

# Banner Financial Aid Scholarship and Athletic Aid Training Workbook

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**Revision History Log**

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

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# Introduction



## Course goal

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

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

## Course objectives

In this course you will learn how to

- set up athletic aid in Banner
- set up donor and source details
- set up scholarship and athletic aid rules
- manage athletic aid information
- roll grants in Banner
- view student scholarship information
- maintain donor and scholarship information.

## Intended audience

Financial Aid office administrators and staff.

## Prerequisites

To complete this course, you should have

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

# Process Introduction

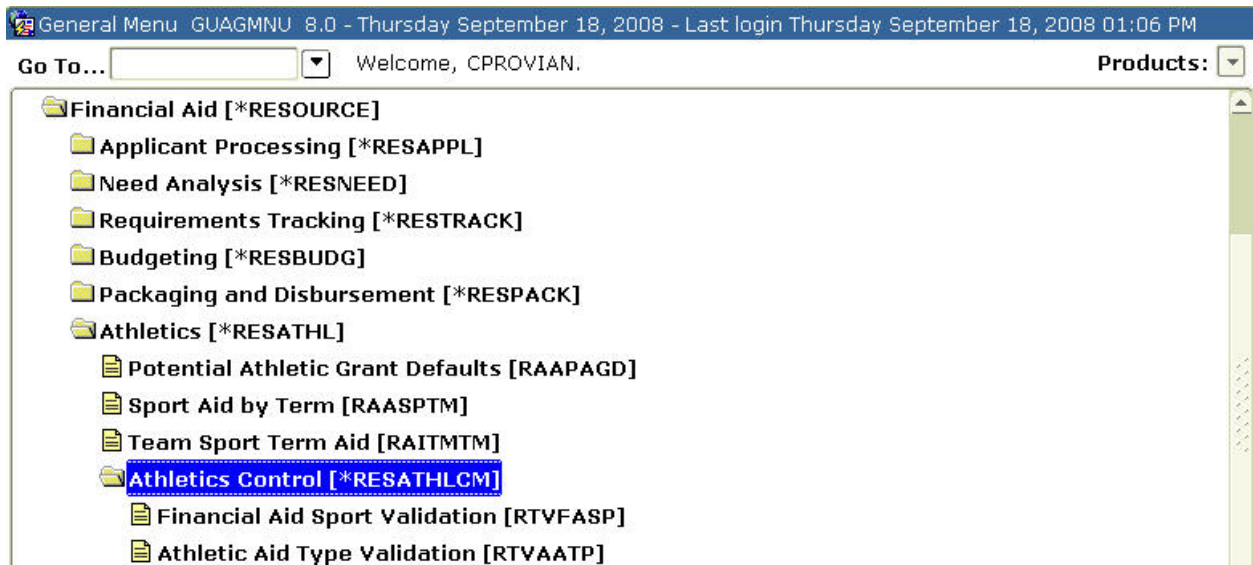
## Introduction

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

### Scholarship and Athletic Aid

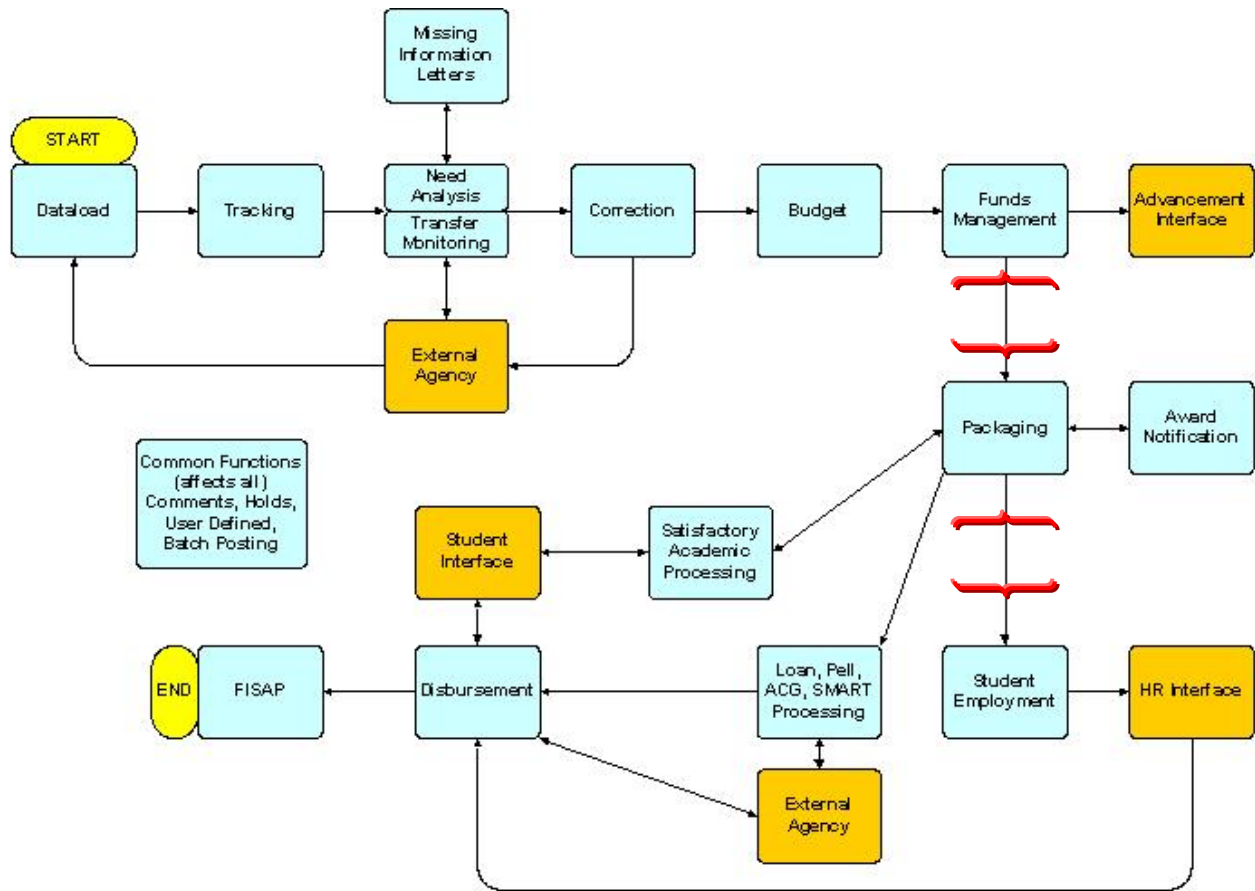
- enables you to track scholarships and athletic information by term
- allows you to count scholarship by term and define how many terms a student can receive a scholarship
- allows you to view the maximum terms, amount paid, loss of eligibility, and remaining terms of eligibility
- provides the option to auto-populate or manually enter specific student athletic data by term
- enables you to track donor and scholarship information.

