

Banner Financial Aid Financial Aid Self-Service Training Workbook

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Revision History Log

Publication Date	Summary
11/20/2008	New version that supports Banner 8.0 software.
1/9/2009	Minor bugfix version.
2/9/2009	Revision to the Third Party Audit Access Form lesson to Banner 8 functionality (from Banner 7).

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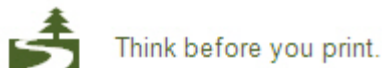


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Introduction



Course goal

The goal of this workbook is to provide you with information needed to utilize the Banner Financial Aid Self-Service Module. The workbook is divided into four sections:

- Introduction
- Basic tasks
- Advanced tasks
- Reference

Intended audience

Financial Aid office administrators.

Basic Tasks



Introduction

Banner Financial Aid Self-Service provides and collects certain financial aid information via the web. Banner Financial Aid Self-Service Basic functionally exists to allow the Financial Aid office to control what the student can see on Banner Financial Aid Self-Service.

The topics contained in this section include display of the following areas:

- Applicant Tracking Requirements
- Applicant Budget
- Financial Aid Holds
- Award Display
- Contracts and Exemption Display
- Outside Resource Display
- Messages
- Loan and Lender Information Display
- Satisfactory Academic Progress.

Objectives

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

- set up Banner Financial Aid Self-Service controls
- set up the display of tracking requirements, promissory notes, COAs, financial aid holds, funds, contracts, exemptions, outside resources, and messages
- enable students to see their awards
- set other lenders' URLs
- manage student pin numbers.

Intended audience

Financial Aid office administrators.

Prerequisites










To complete this section, you should have a basic understanding of the following Banner FA Modules: Requirements Tracking, Applicant Budgeting, Common Functions, Packaging, and Loans. Setup in these modules will affect what displays online.

Banner Financial Aid Self-Service Main Menu

Purpose

The Applicant Forms display first on the Banner Financial Aid Self-Service Menu. These forms have Information Access flags to allow or not allow specific awards, requirements, resources, and other information to display to a particular student. These flags can be updated manually for a student and in many cases with batch posting for a population of students.

Banner menu

-  **Financial Aid Self-Service [*RESWEB]**
-  **Web Applicant Reported Information [RPAINFO]**
-  **Award Maintenance [RPAAWRD]**
-  **Package Maintenance [RPAAPMT]**
-  **Financial Aid Record Maintenance [ROARMAN]**
-  **Applicant Requirements [RRAAREQ]**
-  **Resource Maintenance [RPAARSC]**
-  **Student Lender History Data [RPASLND]**
-  **Financial Aid Self-Service Control [*RESWEBBCM]**

Banner Financial Aid Self-Service Controls

Purpose

The Control Forms display on the control submenu of the Banner Financial Aid Self-Service Menu. These forms contain controls, validation tables, and rules that work more globally.

Banner menu

- Financial Aid Self-Service Control [*RESWEBCM]
 - Institution Financial Aid Options [ROAINST]
 - Fund Management [RFRMGMT]
 - Funds Management [ROAMGMT]
 - Fund Base Data [RFRBASE]
 - Third Party Contract Rules [RPRCONT]
 - Exemption Rules [RPREXPT]
 - Message Rules [RORMESG]
 - Lender Base Data [RPRLNDR]
 - Web Question and Answer Rules [RORWBQA]
 - Web Tab Rules [RORWTAB]
 - Web Text Rules [RORWTXT]
 - Web Variables [RORWVAR]
 - Resource Code Validation [RTVARSC]
 - Award Status Validation [RTVAWST]
 - E-Mail Letter Module Validation [RTVELTM]
 - Hold Type Validation [RTVHOLD]
 - Message Code Validation [RTVMESG]
 - Packaging Group Validation [RTVPGRP]
 - Requirements Tracking Validation [RTVTREQ]
 - Web Question Validation [RTVWEBQ]
 - Web Text Rule Code Validation [RTVWTXT]
 - Web Variable Validation [RTVWVAR]

Purpose

On the Institution Financial Aid Options Form (ROAINST), you can set up basic overall Banner Financial Aid Self-Service Controls.

This form enables you to:

- activate or inactivate Banner Financial Aid Self-Service for the aid year
- indicate if you want to display the COA Detail
- indicate if you want to display the Need Calculation
- indicate if you want to display the Cumulative Loan Amounts
- indicate if you want to display the Outside Resource Detail
- indicate if you want to display the Housing Status
- indicate if you want to display the Terms with Zero Award Amount
- indicate if you want to display the Funds with Zero Award Amount
- enter in a Default Lender URL and Description.

Banner form

The screenshot shows the Banner Financial Aid Options Form (ROAINST) with the following details:

- Window Title:** Institution Financial Aid Options ROAINST 7.12 (TEST)
- Aid Year:** 0809
- Navigation Tabs:** Options, Loan Options, Credit Hours, Exclude Course Levels, Defaults, Campus/EDE Defaults, Web Processing Rules (selected)
- Information Access Indicator:** Information Access Indicator
- Web Processing Rules:**
 - Display COA Detail
 - Display Need Calculation
 - Display Cumulative Loan Amounts
 - Display Outside Resource Detail
 - Display Award Messages with Terms and Conditions
 - Allow Partial Amount Acceptance
 - Allow Accept Full Amount of All Awards Option
 - Allow Student to Submit Outside Resource Information
 - Allow Student to Submit Award Information
 - Display Housing Status
 - Display Terms with Zero Award Amount
 - Display Funds with Zero Award Amount
 - Display Resources/Additional Information Tab
 - Display Terms and Conditions Tab
 - Print Terms and Conditions
 - Display Accept Award Offer Tab
 - Display Special Messages Tab
- Value for Null Info Access Indicator:** Y=Use Y for Null Value
- Display Enrollment Status:** F=Full year Enrollment
- Default Lender URL Description:** [Text Field]
- Default Lender URL:** [Text Field]

Web Accept Tracking Rules Requirement Code	Description	Status	Description	Type Code
[Dropdown]		[Dropdown]		A = Award Acceptance
[Text Field]		[Text Field]		[Text Field]
[Text Field]		[Text Field]		[Text Field]

Steps

Follow the steps to set up Banner Financial Aid Self-Service controls.

1. Access the Institutional Financial Aid Options Form (ROAINST).
2. Enter an aid year in the **Aid Year** field.
3. Perform a **Next Block** function.
4. Click on the **Web Processing Rules** tab.
5. Click the **Information Access Indicator** checkbox to turn on Banner Financial Aid Self-Service for this aid year. This will allow students to choose this aid year from the dropdown Menu.

Note: The aid year description the student will see comes from the **Aid Year Description** field on ROAINST.

6. Click the **Display COA Detail** checkbox to display the breakdown of a student's Cost of Attendance on the **Award Overview** tab.

Example of what student will see:

Cost of Attendance	
Component	Amount
Books and Supplies	\$900.00
Personal Expenses	\$2,900.00
Room and Board	\$3,000.00
Transportation	\$1,100.00
Tuition	\$19,000.00
Total:	\$26,900.00

Note: Regardless of this value, budget total and detail will display on initial Financial Aid Status page unless you disable this with Web Tailor.

