to the Requirements block.
8. Review the requirements you established.

Financial Aid Record Maintenance Form (ROARMAN)

Financial Aid Record Maintenance ROARMAN 8.1 (s10b80)

Aid Year: 0809 ID: 510000001 Mr. Matthew Lee Allen, Jr.

Summary

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

Steps 2

Follow these steps to complete the form to manually assign requirements.

Note: Requirements may be added manually using the RRAAREQ form. This procedure introduces the ROARMAN form.

1. Access the Financial Aid Record Maintenance Form (ROARMAN).
2. Select the **ID** number of a student.
3. Perform the **Next Block** function.
4. Click the search icon next to the **Tracking** field to navigate to the Applicant Requirements form (RRAAREQ).
5. Click the **Next Block** icon.
6. Double-click in the **Requirement** field to select a requirement code from the Requirements Tracking Validation Form (RTVTREQ) by double-clicking on a requirement code from the list.
7. Enter a requirement status code in the **Status** field if you wish to override the default value. The tracking status established in ROAINST defaults into the **Status** field.
8. Select a requirement status code from the list by double-clicking.
9. Click the **Save** icon.

Online Group Assignment Process from the Applicant Immediate Process Form (ROAIMMP)

Applicant Immediate Process ROAIMMP 8.1 (s10b80)

Aid Year: 0809 ID: 510000001 Mr. Matthew Lee Allen, Jr.

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

Letter Generation

Letter Code:

Term Code:

Wait Days:

Initial Code:

Steps 3

Automatically assign requirements to one student at a time by running the Online Group Assignment Process from the Applicant Immediate Process Form (ROAIMMP). The Immediate Tracking option initiates the grouping process for the student ID entered in the Keyblock.

Follow these steps to complete the form.

1. Access the Applicant Requirements Form (RRAAREQ).
2. Enter the ID of one of your practice students.
3. Perform a **Next Block** function.
4. Select **Assign Tracking Group** from the **Options** list.

Result: This opens the Applicant Immediate Process Form (ROAIMMP).

5. Select **(I)mmediate** from the **Action Indicator** drop-down menu in the **Tracking Group Assignment** field.
6. Click in the **Term** field.

Result: The current term entered on the ROAINST form will default into this field.

7. Click the **Save** icon.

Note: Watch the Auto Hint line for results.

8. Click the **Exit** icon.

Result: This will take you back to the Applicant Requirements Form (RRAAREQ).

9. Review the tracking group and requirements assigned to this student.

Batch Automatic Grouping Process (RORGRPS)

Process Submission Controls GJAPCTL 8.0 (s10b80)

Process: RORGRPS Automatic Group Assignment Parameter Set:

Printer Control

Printer: Special Print: Lines: Submit Time:

Parameter Values

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

LENGTH: 4 TYPE: Character O/R: Required M/S: Single
Valid/Active Aid Year Code

Submission

Save Parameter Set as Name: Description: Hold Submit

Steps 4

Batch assign tracking groups and requirements to students. Of all of the processes to assign documents to students, RORGRPS is the most efficient of the options. Follow these steps to complete the process.

1. Access the Process Submissions Controls form with RORGRPS in context by entering RORGRPS in the Direct Access field.
2. Enter a valid printer in the **Printer** field or double-click in the **Printer** field to display a list of printers that are available.

Note: If a valid printer has not been established enter DATABASE as the printer name.

3. Review the Parameter Values block.

Note: There are seven possible parameters for this job. Some of these are optional. Notice the scroll bar to the right of the block. It allows you to scroll through the parameters. Notice that the descriptions of the parameters are grayed out. This means that you cannot enter data in that column.

Note: If you use population selection to control the RORGRPS process, you must run the population selection to generate a listing of students first.

4. Enter the values for the parameters of the job.

Req	Parameter	Description
✓	Group Type Indicator	Enter T for Tracking Group assignments.
✓	Aid Year Code	Enter the aid year that you have been using for practice.
	Term Code	Enter the applicable term code from STVTERM that is within this aid year. (This is no longer an optional parameter for the RORGRPS process).
	Use All Applicants Indicator	Select <i>Y</i> to select all students with a RORSTAT record if not using a population selection.
	Selection Identifier	Skip – This could be used to enter the name of a Population Selection.
	Application Code	Skip – This could be used to enter the Application area (FINAID) for which the Population Selection was written.
	Creator ID of Selection ID	Skip – Enter the User ID of the person who created the

Population Selection.