## Menu



## Flow diagram

This diagram highlights the overall financial aid processes. Scholarships or athletic aid can be awarded either before or after Packaging.



# Set Up



## Section goal

The goal of this section is to outline the set-up process and detail the procedures to set up your Banner system for scholarships and athletic aid.

## Objectives

In this section you will learn how to

- identify all of the set-up forms required for Scholarships and Athletic Aid
- assign code names to be utilized by other Banner forms
- create basic rules that support Scholarships and Athletic Aid
- define scholarship and aid categories
- assign scholarship sources.

# Athletic Aid Validation Form

## Purpose

The Athletic Aid Validation Form (RTVAATP) enables you to set up athletic aid types to be used on the Financial Aid Sport Aid by Term Form (RAASPTM). For example, Medical Release, Injured Reserve, and Redshirt.

## Banner form

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"/>	

## Field options

See descriptions of the fields below.

Field	Description
Code	Code to be used for Athletic Aid Type.
Description	Athletic Aid Type Code Description.
Active	Athletic Aid Type Code Active Indicator. Uncheck to inactivate.

## Steps

Follow these steps to create an athletic aid type.

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

# Financial Aid Sport Validation Form

## Purpose

The Financial Aid Sport Validation Form (RTVFASP) enables you to designate Financial Aid sport codes to be used on RAASPTM, as they may differ from what is used in Banner Student.

## Banner form

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"/>	

## Field options

See descriptions of the fields below.

Field	Description
Code	Code to be used for Financial Aid Sport.
Description	Financial Aid Sport Code Description.
Active	Financial Aid Sport Code Active Indicator. Uncheck to Inactivate.

## Steps

Follow these steps to designate a Sport Code.

1. Access the Financial Aid Sport Validation Form (RTVFASP).
2. Enter a code for the rule in the **Code** field.
3. Enter a description for the rule in the **Description** field.
4. Ensure the **Active** indicator is checked.
5. Click the **Save** icon.
6. Click the **Exit** icon.

# Potential Athletic Grant Defaults Form

## Purpose

The Potential Athletic Grant Defaults Form (RAAPAGD) allows you to enter default award year values for potential athletic grant amounts. The form is split up into two blocks. The first block allows you to enter potential athletic grant default amounts for in-state and out-of-state athletes. The second block allows you to enter sport-specific default amounts for in-state and out-of-state athletes. If a sport is defined in the second block, then the appropriate default amount is used for the student on the Sport Aid by Term Form (RAASPTM). Otherwise, the appropriate default amount from the first block gets populated.

## Banner form

The screenshot shows a web browser window titled "Potential Athletic Grant Defaults: RAAPAGD 8.2 (C800)". The interface includes the following elements:

- Aid Year:** A dropdown menu set to "0809" and a radio button for "Aid Year 2008 - 2009".
- Potential Athletic Grant Default:** A section with three input fields: "In-State Amount", "Out-of-State Amount", and "Activity Date".
- Sport Code Table:** A table with five columns: "Sport Code", "Description", "In-State Amount", "Out-of-State Amount", and "Activity Date". The "Sport Code" column has a dropdown menu. There are 12 rows of input fields.
- Copy To:** A section with an "Aid Year" dropdown menu and a "Copy" button with a document icon.

## Steps

Follow these steps to enter default award year values for athletic grants.