7. Click the **Need Calculation** checkbox to display students overall need calculation on the **Award Overview** tab.

Example of what a student will see:

Need Calculation	
Component	Amount
Cost of Attendance	\$26,900.00
Estimated Family Contribution	\$300.00
Initial Need	\$26,600.00
Outside Resource	\$3,900.00
Need	\$22,700.00

8. Click the **Display Cumulative Loan Amounts** checkbox to display the total amount of student loan from NSLDS information (RNASLxx) on the **Award Overview** tab.
9. Click the **Display Outside Resource Detail** checkbox to display information from RPAARSC, including contracts and exemptions if interfacing on the **Resources/Additional Information** tab.
10. Click the **Display Housing Status** checkbox to display the student's housing plan from the FAFSA on the **Award Overview** tab.
11. Click the **Display Terms with Zero Award Amount** checkbox to display the terms with no awards.
12. Click the **Display Funds with Zero Award Amount** checkbox to display funds awarded at \$0.
13. Click the dropdown for **Value for Null Info Access Indicator**. Choose *Y* to treat a Null Value Info Access indicator as a Yes (display). Choose *N* to treat a Null Value Info Access indicator as an N (do not display). This applies to the RORSTAT_INFO_ACCESS_IND.
14. Click the dropdown for **Display Enrollment Status**. Choose *F* to display the annual expected enrollment.

If the **Use Estimated Enrollment** box is checked on the Packaging Options Form (RPROPTS), it will use the annual expected enrollment from RNANAx. For students where this field is null, it will use the Estimated Enrollment Default value from RPROPTS.

If the **Use Estimated Enrollment** box is unchecked on RPROPTS, it will automatically use the Estimated Enrollment value from RPROPTS.

Choose *N* to not display any expected enrollment. Choose *T* to display the term expected enrollment from the term fields on RNANAx. (These fields are maintained by the institution and will display on the **Award Overview** tab).

15. Enter in a default lender URL in the **Default Lender URL** field and URL description in the **Default Lender URL Description** field for your default lender if you wish this to display on Banner Financial Aid Self-Service.

Note: This default lender information will be used for all lenders who do not have specific URL information entered in on the Lender Base Data Form (RPRLNDR).

16. Click the **Save** icon to save any changes.

Requirements Tracking

Purpose

The Requirements Tracking Validation Form (RTVTREQ) allows you to indicate globally which tracking items should display on Banner Financial Aid Self-Service.

Banner form

The screenshot displays the Requirements Tracking Validation Form (RTVTREQ) with two entries. Each entry includes a Requirements Code, Short/Long Description, and a grid of checkboxes for various tracking options. The first entry is for PTAX06 (Par. 1040 for 2006) with an activity date of 21-FEB-2008. The second entry is for PTAX07 (Par. 1040 for 2007) with an activity date of 30-OCT-2007. Both entries have the 'Information Access' checkbox checked.

Requirements Code	Short/Long Description	Packaging	Satisfy All	Disbursement	Perkins MPN	Memo	Letter Exclusion	Once	Access Ind	Update Prior Year	Information Access
PTAX06	Par. 1040 for 2006 Signed copy of Parents' Federal 2006 - 1040 & W2's tax forms	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PTAX07	Par. 1040 for 2007 Signed copy of Parents' Federal 2007 - 1040 & W2's tax forms	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Steps

Follow the steps to enable tracking requirements to be displayed on Banner Financial Aid Self-Service.

1. Access the Requirements Tracking Validation Form (RTVTREQ).
2. Click the **Information Access** checkbox for each requirement to display on Banner Financial Aid Self-Service.
3. Enter a URL in the **URL** field to make this tracking requirement a hyperlink bringing the student to the proper location or document when accessed via Banner Financial Aid Self-Service.

Note: There is no functionality at this point that allows a student to submit an electronic document via Banner Financial Aid Self-Service.

4. Enter instructions in the **Instructions** field to display instructions regarding this tracking document. These instructions will display on Banner Financial Aid Self-Service in a pop up window when the student clicks the instructions link after a specific tracking requirement.
5. Click the **Save** icon.
6. Repeat these steps to enable additional tracking items you wish to display on Banner Financial Aid Self-Service.

Purpose

The Applicant Requirements Form (RRAAREQ) allows you to change a student's specific tracking document to not display on Banner Financial Aid Self-Service.

Banner form

Applicant Requirements RRAAREQ 7.12 (C700)

Aid Year: 0708 ID:

Applicant Requirements Perkins MPN Detail Additional Requirements

Summary

Tracking Group: ADMTCL Admit CL

Request Letter Additional Requirements All Requirements Complete:

Lock Group Holds exist Packaging Requirements Complete: 28-NOV-2007

Disbursement Requirements Complete: 22-MAY-2008

Requirements

Requirement	Status	Status Date	Established Date	Satisfied	SBGI	Perkins MPN	Packaging Memo	Disbursement	Letter Access	Info	Fund	System
4F_CRS Friskies Course	E	13-MAY-2008	07-MAY-2008	N		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4F	M
FAFSA Fed. Aid Appl.	S	28-NOV-2007	28-NOV-2007	Y		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		B
INTERV Loan Entrance Inter	S	07-MAY-2008	28-APR-2008	Y		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	DIRECT	M
MPN Stafford MPN	S	07-MAY-2008	28-APR-2008	Y		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	DIRECT	M
TIV Pay Non-Inst	1	22-MAY-2008	22-MAY-2008	Y		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		M
TIVHD Hold Excess	2	22-MAY-2008	22-MAY-2008	Y		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		M
TIVPY Pay Prior Year	2	22-MAY-2008	22-MAY-2008	Y		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		M

SBGI Description:

Steps

Follow the steps to disable/enable student's specific tracking requirement to be displayed on Banner Financial Aid Self-Service.

1. Access the Applicant Requirements Form (RRAAREQ).
2. Enter an aid year in the **Aid Year** field and a student ID in the **ID** field.
3. Perform a **Next Block** function
4. Uncheck the **Information Access** checkbox for each requirement you do not want to display on Banner Financial Aid Self-Service for this particular student.

Note: The default is 'Y' (checked). However, even if it shows checked on the Applicant Requirements Form (RRAAREQ), the document must still have the information access indicator checked on the Requirements Tracking Validation Form (RTVTREQ) to display on Banner Financial Aid Self-Service.

5. Click the **Save** icon.

Banner form

Applicant Requirements RRAAREQ 7.12 (C700)

Aid Year: 0708 ID:

Create Person

Applicant Requirements Perkins MPN Detail **Additional Requirements**

Promissory Notes

Fund	Term	Direct Loan Sequence	Direct Loan Status	Effective Date	Satisfied	Satisfied Date
DIRECT Federal Direct Stafford Loan	<input type="text"/>	1	S	15-APR-2008	<input checked="" type="checkbox"/>	28-APR-2008
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

Additional Requirements

Status	Status Date	Established Date	Satisfied	SBGI	Packaging	Memo Disbursement	Letter	Info Access	Fund	System	Requirement Description
R	27-OCT-2008	27-OCT-2008	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>	M	Renter's Agreement
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Steps

Follow the steps to enable a student's non-coded tracking requirement to be displayed on Banner Financial Aid Self-Service.