User ID

Skip-Enter the User ID of the person who ran GLBDATA for the population selection

5. Click the **Save Parameters Set as** checkbox.

Result: The parameter values that you selected for this run of **RORGRPS** will be visible the next time that you sign on with the same user name and run the **RORGRPS** process.

6. Click **Submit**.
7. Click the **Save** icon.
8. Click **OK** to acknowledge the alert box that informs you that your values are being saved as user parameters.
9. Click the **Exit** icon.

Result: You have just run the Batch Automatic Grouping process. Your report is now printed.

Display Requirements Tracking Group Information

Purpose

Use the Group Inquiry Form (ROIGRPI) to display tracking group codes and the number of students assigned to each group for a specified aid year.

This form also shows if group assignment rules currently exist for the tracking group code.

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

Banner form

Group Inquiry ROIGRPI 8.0 (s10b80)

Aid Year: 0809 2008-2009 aid year Group Type: Tracking

Term:

Code	Description	Group Active	Group Priority	Award Priority	Rules Exist	Rules Active	Information Access	Student Count	Activity Date
DEB1	Deb's First Test Group	<input checked="" type="checkbox"/>	1		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12	26-MAR-2008
CSTGRP	Carolyn Tracking Group	<input checked="" type="checkbox"/>	1		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	22-OCT-2007
VSPATI	Veerendra	<input checked="" type="checkbox"/>	2		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	29-JAN-2008
BOB	Bob's Inactive Tracking Group	<input checked="" type="checkbox"/>	2		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	05-NOV-2007
TEST	Mark's default test	<input checked="" type="checkbox"/>	5		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	05-MAR-2008
INDVER	Independent Verify	<input checked="" type="checkbox"/>	5		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	03-JAN-1995
CSIACT	Carolyn Inactive Tracking Grp	<input type="checkbox"/>	7		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	30-OCT-2007
INDNVR	Independent No Verify	<input type="checkbox"/>	10		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	29-NOV-2007
JON	Jon's Tracking req group	<input checked="" type="checkbox"/>	12		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	15-MAY-2006
DEPVER	Dependent Verifys	<input checked="" type="checkbox"/>	15		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	734	01-FEB-2008
DEPNVR	Dependent No Verify	<input checked="" type="checkbox"/>	20		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	03-JAN-1995
DEFAULT	Tracking Default Group	<input checked="" type="checkbox"/>	25		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	04-APR-2006
PNN	Phong's Group	<input checked="" type="checkbox"/>	30		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	20-SEP-2005
WILL1	Will's Test Group	<input checked="" type="checkbox"/>	90		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	15-APR-2004
ANGIEB	Angela's Test group	<input type="checkbox"/>	100		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	29-NOV-2007
CTG1	Cass's test group	<input checked="" type="checkbox"/>	100		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	01-DEC-2005

Student Count ==> Total: 751 Query: 748

Steps

Follow these steps to complete the process.

1. Access the Group Inquiry Form (ROIGRPI).
2. Confirm the correct aid year in the Key block.
3. Select the group type to specify the type of information to be displayed in the form in the **Group Type** field.
4. The **Term** field is valid only when the Group Type is SAP.
5. Review the remaining fields. The table contains descriptions of the remaining fields.
 - **Description:** Group code and description for the Group type and Aid Year in the Key block.
 - **Group Active:** allows you to see if a budgeting group is active or inactive for all aid years.
 - **Group Priority:** Displays the priorities defined in RTVTGRP.
 - **Award Priority:** This field is related to the Packaging Group type. It will be null for the Tracking group type.
 - **Rules Exist:** budgeting group assignment rules exist.
 - **Rules Active:** view when budgeting group rules exist and are active.
 - **Information Access:** This field is related to the Packaging Group type. It will be null for the Tracking group type.
 - **Student Count:** Indicates a total of how many students 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.
6. Click the **Exit** icon.