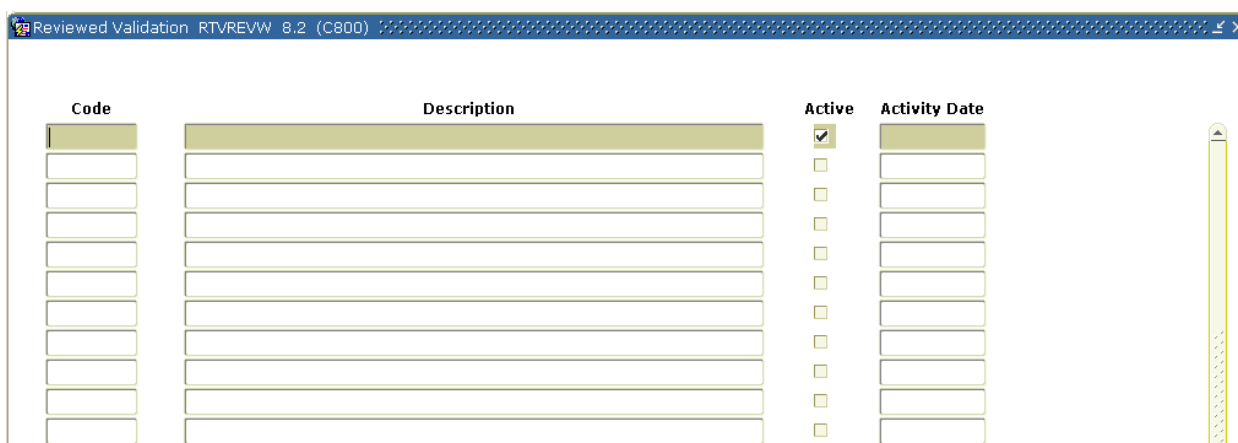
1. Access the Potential Athletic Grant Defaults Form (RAAPAGD).
2. Confirm or change the aid year code in the **Aid Year** field.
3. Perform a **Next Block** function.
4. Complete the **In-State Amount** field for the Potential Athletic Grant Default.
5. Complete the **Out-of-State Amount** field for the Potential Athletic Grant Default.
6. Perform a **Next Block** function.
7. Select the sport code in the **Sport Code** field.
8. Enter a description for the rule in the **Description** field.
9. Complete the **In-State Amount** field.
10. Complete the **Out-of-State Amount** field.
11. Perform a **Next Block** function.
12. Complete the **Aid Year** field to copy the rules created to another aid year.
13. Click the **Save** icon.
14. Click the **Exit** icon.

# Review Validation Form

## Purpose

The Reviewed Validation Form (RTVREVV) is used to designate the review status of an athlete's institutional award, outside award, resource, and/or contract or exemption. For example, you might use this form to designate that the information for the fund, resource, and contract/exemption has been reviewed and is complete.

## Banner form



## Field options

See descriptions of the fields below.

Field	Description
Code	Code to be used for Reviewed Status.
Description	Reviewed Code Description.
Active	Reviewed Code Active Indicator. Uncheck to Inactivate.

## Steps

Follow these steps to designate the review status of an award.

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

# Scholarship Source Validation Form

## Purpose

The Scholarship Source Validation Form (RTVSSRC) enables you to designate the source of a scholarship. For example, a donor, a gift, or an institution.

## Banner form

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"/>	

## Field options

See descriptions of the fields below.

Field	Description
Code	Code to be used for Scholarship Source.
Description	Scholarship Source Code Description.
Active	Scholarship Source Code Active Indicator. Uncheck to Inactivate.

## Steps

Follow these steps to designate the source of a scholarship.

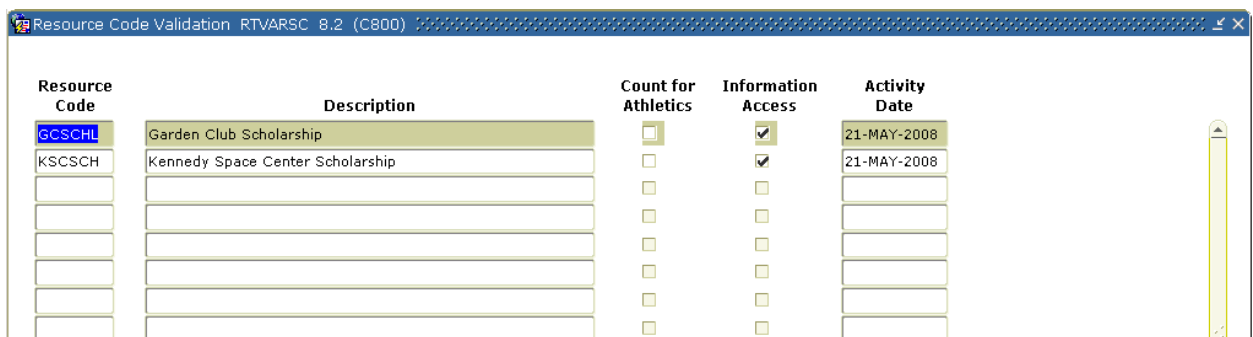
1. Access the Scholarship Source Validation Form (RTVFCAT).
2. Enter a code for the rule in the **Code** field.
3. Enter a description for the rule in the **Description** field.
4. Ensure the **Active** indicator is checked.
5. Click the **Save** icon.
6. Click the **Exit** icon.