1. Access the Applicant Requirements Form (RRAAREQ).
2. Enter an aid year in the **Aid Year** field and a student ID in the **ID** field.
3. Perform a **Next Block** function twice to navigate to the Additional Requirements block.
4. Check the **Information Access** checkbox for each non-coded requirement you want to display on Banner Financial Aid Self-Service for this particular student.
5. Click the **Save** icon.
6. Click the **Exit** icon.

Note: Tracking Status does NOT affect what items display on Banner Financial Aid Self-Service; however, satisfied tracking requirements will display separately from unsatisfied tracking requirements.

Purpose

The Funds Management Form (RFRMGMT) allows you to indicate if a promissory note for a specific fund should display on Banner Financial Aid Self-Service.

Banner form

The screenshot displays the Banner Funds Management Form (RFRMGMT) with the following fields and options:

Aid Year: 0708 **Fund Code:** DIRECT Federal Direct Stafford Loan

Navigation Tabs: Fund, Packaging, Disbursement, Disbursement Locks, Fund Comments, Budget, Detail Code Rules, Tracking, Messages, Copy

Fields:

- Award Maximum:** 10,500.00
- Award Minimum:** .00
- Offer Status:** OFRD Offered
- Accept Status:** ACPT Accepted
- Decline Status:** DECL Declined
- Web Accept Status:** ACPT Accepted
- Web Decline Status:** DECL Declined
- Rebate Fee Percentage:** 1.5
- Loan Fee Percentage:** 2
- Interest Rate:** [Empty]
- Direct Loan Indicator:** S=Subsidized
- Electronic Loan Indicator:** (None)
- Manual Loan Indicator:** (None)
- Self Help Reduction Percentage:** [Empty]
- LMS Loan Fund:** [Empty]
- Alternative Loan Program Type:** [Empty]
- ACG Grade Level:** (None)
- SMART Grade Level:** (None)
- TEACH Level:** (None)
- Round Award:** 001
- Round Schedule:** RC=Round Cents
- Memo Credit:** A=Accepted
- Disburse:** N=No disbursement

Options:

- Automatic Packaging
- Automatic Scheduling
- Automatic Acceptance
- Award Using Estimated EFC
- Override Need
- Override Need to Cost of Attendance
- Override Satisfactory Academic Progress
- Override Requirement
- Replace EFC
- Reduce Need
- Loan Process
- Need Analysis
- Award Letter
- Web Accept Flag
- Allow Web Lender Selection
- Display PN Requirement on Web
- Equity Fund
- Eligible to Roll
- Count for NCAA

Steps

Follow the steps to enable a Promissory Note (from the **Additional Requirements** tab on RRAAREQ) to be displayed on Banner Financial Aid Self-Service. This is most often used for Direct Loan Promissory Notes.

1. Access the Funds Management Form (RFRMGMT).
2. Enter an aid year in the **Aid Year** field and a fund code in the **Fund Code** field.

Note: This is most often used for Direct Loans. It is not used for FFELP MPN or Perkins MPN.

3. Perform a **Next Block** function twice to navigate to the **Packaging** tab.

4. Check the **Display PN Requirement on Web** checkbox for each fund that has a Promissory Note maintained in the Promissory Note block of the Applicant Requirements Form (RRAAREQ), and that you want to display on Banner Financial Aid Self-Service for this particular student.
5. Click the **Save** icon.
6. Repeat for additional funds and promissory notes.

4. Uncheck the **Information Access** checkbox in the Budget Type block if you do not want the COA to display on Banner Financial Aid Self-Service for this particular student.
5. Click the **Save** icon.
6. Click the **Exit** icon.

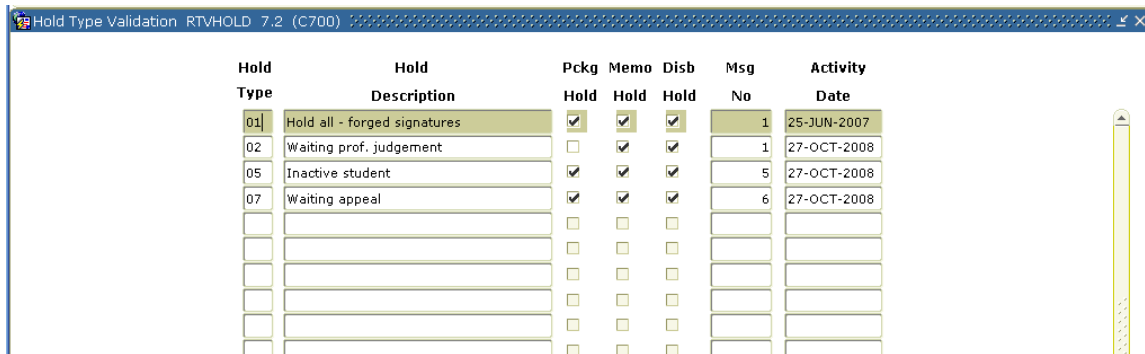
Note: Budget total and detail will display on the initial Financial Aid Status page unless you disable this with Web Tailor. Use batch posting to change the setting of 'Information Access' indicators. Design the appropriate population selections to use for batch posting these items. Use the 'BA' Budget Level Info Access Indicator option to batch post the info access indicator to Y or N for students in your population selection.

Financial Aid Holds

Purpose

The Hold Type Validation Form (RTVHOLD) allows you to define financial aid hold codes and indicate if these holds should display on Banner Financial Aid Self-Service.

Banner form



Hold Type	Hold Description	Pkg Hold	Memo Hold	Disb Hold	Msg No	Activity Date
01	Hold all - forged signatures	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	25-JUN-2007
02	Waiting prof. judgement	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	27-OCT-2008
05	Inactive student	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	27-OCT-2008
07	Waiting appeal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	6	27-OCT-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"/>		
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Steps

Follow the steps to enable Financial Aid holds to be displayed on Banner Financial Aid Self-Service.

1. Access the Hold Type Validation Form (RTVHOLD).
2. Enter a number in the **Msg No** field to enable a specific hold to display on Banner Financial Aid Self-Service. Hold description and reason (from ROAHOLD) will display on Banner Financial Aid Self-Service. Message 'no reason given' will display if the reason is blank.

Note: If using VR (Voice Response), the Message Number corresponds to the message they will hear; enter the appropriate code. Message numbers range from 3000 to 3999, each being a pre-assigned recorded message. If you are not using VR, a message number is still needed but you can use '1' (or any number).

3. Click the **Save** icon.
4. Repeat these steps to enable additional holds you wish to display on Banner Financial Aid Self-Service.