Record Incoming Requirements in Bulk

Scenario

You are a financial aid clerk at your institution. One of your duties is to open incoming mail and enter the information into Banner. One procedure in this process is to place all parent and student tax returns in a pile and then enter them one at a time.

You use the Applicant Requirements Mass Entry Form (RRAMASS) to accomplish this task.

Banner form

The screenshot shows the 'Applicant Requirements Mass Entry RRAMASS 8.1 (s10b80)' window. At the top, there are two fields: 'Aid Year:' with a dropdown menu showing '0809' and '2008-2009 aid year', and 'Status Date:' with an empty text box and a calendar icon. Below these is a table with six columns: 'Student ID', 'Student Name', 'Requirement Code', 'Fund Code', 'Status Code', and 'Status Date'. Each column has a dropdown menu above it. The table contains 15 empty rows for data entry. A vertical scrollbar is visible on the right side of the table.

Steps

Follow these steps to complete the process.

1. Access the Applicant Requirements Mass Entry Form (RRAMASS).
2. Confirm that the correct aid year is in the **Aid Year** field.
3. Enter the date that you wish recorded in the **Status Date** field for these requirements. This is an optional field.
4. Enter a student ID in the **Student ID** field.
5. Double-click in the **Requirement Code** field and select the requirement for student tax return.
6. Enter the status that you wish these requirements to be set in the **Status Code** field.

Example: *S* = Satisfied

7. Click the **Save** icon.
8. Select **Duplicate Record** from the **Record** menu.

Result: This duplicates the record that you just entered.

9. Select a different student ID to enter in the **Student ID** field.

Note: You can use the **Duplicate Record** option many times to enter the same requirement code for multiple students.

Note: This form also could be used to enter multiple requirements for the same student. The process would be the same as it is above, except instead of entering different IDs you would enter different requirement codes.

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

Record Incoming Requirements for a Single Student

Purpose

Use either of these two forms to record incoming documents for a single student.

1. Applicant Requirements Form (RRAAREQ)
2. Financial Aid Record Maintenance Form (ROARMAN)

Applicant Requirements Form (RRAAREQ)

Applicant Requirements RRAAREQ 8.1 (s10b80)

Aid Year: 0809 ID: 510000001 Mr. Matthew Lee Allen, Jr. Create Person

Applicant Requirements | Perkins MPN Detail | Additional Requirements

Summary

Tracking Group:

Request Letter Additional Requirements All Requirements Complete:

Lock Group Holds exist Packaging Requirements Complete:

Disbursement Requirements Complete:

Requirements

Requirement	Status	Status Date	Established Date	Satisfied	SBGI	Perkins MPN	Packaging	Memo	Disbursement	Letter	Fund	System

SBGI Description:

Steps 1

Follow these steps to complete the process.

1. Access the Applicant Requirements Form (RRAAREQ).
2. Enter the **ID** number of a practice student.
3. Double-click the **Status** field and select a value with a Satisfied status by double-clicking the **Status Code**.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Financial Aid Record Maintenance Form (ROARMAN)

Steps 2

Follow these steps to complete the process.

1. Access the Financial Aid Record Maintenance Form (ROARMAN).
2. Select the **ID** number of a student.
3. Perform a **Next Block** function.
4. Click the **Tracking** search icon to navigate to the Applicant Requirements Form (RRAAREQ).
5. Double click the **Status** field and select a status code that means 'Satisfied.'
6. Click the **Save** icon.
7. Click the **Exit** icon.

Review the Applicant Requirements Report

Purpose

The Applicant Requirements Report (RRRAREQ) gives you detailed information on each applicant's tracking requirements. It has a variety of parameter options for structuring the report and allows the use of population selection.