# Recourse Code Validation Form

## Purpose

On the Resource Code Validation Form (RTVARSC), you have the ability to define resource codes for "other resources" (that is, resources other than contract and exemption resources which are defined in the Banner Student). These resource codes are used by the Resource Form (RPAARSC).

## Banner form



Resource Code	Description	Count for Athletics	Information Access	Activity Date
GCSCHL	Garden Club Scholarship	<input type="checkbox"/>	<input checked="" type="checkbox"/>	21-MAY-2008
KSCSCH	Kennedy Space Center Scholarship	<input type="checkbox"/>	<input checked="" type="checkbox"/>	21-MAY-2008
		<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 define a resource code.

1. Access the Resource Code Validation Form (RTVARSC).
2. Enter a resource code for the rule in the **Resource Code** field.
3. Enter a description for the rule in the **Description** field.
4. Select the **Count for Athletics** check box, if desired.
5. Select the **Information Access** check box, if desired.
6. Click the **Save** icon.
7. Click the **Exit** icon.

# Grades to Donor Validation Form

## Purpose

The Grades to Donor Validation Form (RTVGRDD) allows you to designate specific categories of grades that a donor wishes to receive, if any. For example, a donor may wish to receive grades only for the freshmen students or only for students in a specific program.

## Banner form

The screenshot shows a window titled "Grades to Donor Validation RTVGRDD 8.2 (C800)". Inside the window is a table with the following structure:

Code	Description	Active	Activity Date
<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<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="text"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<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="text"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<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="text"/>

## Field options

See descriptions of the fields below.

Field	Description
Code	Code to be used to define group(s) for which donor wishes to receive grades.
Description	Grades to Donor Code Description.
Active	Grades to Donor Code Active Indicator. Uncheck to Inactivate.

## Steps

Follow these steps to designate grade categories.

1. Access the Grades to Donor Validation Form (RTVGRDD).
2. Enter a code for the rule in the **Code** field.
3. Enter a description for the rule in the **Description** field.
4. Ensure the **Active** indicator is checked.
5. Click the **Save** icon.
6. Click the **Exit** icon.



## Steps

Follow these steps to designate thank you letter categories.

1. Access the Thank You Letter Validation Form (RTVTYLT).
2. Enter a code for the rule in the **Code** field.
3. Enter a description for the rule in the **Description** field.
4. Ensure the **Active** indicator is checked.
5. Click the **Save** icon.
6. Click the **Exit** icon.



## Steps

Follow these steps to define third-party contracts for a term code.

1. Access the Contract Rules Form (RPRCONT).
2. Select the Contract ID in the **Contract ID** field.
3. Select the Contract Number in the **Contract Number** field.
4. Enter the estimated amount in the **Estimated Amount** field.
5. Check the appropriate parameters for the Contract: **Exclude as Resource, Count for Athletics, Roll Contract, and Info Access.**
6. Click the **Save** icon.
7. Click the **Exit** icon.



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 purpose for using the Resource Code Validation Form (RTVARSC) is to

- a. define contract resource does.
- b. define resource codes for resources other than contract and exemption resources.
- c. link scholarships to resources.
- d. accept or decline aid on behalf of the student.
- e. modify donor information.

### Question 2

Which form allows you to designate the source of a scholarship?

- a. Review Validation Form.
- b. Potential Athletic Grant Defaults Form.
- c. Financial Aid Sport Validation Form.
- d. Athletic Aid Validation Form.
- e. Scholarship Source Validation Form.

### Question 3

Which form must be completed before utilizing the Financial Aid Sport Aid by Term Form (RAASPTM)?

- a. Review Validation Form.
- b. Potential Athletic Grant Defaults Form.
- c. Financial Aid Sport Validation Form.
- d. Athletic Aid Validation Form.
- e. Scholarship Source Validation Form.

### Question 4

The Scholarship Source Validation Form may be used to designate that the information for the fund, resource, and contract/exemption has been reviewed and is complete.

True or False.

### Question 5

Banner Financial Aid allows you to create a rule that sends grades for the freshmen students to a donor.

True or False.

# Answer Key for Self Check

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## Question 1

The purpose for using the Resource Code Validation Form (RTVARSC) is to

- b. define resource codes for resources other than contract and exemption resources.**

## Question 2

Which form allows you to designate the source of a scholarship?

- e. Scholarship Source Validation Form.**

## Question 3

Which form must be completed before utilizing the Financial Aid Sport Aid by Term Form (RAASPTM)?

- d. Athletic Aid Validation Form.**

## Question 4

The Scholarship Source Validation Form may be used to designate that the information for the fund, resource, and contract/exemption has been reviewed and is complete.

**False.**

## Question 5

Banner Financial Aid allows you to create a rule that sends grades for the freshmen students to a donor.

**True.**

# Day-to-Day Operations



## Section goal

The goal of this section is to provide you with the knowledge and practice to handle Scholarships and Athletic Aid at your institution.

## Objectives

In this section you will learn how to

- enter and maintain scholarship and athletic aid information
- assign a scholarship or athletic aid to a student
- roll athletic grant information from one term to the next
- award, accept, and decline/cancel funds manually and through mass entry
- define demographic information for donors and scholarships.

# Managing Athletic Aid Information

## Purpose

You will use the Financial Aid Sport Aid by Term Form (RAASPTM) to display and enter student athletic aid information for a specific term.