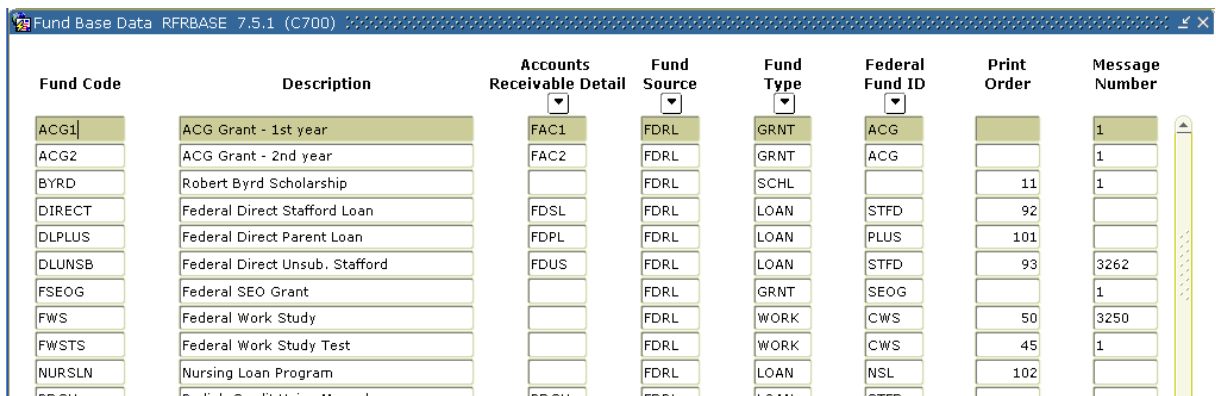
Note: Hold description (from the Hold Type Validation Form (RTVHOLD)) and reason (from the Applicant Holds Form (ROAHOLD)) will display on Banner Financial Aid Self-Service. The message 'No reason given' will display if the reason is blank on ROAHOLD. Holds that prevent packaging will NOT prevent student awards from displaying on Banner Financial Aid Self-Service if the student was already packaged any funds.

Award Information Display

Purpose

The Fund Base Data Form (RFRBASE) allows you to define financial aid fund codes and descriptions and indicate which funds should display on Banner Financial Aid Self-Service.

Banner form



Fund Code	Description	Accounts Receivable Detail	Fund Source	Fund Type	Federal Fund ID	Print Order	Message Number
ACG1	ACG Grant - 1st year	FAC1	FDRL	GRNT	ACG		1
ACG2	ACG Grant - 2nd year	FAC2	FDRL	GRNT	ACG		1
BYRD	Robert Byrd Scholarship		FDRL	SCHL		11	1
DIRECT	Federal Direct Stafford Loan	FDSL	FDRL	LOAN	STFD	92	
DLPLUS	Federal Direct Parent Loan	FDPL	FDRL	LOAN	PLUS	101	
DLUNSB	Federal Direct Unsub. Stafford	FDUS	FDRL	LOAN	STFD	93	3262
FSEOG	Federal SEO Grant		FDRL	GRNT	SEOG		1
FWS	Federal Work Study		FDRL	WORK	CWS	50	3250
FWSTS	Federal Work Study Test		FDRL	WORK	CWS	45	1
NURSLN	Nursing Loan Program		FDRL	LOAN	NLS	102	

Steps

Follow the steps to enable funds to display on Banner Financial Aid Self-Service.

1. Access the Fund Base Data Form (RFRBASE).
2. Enter a number in the **Message Number** field to enable a specific fund to display on Banner Financial Aid Self-Service.

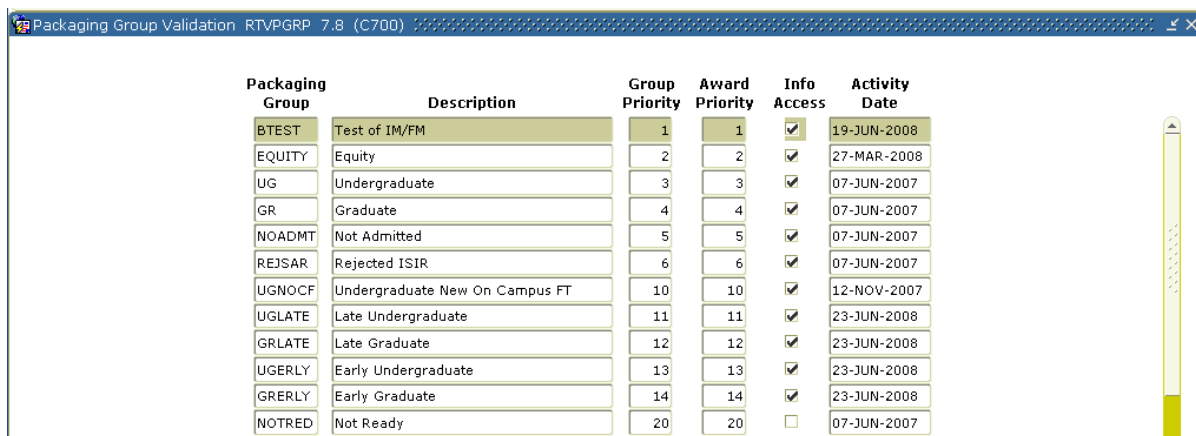
Note: If using VR (Voice Response), the Message Number corresponds to the message they will hear; enter the appropriate code. Message numbers range from 3000 to 3999, each being a pre-assigned recorded message. If you are not using VR, a message number is still needed but you can use '1' (or any number).

3. Click the **Save** icon.
4. Repeat these steps to enable additional statuses to display on Banner Financial Aid Self-Service.

Purpose

The Packaging Group Validation Form (RTVPGRP) allows you to define packaging groups should allow display of award information on Banner Financial Aid Self-Service.

Banner form



Packaging Group	Description	Group Priority	Award Priority	Info Access	Activity Date
BTEST	Test of IM/FM	1	1	<input checked="" type="checkbox"/>	19-JUN-2008
EQUITY	Equity	2	2	<input checked="" type="checkbox"/>	27-MAR-2008
UG	Undergraduate	3	3	<input checked="" type="checkbox"/>	07-JUN-2007
GR	Graduate	4	4	<input checked="" type="checkbox"/>	07-JUN-2007
NOADMT	Not Admitted	5	5	<input checked="" type="checkbox"/>	07-JUN-2007
REJSAR	Rejected ISIR	6	6	<input checked="" type="checkbox"/>	07-JUN-2007
UGNOCF	Undergraduate New On Campus FT	10	10	<input checked="" type="checkbox"/>	12-NOV-2007
UGLATE	Late Undergraduate	11	11	<input checked="" type="checkbox"/>	23-JUN-2008
GRLATE	Late Graduate	12	12	<input checked="" type="checkbox"/>	23-JUN-2008
UGERLY	Early Undergraduate	13	13	<input checked="" type="checkbox"/>	23-JUN-2008
GRERLY	Early Graduate	14	14	<input checked="" type="checkbox"/>	23-JUN-2008
NOTRED	Not Ready	20	20	<input type="checkbox"/>	07-JUN-2007

Steps

Follow the steps to enable student in particular packaging groups to see their awards on Banner Financial Aid Self-Service.