Banner form

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

- Process:** A dropdown menu set to "RRRAREQ" and a text field containing "Applicant Requirements Report".
- Parameter Set:** A dropdown menu.
- Printer Control:** A "Printer:" dropdown menu, 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. The "Values" column has a dropdown menu. The table contains 8 rows of data:

Number	Parameters	Values
01	Selection Identifier	
02	Application Code	
03	Aid Year Code	
04	Term Code	
05	Tracking Group Code	
06	Requirement Code	
07	Status Code	
08	Satisfied Indicator	N
- Submission:** A checkbox for "Save Parameter Set as", a "Name:" text field, a "Description:" text field, a radio button for "Hold", and a radio button for "Submit".

Below the table, there is a note: "LENGTH: 30 TYPE: Character O/R: Optional M/S: Single Code that identifies the sub-population to work with."

Steps

Follow these steps to complete the process.

1. Access the Process Submissions Controls form (RRRAREQ).
2. Enter a valid printer in the **Printer** field or double-click in the **Printer** field to display a list of printers that are available.

Note: If a valid printer has not been established enter DATABASE as the printer

name.

3. Review the Parameter Values block.

Note: There are fourteen possible parameters for this job. Some of these are optional. Notice the scroll bar to the right of the block. It allows you to scroll through the parameters. Notice that the descriptions of the parameters are grayed out. This means that you cannot enter data in that column.

4. Navigate to the **Values** column.
5. Enter the values for the parameters of the job using the table that follows.

Parameters

Use the table to complete the parameters.

Req	Parameter	Description
	Selection ID	Skip – Optional, but must be entered if using population selection.
	Application Code	Skip – Optional, enter Application that houses the Selection ID.
✓	Aid Year Code	Enter your practice aid year code.
✓	Term Code	Enter the term code from the Current Term field on the ROAINST form.
	Tracking Group Code	Click the values icon and select a group that had a count in the previous ROIGRPI procedure.
	Requirement Code	Skip – Used instead of population selection for a particular requirement code you wish to review. <u>Example</u> : 2003 Student Tax Return
	Status Code	Skip – Used instead of population selection to review all requirements in a particular status. <u>Example</u> : Received Incomplete
	Satisfied Indicator	Skip – Used instead of population selection to review all requirements that are in a status that completes the requirement. <u>Example</u> : Received and Satisfied, Cancelled, Waived

	Packaging Req. Indicator	Skip – Used instead of population selection to review all requirements required for packaging.
	Disbursement Req. Indicator	Skip – Used instead of population selection to review all requirements required for disbursement.
	Fund Requirement Indicator	Skip – Used instead of population selection to review all requirements posted as the result of a fund being awarded.
	Page break after applicant	Enter N for No. Indicates that you want to insert a page break after reported data for each applicant.
	Creator of Selection ID	Skip – Optional, enter the Creator ID of the person that created the population selection.
	User ID	Skip – Optional, enter the User ID of the person who ran the population selection for this run of the report.
	Applicant Letter Indicator	Applicant Letter Indicator – Ability to set the letter indicator
	Requirement Letter Indicator	Leave blank, can enter Y or N in this field.
	Set Letter Indicator	Set Letter Indicator – Ability to set the letter indicator

6. Click the **Save Parameters Set** as checkbox.

Result: This causes Banner to display your parameter choices from this run the next time you run the RRRAREQ Report.

7. Click **Submit**.

8. Click the **Save** icon.

Result: This causes Banner to run the RRRAREQ Report. You get a sequence number on the Auto Hint line at the bottom of the form. Your report is now printed.

9. Click the **Exit** icon.

Update, Add, or Remove Requirements

Purpose

The students at your institution have submitted the requested documents to complete their financial aid files. Upon reviewing these documents, you find that some are acceptable or complete and some raise questions that require additional documentation.

Applicant Requirements (RRAAREQ)

The screenshot shows the 'Applicant Requirements' window for RRAAREQ 8.1. The window title is 'Applicant Requirements RRAAREQ 8.1 (s10b80)'. At the top, there are fields for 'Aid Year' (0809), 'ID' (510000001), and the applicant's name (Mr. Matthew Lee Allen, Jr.), along with a 'Create Person' button. Below this are three tabs: 'Applicant Requirements' (selected), 'Perkins MPN Detail', and 'Additional Requirements'.