## Banner form

Form fields and sections include:

- ID:
- Aid for Sport: **Student Sport**
- Term:
- Sport:
- Type:   Default Aid Values
- Number of Terms/Summer Terms:
- Potential Athletic Grant - Year:
- Athlete's Actual Grant - Term:
- Last Activity Date:
- Percent:
- Credit Hours:
- Resident:

Fund	Description	Actual	Reviewed	Reported
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Limits	Individual	Team	COA
	<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"/>
Total:	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Steps

Follow these steps to display or enter student athletic aid information for a specific term.

1. Access the Award Form (RAASPTM).
2. Select the student ID in the **ID** field.
3. Perform a **Next Block** function.
4. Select the term in the **Term** field.
5. Select the sport code in the **Sport** field.
6. Select the athletic aid type in the **Type** field.

Note: If the type does not display, hit Tab on your keyboard.

7. Enter the number of terms and number of summer terms that the scholarship is allowed in the **Number of Terms/Summer Terms** field.
8. Enter a dollar amount that the student should receive for the entire year in the **Potential Athletic Grant – Year** field.
9. Click on the **Default Aid Values** button to bring back information regarding awards.
10. Perform a **Next Block** function.
11. Select the fund in the **Fund** field.
12. Click the **Save** icon.
13. Click the **Exit** icon.



## Purpose

You will use the Resource Maintenance Form (RPAARSC) to enter other resources for an applicant (that is, resources other than contract and exemption resources which are defined in Banner Student) for each aid year and term. The second window of this form allows you to view contract and exemption resource information directly from Banner Student if the **Interface Exemptions** or the **Interface Third Party Contracts** field on the Packaging Options Form (RPROPTS) is checked.

You can use resources in the Banner Financial Aid to reduce an applicant's gross need. Banner calculates other resources to reduce gross need by first checking for an actual amount to use. If an actual amount is not available, Banner uses the estimated amount.

## Banner form

The screenshot shows the 'Resource Maintenance RPAARSC 8.2 (C800)' window. At the top, there are dropdown menus for 'Aid Year' (set to 0809) and 'ID'. Below this is a section titled 'Other Resources' with a table structure. Each row in the table has columns for 'Resource', 'Term', 'Type', 'Number', 'Info Access', 'Estimated', and 'Actual'. There are five rows of input fields. At the bottom of the 'Other Resources' section is a field for 'Other Resources Calculated Total'. Below the 'Other Resources' section is a 'Summary' section with fields for 'Budget', 'Gross Need', 'EFC', 'Offered', 'Resources', and 'Unmet Need'. There is also a checkbox labeled 'EFC'.

## Steps

Follow these steps to enter other resources for an applicant.

1. Access the Resource Maintenance Form (RPAARSC).
2. Confirm or select the appropriate aid year in the **Aid Year** field.
3. Select the student ID in the **ID** field.
4. Perform a **Next Block** function.
5. Select the resource in the **Resource** field.
6. Select the term in the **Term** field.
7. Enter the estimated aid amount in the **Estimated** field.
8. Enter the actual aid amount in the **Actual** field.
9. Click the **Save** icon.
10. Click the **Exit** icon.

# Rolling Grants in Banner

## Purpose

You will use the Athletic Grant Term Roll Process Form (RAPAGRL) to roll athletic grant term information on the Sport Aid by Term form (RAASPTM) from one term to the next. When the Term parameter (Parameter 04) is R, then the Number of Terms field on RAASPTM is incremented by 1. When it is equal to S, then the Summer Terms field is incremented by 1.

Note: When this process is run in Audit mode, the output will indicate the potential number of rollable records and non-rollable records. When run in Update mode, the actual number of rolled or non-rolled records will be indicated.

## Banner form

The screenshot shows a web-based form titled "Process Submission Controls GJAPCTL 8.0 (C800)". The form is divided into several sections:

- Process:** A dropdown menu with "RAPAGRL" selected, followed by a text field containing "Athletic Grant Term Roll Proc".
- Parameter Set:** A dropdown menu.
- Printer Control:** A section with a "Printer:" dropdown, a "Special Print:" text field, "Lines:" with an input field, and "Submit Time:" with an input field.
- Parameter Values:** A table with three columns: "Number", "Parameters", and "Values". Each column has a dropdown menu. The "Number" column has eight checkboxes. The "Parameters" and "Values" columns have eight text input fields each. A vertical scrollbar is on the right side of the table.
- Submission:** A section with a "Save Parameter Set as" checkbox, "Name:" and "Description:" text fields, and radio buttons for "Hold" and "Submit".

## Steps

Follow these steps to roll athletic grant term information from one term to the next.