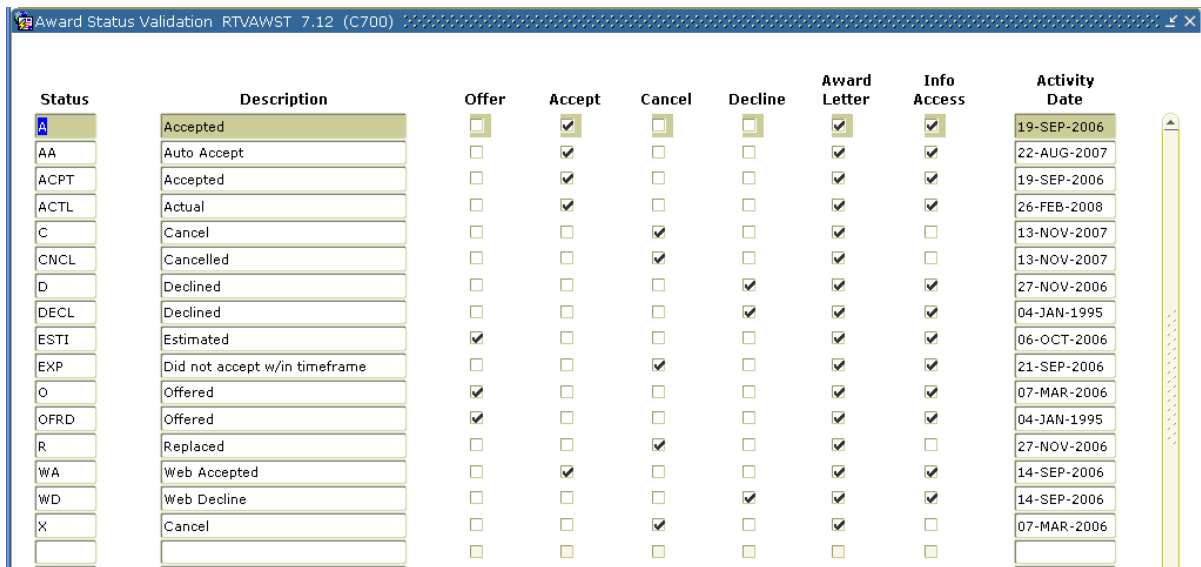
1. Access the Packaging Group Validation Form (RTVPGRP).
2. Click the **Info Access** checkbox to allow packages for student in each group to display on Banner Financial Aid Self-Service.
3. Click the **Save** icon.
4. Repeat these steps to enable additional groups to allow packaged to display on Banner Financial Aid Self-Service.

Note: Does not display a student's group code or description anywhere on Banner Financial Aid Self-Service. Students that are not in a packaging group will still have awards display if the fund is set up to display on the Fund Base Data Form (RFRBASE).

Purpose

The Award Status Validation Form (RTVAWST) allows you to define fund award statuses and indicate which statuses should allow funds to display on Banner Financial Aid Self-Service.

Banner form



Status	Description	Offer	Accept	Cancel	Decline	Award Letter	Info Access	Activity Date
A	Accepted	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	19-SEP-2006
AA	Auto Accept	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	22-AUG-2007
ACPT	Accepted	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	19-SEP-2006
ACTL	Actual	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	26-FEB-2008
C	Cancel	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	13-NOV-2007
CNCL	Cancelled	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	13-NOV-2007
D	Declined	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	27-NOV-2006
DECL	Declined	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-JAN-1995
ESTI	Estimated	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	06-OCT-2006
EXP	Did not accept w/in timeframe	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	21-SEP-2006
O	Offered	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	07-MAR-2006
OFRD	Offered	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04-JAN-1995
R	Replaced	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	27-NOV-2006
WA	Web Accepted	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	14-SEP-2006
WD	Web Decline	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	14-SEP-2006
X	Cancel	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	07-MAR-2006
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Steps

Follow the steps to enable funds in a specific award status to display on Banner Financial Aid Self-Service.

1. Access the Award Status Validation Form (RTVAWST).
2. Click the **Info Access** checkbox to allow funds in that status to display on Banner Financial Aid Self-Service.
3. Click the **Save** icon.
4. Repeat these steps to enable additional statuses to display on Banner Financial Aid Self-Service.

Purpose

The Award Maintenance Form (RPAAWRD) allows you to change a student's specific fund or entire award to not display on Banner Financial Aid Self-Service.

Banner form

Fund	Description	Status	Lock	Information Access	System
COOLEY	The Cooley Excellence Scholars	A	N	<input checked="" type="checkbox"/>	M
DIRECT	Federal Direct Stafford Loan	A	N	<input checked="" type="checkbox"/>	M
DLUNSB	Federal Direct Unsub. Stafford	O	N	<input checked="" type="checkbox"/>	S
GBS	Geoffrey Bourne Schoarship	A	N	<input checked="" type="checkbox"/>	M
LSSCH	Lakisha Scholarship	A	N	<input checked="" type="checkbox"/>	S
PELL	Federal Pell Grant	AA	N	<input checked="" type="checkbox"/>	S
PERK	Federal Perkins Loan	OFRD	N	<input checked="" type="checkbox"/>	S
				<input type="checkbox"/>	

Summary Packaging Group

Group: LTEST Lakish'a test Award Letter Package Date: 23-OCT-2008

Additional Stafford: Default Pell Origination Packaging Lock

Borrower Based: Post Bachelor's Degree Pell Override Information Access

Dependency: I HPPA Group Lock

Preparatory or Teacher Certification: N=No Subsidized Loan Exclusion Amount:

Steps

Follow the steps to disable a student's specific fund from displaying on Banner Financial Aid Self-Service.

1. Access the Award Maintenance Form (RPAAWRD).
2. Enter an aid year in the **Aid Year** field and a student ID in the **ID** field.
3. Perform a **Next Block** function.
4. Click on the **Locks/Indicators** Tab.
5. Uncheck the **Information Access** checkbox for each fund you do not want to display on Banner Financial Aid Self-Service for this particular student.
6. Click the **Save** icon.

Note: Awards total on the initial Financial Aid Status page and Award Package will include only funds with info access checked. Use the batch posting to change the setting of 'Information Access' indicators. Design the appropriate population selections to use for batch posting these items. Use the 'AS' Award Level Access Indicator option to batch post

the info access indicator on a specific fund for students in your population selection.

Steps

Follow the steps to disable a student's entire award from displaying on Banner Financial Aid Self-Service.

1. Access the Award Maintenance Form (RPAAWRD).
2. Enter an aid year in the **Aid Year** field and a student ID in the **ID** field.
3. Perform a **Next Block** function twice to get to the **Summary** Tab.
4. Click on the **Packaging Group** Tab.
5. Uncheck the **Information Access** checkbox to prevent all awards from displaying on Banner Financial Aid Self-Service for this particular student.

Note: The default is 'Y' (checked). However, the fund must also have a message number populated on RFRBASE for it to show on Banner Financial Aid Self-Service.

6. Click the **Save** icon.

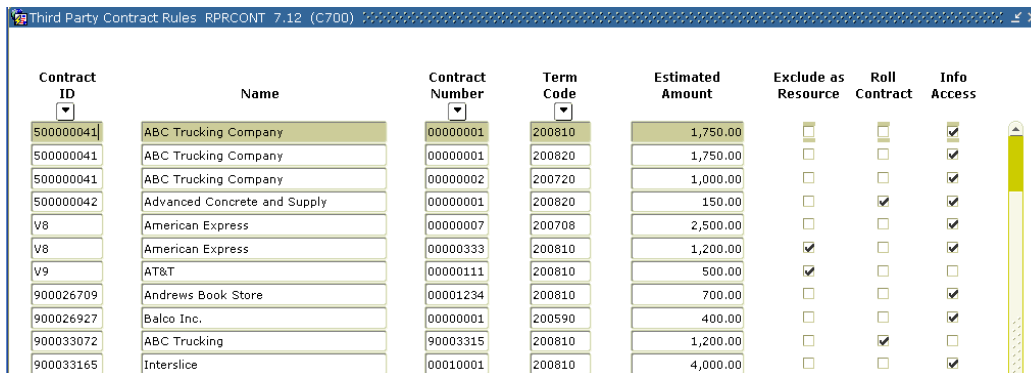
Note: Use batch posting to change the setting of 'Information Access' indicators. Design the appropriate population selections to use for batch posting these items. Use the 'AA' Award Level Access Indicator option to batch post the info access indicator on a specific fund for students in your population selection.