The 'Summary' section contains several controls:

- Tracking Group: []
- Request Letter
- Lock Group
- Create Requirement
- Additional Requirements
- Holds exist
- Delete Requirement
- All Requirements Complete: []
- Packaging Requirements Complete: []
- Disbursement Requirements Complete: []

The 'Requirements' section features a table with the following columns: Requirement, Status, Status Date, Established Date, Satisfied, SBGI, Perkins MPN, Packaging, Memo, Disbursement, Letter, Fund, and System. The table contains 8 rows of empty data fields. Below the table is an 'SBGI Description:' label.

Steps 1

Follow these steps to view a student's Applicant Requirement Form (RRAAREQ).

1. Access the Applicant Requirements Form (RRAAREQ).
2. Enter the **ID** number of one of your practice students.
3. Perform a **Next Block** function.
4. Review the requirement codes that exist for this student.
5. View the **System** field.

Note: There are four possible values that can display in this field.

Value	Meaning
S	System generated
B	Assigned in batch
M	Assigned manually by a user
F	Assigned by the awarding of a fund

The **System** field of the student you are working with should contain an S (System Generated) in this column for two reasons;

- a. you inserted a group that caused the system to default in requirements
- b. you assigned the student to a group automatically which caused the system to default in requirements.

Note: Banner can replace unsatisfied, system-generated S requirements during the batch grouping process if a student is selected into a different tracking group.

Steps 2

In this procedure, you need to add a requirement to a student record and update an existing requirement. A student has submitted a Federal W-2 form with her 1040 tax form. Follow these steps to complete the procedure.

1. Access the Applicant Requirements Form (RRAAREQ).
2. Double-click in a blank **Requirement** field and select a requirement code to add to this student.

Result: Notice that the **System** field shows an *M* for manual.

3. Double-click the **Status** field and select the status that shows that this document has been received and satisfied.

Result: Notice the **Satisfied** field is updated to *Y*.

4. Move to an existing requirement code and change the **Status** field to show that the document was received incomplete.

Result: Notice that the **Satisfied** field remains at *N*.

5. Review all of the requirement codes that are posted for this student and determine what requirement codes are required for the disbursement process. Satisfy all of those requirements.
6. Click the **Save** icon.

Results: The current date displays in the **Disbursement Requirements Complete** field when you satisfy all of the requirements needed for disbursement.

7. Notice the **Additional Requirements** and the **Holds exist** fields in the Tracking Group Information block.
8. The **Holds exist** field indicates whether a student has financial aid holds in the Applicants Holds form (ROAHOLD).
9. Click the **Exit** icon.

Steps 3

In this procedure, a student has come to you to request a Dependency Override. After counseling the student, you decide to process the override. The student has been working with his priest because of his difficult situation at home. You need a letter from his priest to verify what you have discussed. Follow these steps to complete the procedure.

1. Access the Applicant Requirements Form (RRAAREQ).
2. Select **Applicant Status [ROASTAT]** from the **Options** menu.
3. Review the status in the **Holds exist** field.
4. Click the **Exit** icon to return to the Applicant Requirements Form (RRAAREQ).
5. Review the following fields in the Tracking Group Information window:
 - A code of Y will appear in the **Additional Requirements** field if there are additional requirements listed on the second page of RRAAREQ. Non-coded requirements can track something that is not used frequently enough to warrant creating a standard requirement.
 - A Y code will appear in the **Holds exist** field if the student has holds on the RORSTAT record.
 - The **Request Letter** field will be checked automatically as unsatisfied requirements are added to the student's tracking record. You may use this indicator to select students for requirements tracking letters.
 - Click the **Group Lock** field to prevent Banner from changing the current tracking group during manual, on-line, or batch tracking grouping.
6. Take notice of the following.
 - The **Holds exist** field in the Applicant Processing Status block.
 - The three date fields for completed requirements display on ROASTAT, just as they do on RRAAREQ.

Note: After viewing this, return to RRAAREQ.

- The **Additional Requirements** indicates that there are additional tracking requirements listed on the second page of RRAAREQ. The requirement could be either a promissory note connected with a loan or an additional non-coded requirement added by a user. Non-coded requirements can track something that is not used frequently enough to warrant creating a standard requirement. This block should be used for unique situations.