1. Access the Athletic Grant Term Roll Process Form (RAPAGRL).
2. If you want the output to appear on the screen, enter *Database* in the **Printer** field. If you want the output printed out, select the printer.
3. Perform a **Next Block** function to access the Parameter Values block.
4. Add the values as follows:

<b>Number</b>	<b>Parameters</b>	<b>Action</b>
01	From Term	Enter term code from which athletic grant information is to be rolled
02	To Term	Enter term code to which athletic grant information is to be rolled
03	Sport Code	Enter financial aid Sport Code
04	Term	Enter term type to be created
05	Athlete's Actual Grant	Enter athlete's actual grant – term amount
06	Run Mode	Enter (A)udit or (U)pdate mode
07	Sort Option	Enter (N)ame or (I)D
08	Application ID	Enter general area for which the selection ID was defined
09	Selection ID	Enter a code that identifies the sub-population to work with
10	Creator ID	Enter ID of the person creating the sub-population rules
11	User ID	Enter ID of the person using the sub-population rules

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

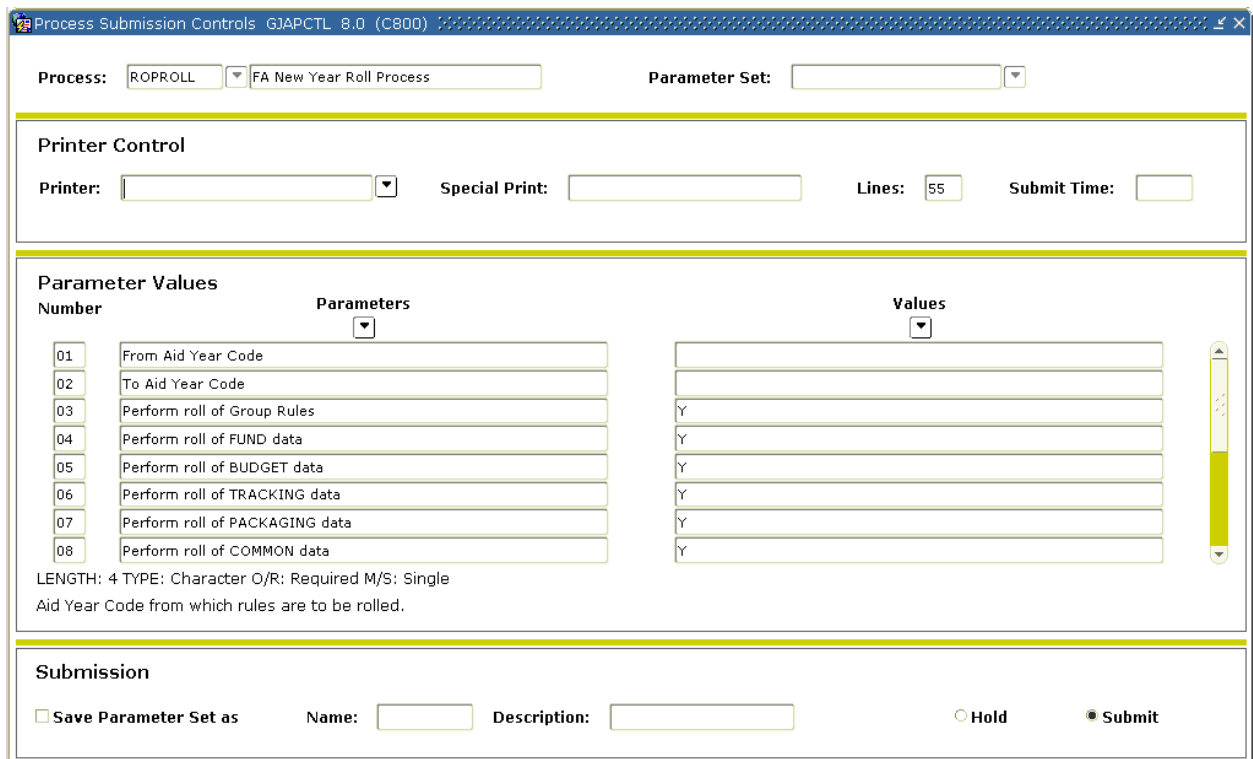
## Purpose

You will use the FA New Year Roll Process Form (ROPROLL) to submit a Banner job or report for processing. You can specify the print settings and parameter values that control processing. You can run the job or report immediately or hold it for later processing from the operating system.

Default parameter values appear if they have been defined. They can be user-level defaults, system-level defaults, or a combination of both. Using defaults reduces the number of entries you must make each time you run the job or report.

Warning: The Process Run Parameter Table (GJBPRUN) stores parameter values until a job or report runs successfully. Closely monitor the space allocation and contents of this table. Use SQL\*Plus to remove parameter values for jobs and reports that fail or never run.

## Banner form



Process Submission Controls GJAPCTL 8.0 (C800)

Process:  FA New Year Roll Process      Parameter Set:

---

**Printer Control**

Printer:       Special Print:       Lines:       Submit Time:

---

**Parameter Values**

Number	Parameters	Values
<input type="text" value="01"/>	<input type="text" value="From Aid Year Code"/>	<input type="text"/>
<input type="text" value="02"/>	<input type="text" value="To Aid Year Code"/>	<input type="text"/>
<input type="text" value="03"/>	<input type="text" value="Perform roll of Group Rules"/>	<input type="text" value="Y"/>
<input type="text" value="04"/>	<input type="text" value="Perform roll of FUND data"/>	<input type="text" value="Y"/>
<input type="text" value="05"/>	<input type="text" value="Perform roll of BUDGET data"/>	<input type="text" value="Y"/>
<input type="text" value="06"/>	<input type="text" value="Perform roll of TRACKING data"/>	<input type="text" value="Y"/>
<input type="text" value="07"/>	<input type="text" value="Perform roll of PACKAGING data"/>	<input type="text" value="Y"/>
<input type="text" value="08"/>	<input type="text" value="Perform roll of COMMON data"/>	<input type="text" value="Y"/>

LENGTH: 4 TYPE: Character O/R: Required M/S: Single  
Aid Year Code from which rules are to be rolled.