Contracts and Exemptions

Purpose

The Third Party Contract Rules Form (RPRCONT) allows you to identify which contracts should display on Banner Financial Aid Self-Service.

Banner form



The screenshot shows a web browser window titled "Third Party Contract Rules: RPRCONT 7.12 (C700)". It displays a table with the following columns: Contract ID, Name, Contract Number, Term Code, Estimated Amount, Exclude as Resource, Roll Contract, and Info Access. The table contains 13 rows of contract data.

Contract ID	Name	Contract Number	Term Code	Estimated Amount	Exclude as Resource	Roll Contract	Info Access
500000041	ABC Trucking Company	00000001	200810	1,750.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
500000041	ABC Trucking Company	00000001	200820	1,750.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
500000041	ABC Trucking Company	00000002	200720	1,000.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
500000042	Advanced Concrete and Supply	00000001	200820	150.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
V8	American Express	00000007	200708	2,500.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
V8	American Express	00000333	200810	1,200.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
V9	AT&T	00000111	200810	500.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
900026709	Andrews Book Store	00001234	200810	700.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
900026927	Balco Inc.	00000001	200590	400.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
900033072	ABC Trucking	90003315	200810	1,200.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
900033165	Interslice	00010001	200810	4,000.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Steps

Follow the steps to enable a contract to display on Banner Financial Aid Self-Service.

1. Enter a valid contract ID in the **Contract ID** field or choose the dropdown to search for a contract ID.
2. Choose the dropdown to search for a valid contract number and select. This will bring back the valid contract number in the **Contract Number** field and the appropriate term code in the **Term Code** field.
3. Enter an estimated amount if you would like to use an estimated amount from RPRCONT.
4. Check the **Information Access** checkbox to allow this contract to display via Banner Financial Aid Self-Service.

Note: This field can only be checked with the Exclude as Resource indicator is unchecked.

5. Click the **Save** icon.
6. Repeat these steps to enable additional contracts to display on Banner Financial

Purpose

The Exemption Rules Form (RPREXPT) allows you to identify which exemptions should display on Banner Financial Aid Self-Service.

Banner form

Term	Exemption	Description	Estimated Amount	Exclude as Resource	Roll Exemption	Info Access
199610	01	Faculty/Staff Child	9,500.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
199510	1	Faculty/Staff Child	8,500.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
200810	156	Testing Exemption Estimates	99.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
200820	18522	Test Exemption	5,000.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
200810	1974	Exemption Sample	1,500.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
200810	321	Bridget Exemption	5,000.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
200820	321	Bridget Exemption	5,000.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
200590	455	Test MS	1,000.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
200810	5000	New Exemption	3,000.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
200708	7777	Full Exemption	4,000.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
200810	7777	Full Exemption	8,765.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Steps

Follow the steps to enable an exemption to display on Banner Financial Aid Self-Service.

1. Access the Exemptions Rules Form (RPREXPT).
2. Enter the appropriate term code in the **Term Code** field or choose the dropdown to select a term code.
3. Enter a valid exemption code in the **Exemption** field or choose the dropdown to search for an exemption code.
4. Enter an estimated amount for this exemption.
5. Check the **Information Access** checkbox to allow this exemption to display via Banner Financial Aid Self-Service.

Note: This field can only be checked with the **Exclude as Resource** indicator is unchecked.

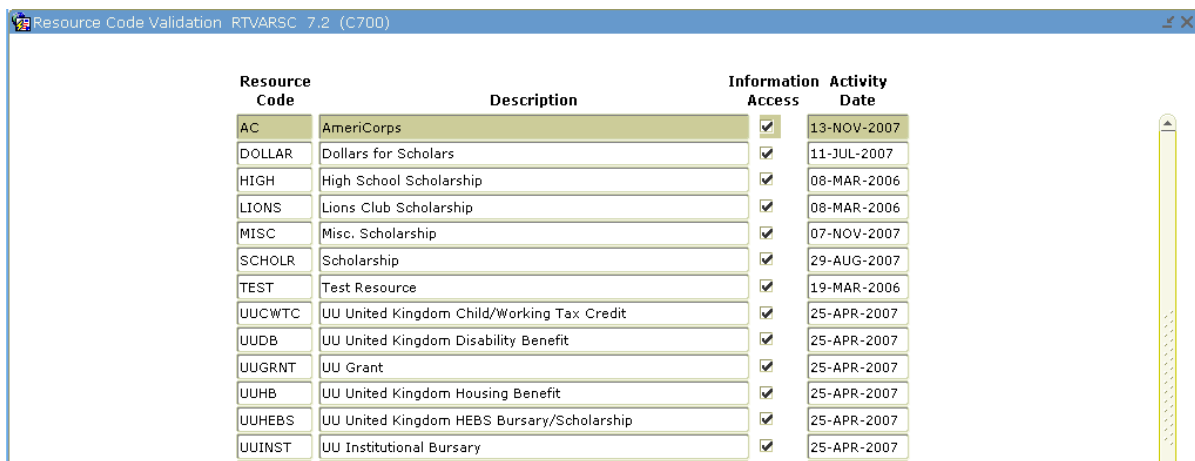
6. Click the **Save** icon.
7. Repeat these steps to enable additional exemptions to display on Banner Financial Aid Self-Service.

Outside Resources

Purpose

The Resource Code Validation Form (RTVARSC) allows you define outside resources and identify which resources should display on Banner Financial Aid Self-Service.

Banner form



The screenshot shows a window titled "Resource Code Validation RTVARSC 7.2 (C700)". It contains a table with the following columns: Resource Code, Description, Information Access, and Activity Date. The table lists various resource codes and their corresponding descriptions, with checkboxes in the Information Access column and dates in the Activity Date column.

Resource Code	Description	Information Access	Activity Date
AC	AmeriCorps	<input checked="" type="checkbox"/>	13-NOV-2007
DOLLAR	Dollars for Scholars	<input checked="" type="checkbox"/>	11-JUL-2007
HIGH	High School Scholarship	<input checked="" type="checkbox"/>	08-MAR-2006
LIONS	Lions Club Scholarship	<input checked="" type="checkbox"/>	08-MAR-2006
MISC	Misc. Scholarship	<input checked="" type="checkbox"/>	07-NOV-2007
SCHOLR	Scholarship	<input checked="" type="checkbox"/>	29-AUG-2007
TEST	Test Resource	<input checked="" type="checkbox"/>	19-MAR-2006
UUCWTC	UU United Kingdom Child/Working Tax Credit	<input checked="" type="checkbox"/>	25-APR-2007
UUDB	UU United Kingdom Disability Benefit	<input checked="" type="checkbox"/>	25-APR-2007
UUGRNT	UU Grant	<input checked="" type="checkbox"/>	25-APR-2007
UUHB	UU United Kingdom Housing Benefit	<input checked="" type="checkbox"/>	25-APR-2007
UUHEBS	UU United Kingdom HEBS Bursary/Scholarship	<input checked="" type="checkbox"/>	25-APR-2007
UUIINST	UU Institutional Bursary	<input checked="" type="checkbox"/>	25-APR-2007

Steps

Follow the steps to enable outside resources to be displayed on Banner Financial Aid Self-Service.