7. Click the **Create Requirement** icon.
8. Enter a description for the requirement in the **Requirement Description** field.
9. Click the **Save** icon.
10. Perform a **Rollback** function to return to the Key block.
11. Query the form again.

Result: Notice that the Additional Requirement field is now set to *Y*.

12. Click the **Exit** icon.

Batch Post a Requirement Code

Purpose

The purpose of the batch posting process is to help you enter a requirement code for a group of students. To batch post a requirement code, five forms are required.

1. Population Selection Definition Rules (GLRSLCT).
2. Population Selection Extract Data (GLAEXTR).
3. Batch Posting Rules (RORPOST).
4. Batch Posting Process (RORBPST).
5. Applicant Requirements (RRAAREQ).

Note: Section B of this workbook includes directions for creating a Manual population selection on GLRSLCT and a batch posting entry on RORPOST.

Example

You have received several Professional Judgment forms and have decided to use batch posting to enter them in Banner as satisfied tracking documents.

Procedure 1

Follow these steps to complete the procedure.

1. Access the Population Selection Extract Data form (GLAEXTR).
2. Enter *FINAID* in the **Application** field.
3. Enter MANUAL_XX (the name of your manual population selection) in the **Selection ID** field.

Note: The Application and Selection ID fields will be populated automatically if you access this form immediately after setting up a selection on GLRSLCT. If not populated, enter the identifiers for your manual selection.

4. Enter the ID number of your practice student.
5. Click the **Save** icon.
6. Click the **Exit** icon.

Result: You have just created a manual population selection.

Procedure 2

Ask your instructor to determine when everyone has reached this point in the procedure. Your instructor should coordinate this. Only one person in the class needs to run the Batch Posting Process (RORBPST). Follow these steps to complete the procedure.

Note: The RORPOST form **Use Indicator** field must be checked for each item that is to be posted during this process. Your instructor can give you directions for setting the **Use Indicator** field automatically to post by category.

Process Submissions Controls Form (RORBPST)

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 "RORBPST" and a text field containing "Batch Posting Process".
- Parameter Set:** A dropdown menu.
- Printer Control:** A section containing:
 - Printer:** A dropdown menu.
 - Special Print:** A text field.
 - Lines:** A text field with the value "55".
 - Submit Time:** A text field.
- Parameter Values:** A table with two columns: "Number" and "Values".

Number	Parameters	Values
01	Aid Year Code	
02	Print Report (Y/N)	Y

LENGTH: 4 TYPE: Character O/R: Required M/S: Single
Valid, Active Aid Year Code
- Submission:** A section containing:
 - Save Parameter Set as
 - Name:** A text field.
 - Description:** A text field.
 - Hold
 - Submit

Steps 2

Follow these steps to complete the process.

1. Access the Process Submissions Controls Form (RORBPST).
2. Enter *DATABASE* in the **Printer** field.

Result: Entering *DATABASE* allows you to view the results of this process on the Saved Output Review Form (GJIREVO).

3. Use this table to enter the values for the parameters of the job:

Req?	Parameter	Description
✓	Aid Year Code	Enter the aid year code that you are currently working with.
	Print Report (Y/N)	Enter Y for Yes, so that the report will be visible on the Review Output Form (GJIREVO).

4. Select the **Submit** radio button.
5. Click the **Save** icon.

Result: The job will run. A .log file and a .lis file display on the Auto Hint line.

6. Select **Review Output (GJIREVO)** from the **Options** menu.

Note: When the job is completed, the job number from the AutoHint line will display in the box on the left, and a **File Name** box will display. You will receive an error message until the job is completed

7. Double click in the File Name box to display output file choices.
8. Double click the .lis file choice.
9. Use the scroll bars as needed to review the output report.

Note: Groups in the RORBPST output listing are displayed from left to right.

10. Click the **Exit** icon to return to the Job Submission Form (GJAPCTL).
11. Click the **Exit** icon.

Steps 3

Follow these steps to complete the procedure and verify your requirement has been added.