---

**Submission**

Save Parameter Set as      Name:       Description:        Hold       Submit

## Steps

Follow these steps to submit a Banner job or report for processing.

1. Access the FA New Year Roll Process Form (ROPROLL).
2. If you want the output to appear on the screen, enter *Database* in the **Printer** field. If you want the output printed out, select the printer.
3. Perform a **Next Block** function to access the Parameter Values block.
4. Add the values as follows:

<b>Number</b>	<b>Parameters</b>	<b>Action</b>
01	From Aid Year Code	Enter aid year code from which athletic grant information is to be rolled
02	To Aid Year Code	Enter aid year code to which athletic grant information is to be rolled
03	Perform roll of Group Rules	Enter (Y)es or (N)o
04	Perform roll of FUND Data	Enter (Y)es or (N)o
05	Perform roll of BUDGET Data	Enter (Y)es or (N)o
06	Perform roll of TRACKING Data	Enter (Y)es or (N)o
07	Perform roll of PACKAGING Data	Enter (Y)es or (N)o
08	Perform roll of COMMON Data	Enter (Y)es or (N)o
09	Perform roll of EMPLOYMNT Data	Enter (Y)es or (N)o
10	Perform roll of ATHLETIC Data	Enter (Y)es or (N)o

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



4. Perform two **Next Block** functions to access the Scholarship Details block.
5. Click the **Save** icon.
6. Click the **Exit** icon.

## Purpose

You will use the Athletic Aid Discrepancy Report Form (RARATAD) to display the discrepant information between the actual fund/resource amounts and the reported amounts on the Sport Aid by Term Form (RAASPTM). This report should be used to determine if a student's award information has been updated since this information was originally reported to Athletics.

For example, the Default Aid Values button was clicked on September 2, and the student reported amount that was sent to Athletics was \$5,000 for the term. An update was made to the student's award on September 9, and the award for the term is now \$4,000. RAASPTM will show \$4,000 for the Actual amount and \$5,000 for the Reported amount. The RARATAD report will display these values, which alerts you to manually update the Reported amount on RAASPTM and to notify Athletics of the change.

## Banner form

The screenshot shows a web browser window titled "Process Submission Controls GJAPCTL 8.0 (C800)". The interface is divided into several sections:

- Process:** A dropdown menu showing "RARATAD" and a text input field containing "Athletic Aid Discrepancy Rpt".
- Parameter Set:** A dropdown menu.
- Printer Control:** Includes a "Printer:" dropdown, "Special Print:" text input, "Lines:" checkbox, and "Submit Time:" text input.
- Parameter Values:** A table with three columns: "Number", "Parameters", and "Values". Each column has a dropdown menu. The "Number" column contains eight checkboxes. The "Parameters" and "Values" columns contain eight text input fields each. A vertical scrollbar is on the right side of this section.
- Submission:** Includes a checkbox for "Save Parameter Set as", "Name:" and "Description:" text input fields, and radio buttons for "Hold" and "Submit".

## Steps

Follow these steps to display the discrepant information between the actual fund/resource amounts and the reported amounts.

1. Access the Athletic Aid Discrepancy Report Form (RARATAD).
2. If you want the output to appear on the screen, enter *Database* in the **Printer** field. If you want the output printed out, select the printer.
3. Perform a **Next Block** function until you access the Parameter Values block.
4. Add the values as follows:

Number	Parameters	Action
01	Term	Enter term code from which athletic grant discrepancy information is to be reported
02	Sport Code	Enter financial aid Sport Code
03	Sort Option	Enter (N)ame or (I)D
04	Application ID	Enter general area for which the selection ID was defined
05	Selection ID	Enter a code that identifies the sub-population to work with
06	Creator ID	Enter the ID of the person creating the sub-population rules
07	User ID	Enter the ID of the person using the sub-population rules

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

# Maintaining Donor and Scholarship Information

## Purpose

You will use the Donor Scholarship Demographics Form (RFADSCD) to capture donor and scholarship information.

## Banner form

The screenshot shows a web browser window titled "Donor and Scholarship Demographics RFADSCD 8.2 (C800)". The form is divided into several sections:

- Fund Code:** A dropdown menu.
- Scholarship Demographics:** Contains checkboxes for "Multiple Donors", "Restricted", and "Tuition Waiver". It also includes fields for "Maximum Number of Terms" (text input), "Scholarship Source" (dropdown menu), and "Minimum Enrollment" (dropdown menu with "(None)" selected).
- Donor Demographics:** This section is repeated twice. Each instance includes a "Donor ID" dropdown menu, a list of checkboxes for "Anonymous", "Primary", "Deceased", "Reception Invite", and "Donor Selects Recipient", and fields for "Grades" and "Letter" (both dropdown menus). To the right of each donor section is a button labeled "Address, Telephone, E-mail details".

## Steps

Follow these steps to identify donor demographic information.