1. Access the Resource Code Validation Form (RTVARSC).
2. Click the **Information Access** checkbox for outside resource to display on Banner Financial Aid Self-Service.
3. Click the **Save** icon.
4. Repeat these steps to enable additional outside resources you wish to display on Banner Financial Aid Self-Service.

Purpose

The Resource Maintenance Form (RPAARSC) allows you to change a student's specific resource to not display on Banner Financial Aid Self-Service.

Banner form

Other Resources					Amounts	
Resource:	LIONS	Lions Club Scholarship			Estimated:	
Term:	200820	Type: 0	Number: 1	<input checked="" type="checkbox"/> Info Access	Actual:	200.00
Resource:					Estimated:	
Term:		Type: 0	Number: 0	<input type="checkbox"/> Info Access	Actual:	

Steps

Follow the steps to disable a student's specific outside resource from displaying on Banner Financial Aid Self-Service.

1. Access the Resource Maintenance Form (RPAARSC).
2. Enter an aid year in the **Aid Year** field and a student ID in the **ID** field.
3. Perform a **Next Block** function.
4. Uncheck the **Information Access** checkbox for each outside resource you do not want to display on Banner Financial Aid Self-Service for this particular student.

Note: the default 'Y' will already be checked if the Resource Code Validation Form (RTVARSC) was setup to globally display this resource. However, even if it is checked on RPAARSC, the resources must also have the Information Access Indicator checked on RTVARSC to display on Banner Financial Aid Self-Service.

5. Click the **Save** icon.
6. Repeat these steps to enable additional outside resources you wish to display on Banner Financial Aid Self-Service.

Steps

Follow the steps to enable a student's non-coded outside resource to be displayed on Banner Financial Aid Self-Service.

1. Access the Resource Maintenance Form (RPAARSC).
2. Enter an aid year in the **Aid Year field** and a student ID in the **ID** field.
3. Perform a **Next Block** function.
4. Check the **Information Access** checkbox for each non-coded outside resource you want to display on Banner Financial Aid Self-Service for this particular student.
5. Click the **Save** icon.

Note: The Calculated Resource Total displayed will include all resources from RPAARSC. The total displayed and the resource listing will only display funds with 'Info Access' checked on the Resource Code Validation Form (RTVARSC). A note appears indicating "If you have any questions regarding any difference between the above total amounts and your calculated total, please contact the Financial Aid Office." Separate columns for Expected and Actual Amounts will display. The Term Code will display if it is entered on the Resource Maintenance Form (RPAARSC), otherwise it will display as 'Not Applicable'.

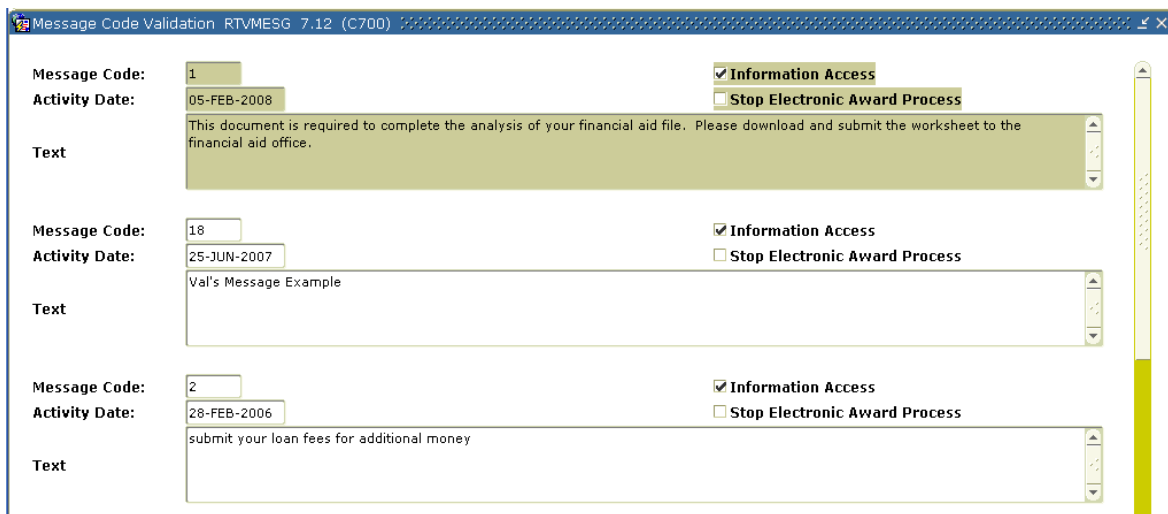
Basic Messages

Purpose

The Message Code Validation Form (RTVMESG) allows you build messages and indicate which messages should display on Banner Financial Aid Self-Service.

Note: All non-coded student messages on ROAMESG Applicant Message Form will display, unless it expired.

Banner form



The screenshot shows a web application window titled "Message Code Validation RTVMESG 7.12 (C700)". It contains three message entry forms. Each form has fields for "Message Code", "Activity Date", and "Text". To the right of each form are two checkboxes: "Information Access" and "Stop Electronic Award Process".

Message Code	Activity Date	Text	Information Access	Stop Electronic Award Process
1	05-FEB-2008	This document is required to complete the analysis of your financial aid file. Please download and submit the worksheet to the financial aid office.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
18	25-JUN-2007	Val's Message Example	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	28-FEB-2006	submit your loan fees for additional money	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Steps

Follow the steps to enable messages to be displayed on Banner Financial Aid Self-Service.

1. Access the Message Code Validation Form (RTVMESG).
2. Click the **Information Access** checkbox for messages you wish to display on Banner Financial Aid Self-Service.

Note: Students may see checked messages attached to a tracking document using a link below listed unsatisfied requirements. Students may see messages attached to a fund by clicking the appropriate fund code and a pop up window will display the fund message or from an award messages link. Messages attached to budget groups will not display on Banner Financial Aid Self-Service. Messages attached directly to a student on the Applicant Messages Form (ROAMESG) will only be seen from a link on the Financial Aid Status page.

3. Click the **Save** icon.
4. Repeat these steps to enable additional messages you wish to display on Banner Financial Aid Self-Service.

Display Lender URL Information

Purpose

The Lender Base Data Form (RPRLNDR) allows you to maintain lender information and indicate if this lender should display on Banner Financial Aid Self-Service. In addition, you can define a specific lender URL and URL Description to be viewable in the Loan History section of Banner Financial Aid Self-Service.

Banner form

The screenshot shows the Lender Base Data Form (RPRLNDR) with the following fields and values:

- Lender Code:** 800202
- Name:** Bank One
- Contact:** Sally Jones
- Address:** 678 Bank One Street
- Activity Date:** 27-OCT-2008
- City:** Madison
- State or Province:** SD
- Zip or Postal Code:** 57042
- Nation:** (dropdown menu)
- Telephone:** (three input fields)
- Information Access:** (checked)
- Lender ID:** 800202
- Guarantor ID:** 755
- Pre-Disbursement Recipient:** 755
- Post-Disbursement Recipient:** 755
- Number of Days for Changes:** 25
- URL Description:** (input field)
- URL:** (input field)

Participation Table:

Active	Program	Inactive Date	Inactive Ending Year
<input checked="" type="checkbox"/>	S=Stafford	31-DEC-2099	2099
<input checked="" type="checkbox"/>	P=Parent PLUS	31-DEC-2099	2099
<input checked="" type="checkbox"/>	G=Graduate PLUS	31-DEC-2099	2099
<input type="checkbox"/>			

Note: Setting up default lender description and URL is discussed in the Basic Overall Banner Financial Aid Self-Service Controls Section of this Workbook.