1. Access the Applicant Requirements Form (RRAAREQ).
2. Enter the ID number of the student listed in your population selection.
3. Move to the Requirements block.
4. Take note of the following.
 - The requirement code and status from your RORPOST batch posting entry have been added to the student record.
 - The **System** field displays a code of *B* for the new requirement code.
5. Click the **Exit** icon.

Result: You have just batch posted a tracking requirement.

Self Check

Question 1

Which form is accessed when you select **Assign Tracking Group** from the Options menu of the Applicant Requirements Form (RRAAREQ)?

- a. Applicant Immediate Process Form (ROAIMMP)
- b. Applicant Status Form (ROASTAT)
- c. Award Maintenance Form (RPAAWRD)

Question 2

Three ways to assign a student to a tracking group are the Batch Process (RORGRPS), Online automatic assignment (RRAAREQ and ROAIMMP), and Manually (RRAAREQ).

True or False

Question 3

The Applicant Requirements Mass Entry Form (RRAMASS) can be used to enter multiple requirements for one student.

True or False

Question 4

Write the answer on the line provided. What form would you use to post the same document for multiple students (if you were not using Batch Posting)?

Question 5

What is the job name of the Batch Posting Process?

- a. RORRULE
- b. RORBPST
- c. RORPOST

Answer Key for Self Check

Question 1

Which form is accessed when you select Assign Tracking Group from the Options menu of the Applicant Requirements Form (RRAAREQ)?

- a. **Applicant Immediate Process Form (ROAIMMP)**
- b. Applicant Status Form (ROASTAT)
- c. Award Maintenance Form (RPAAWRD)

Question 2

Three ways to assign a student to a tracking group are the Batch Process (RORGRPS), Online automatic assignment (RRAAREQ and ROAIMMP), and Manually (RRAAREQ).

True

Question 3

The Applicant Requirements Mass Entry Form (RRAMASS) can be used to enter multiple requirements for one student.

True

Question 4

What form would you use to post the same document for multiple students (if you were not using Batch Posting)?

Applicant Requirements Mass Entry Form (RRAMASS)

Question 5

What is the job name of the Batch Posting Process?

- a. RORRULE
- b. RORBPST
- c. RORPOST**

Appendix



Forms Job Aid

Form Code	Full Name	Use this form to...
RTVTREQ	Requirements Tracking Validation	define and maintain standard requirement codes.
RTVTRST	Requirements Tracking Status Validation	define and maintain your own standardized tracking status codes
RTVMESG	Message Code Validation	Permit the maintenance of message-related codes, indicators, and dates.
RORMESG	Message Rules	Associate message codes with a tracking requirement code.
RTVTGRP	Requirements Tracking Group Validation	define and maintain standard tracking group codes.
RORRULE	Financial Aid Selection Rules	perform functions based on the rule type that you enter in the Rule Type field.
RRRGREQ	Requirements Tracking Group/Requirements Rules	identify the set of requirements that you want to assign to students in a particular tracking group for a specified aid year.
ROAINST	Institution Financial Aid Options	include global options for the Banner Financial Aid System.
RRAAREQ	Applicant Requirements	complete the form and manually assign a student to a tracking group.

ROAIMMP	Applicant Immediate Process	perform automatic group assignments, satisfactory academic progress status assignments, packaging fund assignments, need analysis calculations, Pell calculations, and authorize the disbursement of available financial aid.
RORGRPS	Automatic Group Assignment	batch assign tracking groups and requirements to students.
ROIGRPI	Group Inquiry	display tracking group codes and the number of students assigned to each group for a specified aid year.
RRAMASS	Applicant Requirements Mass Entry	enter multiple applicant tracking requirements for a specified aid year.
RRAAREQ ROARMAN	Applicant Requirements Financial Aid Record Maintenance	record incoming documents for a single student.
GLRSLCT	Population Selection Definition Rules	define, maintain, and copy a population selection.
GLAEXTR	Population Selection Extract Data	manually create, change, and display a population.
RORPOST	Batch Posting Rules	allow identification (through Selection IDs) of students who are to receive a change in their data in any of the many different areas.
RORBPST	Batch Posting Process	batch post a requirement code for a group of students.