1. Access the Donor Scholarship Demographics Form (RFADSCD).
2. Select the fund code in the **Fund Code** field.
3. Perform a **Next Block** function.
4. Select the appropriate Scholarship Demographics information: **Multiple Donors, Restricted, and Tuition Waiver**.

5. Enter the maximum number of terms in the **Maximum Number of Terms** field.
6. Select the scholarship source in the **Scholarship Source** field.
7. Select the minimum enrollment from the **Minimum Enrollment** drop down, if applicable.
8. Perform a **Next Block** function.
9. Select the donor ID from the **Donor ID** field.
10. Select the appropriate Donor Demographics information: **Anonymous, Primary, Deceased, Reception Invite, Donor Selects Recipient, Grades,** and **Letter**.
11. Select the **Address, Telephone, E-mail details** icon to view donor details on the General Person Identification Form (SPAIDEN).
12. Click the **Exit** icon to return to RFADSCD.
13. Click the **Save** icon.
14. Click the **Exit** icon.

# Self Check

---

## Directions

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

## Question 1

Which form allows you to add additional resources for an applicant?

- a. Resource Maintenance Form.
- b. Team Sport Term Aid Form.
- c. Financial Aid Sport Aid by Term Form.
- d. Athletic Grant Term Roll Process Form.
- e. FA New Year Roll Process Form.

## Question 2

Within the FA New Year Roll Process Form, parameter values are either user-level defaults or system-level defaults, and cannot be a combination of each.

True or False.

## Question 3

The Athletic Aid Discrepancy Report Form (RARATAD) displays the discrepancy between the actual fund/resource amounts and the reported amounts on Sport Aid by Term Form (RAASPTM).

True or False.

## Question 4

Which form allows you to roll athletic grant information from one term to the next?

- a. Resource Maintenance Form.
- b. Team Sport Term Aid Form.
- c. Financial Aid Sport Aid by Term Form.
- d. Athletic Grant Term Roll Process Form.
- e. FA New Year Roll Process Form.

# Answer Key for Self Check

---

## Question 1

Which form allows you to add additional resources for an applicant?

- a. **Resource Maintenance Form.**

## Question 2

Within the FA New Year Roll Process Form, parameter values are either user-level defaults or system-level defaults, and cannot be a combination of each.

**False.**

## Question 3

The Athletic Aid Discrepancy Report Form (RARATAD) displays the discrepancy between the actual fund/resource amounts and the reported amounts on Sport Aid by Term Form (RAASPTM).

**True.**

## Question 4

Which form allows you to roll athletic grant information from one term to the next?

- d. **Athletic Grant Term Roll Process Form.**

# Appendix



## Forms Job Aid

Form	Full Name	Use this Form to...
RAAPAGD	Potential Athletic Grant Defaults Form	enter default award year values for athletic grant amounts.
RAASPTM	Financial Aid Sport Aid by Term Form	display and enter student athletic aid information for a specific term.
RAITMTM	Team Sport Term Aid Form	display and total, within sport and term, the Potential Athletic Grant - Year amount, Athlete's Actual Grant - Term amount and percentage of the potential and actual amount based on data from the Sport Aid by Term Form (RAASPTM).
RARATAD	Athletic Aid Discrepancy Report Form	display the discrepant information between the actual fund/resource amounts and the reported amounts on RAASPTM.
RAPAGRL	Athletic Grant Term Roll Process Form	roll athletic grant term information on RAASPTM from one term to the next.
RFADSCD	Donor Scholarship Demographics Form	capture donor and scholarship information.
ROPROLL	FA New Year Roll Process Form	submit a Banner job or report for processing.
RPAARSC	Resource Maintenance Form	enter other resources for an applicant (that is, resources other than contract and exemption resources which are defined in Banner Student) for each aid year and term.
RPASTRM	Scholarship Term Information Form	view scholarship information for a student.

<b>Form</b>	<b>Full Name</b>	<b>Use this Form to...</b>
RPRCONT	Contract Rules Form	define third-party contracts for a specified term code and estimates the amount of the third-party contract that may affect a student's need.
RPREXPT	Exemption Rules Form	list the exemption codes for a term and estimate the amount of an exemption that may affect a student's financial support.
RTVAATP	Athletic Aid Type Validation Form	set up Athletic Aid Types to be used on the Financial Aid Sport Aid by Term Form (RAASPTM)
RTVARSC	Resource Code Validation Form	define resource codes for "other resources" (that is, resources other than contract and exemption resources which are defined in the Banner Student).
RTVFASP	Financial Aid Sport Validation Form	designate Financial Aid sport codes to be used on RAASPTM, as they may differ from what is used in Banner Student.
RTVGRDD	Grades to Donor Validation Form	designate specific categories of grades that a donor wishes to receive, if any.
RTVREVV	Reviewed Validation Form	designate the review status of an athlete's institutional award, outside award, resource, and/or contract or exemption.
RTVSSRC	Scholarship Source Validation Form	designate the source of a scholarship.
RTVTYLT	Thank You Letter Validation Form	designate specific categories of a thank you letter that a donor wishes to receive, if any.
SPAIDEN	General Person Identification Form	capture biographic/demographic information for all persons/non-persons associated with the institution.