Steps

Follow the steps to set other lender's URL for Banner Financial Aid Self-Service.

1. Access the Lender Base Data Form (RPRLNDR).
2. Enter a Lender Code in the **Lender Code** field.
3. Perform a **Next Block** function.
4. Check **Information Access Indicator** if you want the lender to display on the lender list.

Note: Only active lenders will show in the lender list.

5. Enter a description for this lender's URL in the **URL Description** field.
6. Enter the URL for this lender in the **URL** field.

Note: If you leave the lender specific URL blank on RPRLNDR, the default URL on ROIANST will display.

7. Click the **Save** icon.
8. Repeat for additional lenders.

Note: When a student selects a lender via Banner Financial Aid Self-Service, it will automatically update the student's lender on RPASLND for that loan type.

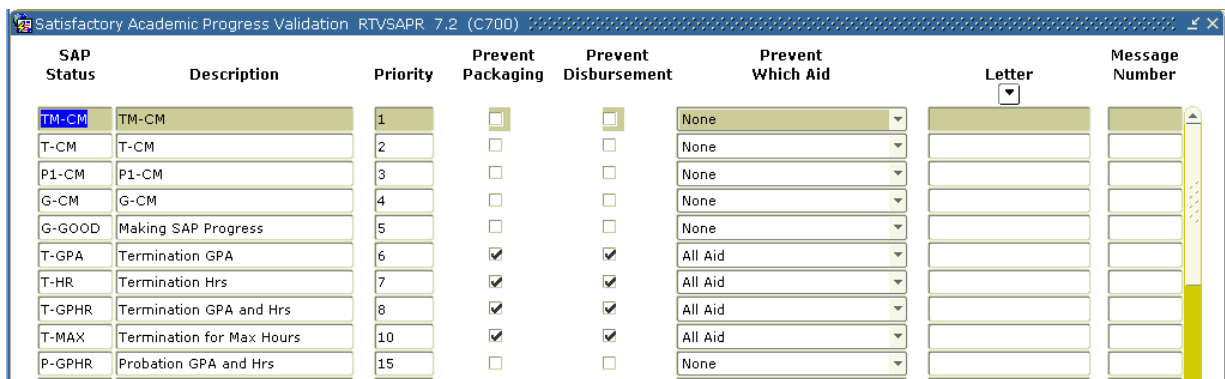
Satisfactory Academic Progress

Purpose

The Satisfactory Academic Progress (SAP) description from the Satisfactory Academic Progress Validation form (RTVSAPR) will display for each student according to their SAP codes assigned on ROASTAT.

Note: There are no controls within Banner. All SAP statuses will display on Banner Financial Aid Self-Service with effective term unless you disable the link with Web Tailor. SAP Status history and term codes will also display when viewing the Academic Progress Link via Banner Financial Aid Self-Service.

Banner form



SAP Status	Description	Priority	Prevent Packaging	Prevent Disbursement	Prevent Which Aid	Letter	Message Number
TM-CM	TM-CM	1	<input type="checkbox"/>	<input type="checkbox"/>	None		
T-CM	T-CM	2	<input type="checkbox"/>	<input type="checkbox"/>	None		
P1-CM	P1-CM	3	<input type="checkbox"/>	<input type="checkbox"/>	None		
G-CM	G-CM	4	<input type="checkbox"/>	<input type="checkbox"/>	None		
G-GOOD	Making SAP Progress	5	<input type="checkbox"/>	<input type="checkbox"/>	None		
T-GPA	Termination GPA	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All Aid		
T-HR	Termination Hrs	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All Aid		
T-GPHR	Termination GPA and Hrs	8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All Aid		
T-MAX	Termination for Max Hours	10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All Aid		
P-GPHR	Probation GPA and Hrs	15	<input type="checkbox"/>	<input type="checkbox"/>	None		

Logging into Banner Financial Aid Self-Service

Purpose

The Third Party Access Audit Form (GOATPAD) displays the history of a student's user ID and allows you to change the PIN number to access Banner Financial Aid Self-Service.

Banner form

User ID	Activity Date
FAISUSR	22-JAN-2009
FAISUSR	21-JAN-2009
FAISUSR	22-NOV-2008
WWW_USER	27-SEP-2008
FAISUSR	27-SEP-2008
FAISUSR	27-SEP-2008
FAISUSR	06-JUL-2008

Steps

Follow the steps to change a student's PIN number..

1. Access the Third Party Access Audit Form (GOATPAD).
2. Enter student ID in the **ID** field.
3. Perform a **Next Block** function.
4. Enter the new PIN in the **PIN** field (it will display as all asterisks).
5. Re-enter the new PIN in the **Confirm New Pin** field.

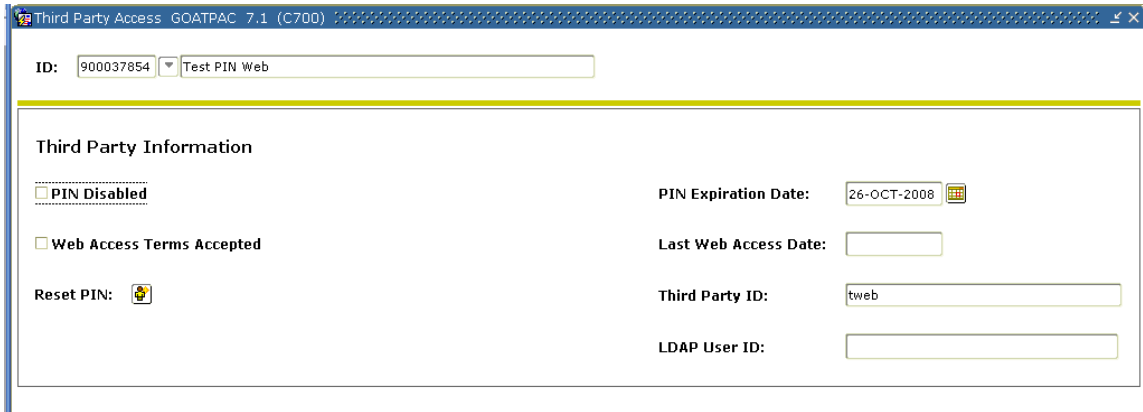
6. Click the **Save** icon.

7. Click the **Exit** icon.

Purpose

The Third Party Access Form (GOATPAC) allows a user to disable or reset a student's PIN number and view when they last access Banner Financial Aid Self-Service.

Banner form




Third Party Access GOATPAC 7.1 (C700)


ID: 900037854 Test PIN Web

Third Party Information

PIN Disabled

Web Access Terms Accepted

Reset PIN: 

PIN Expiration Date: 26-OCT-2008 

Last Web Access Date:

Third Party ID: tweb

LDAP User ID:

Steps

Follow the steps to reset or disable a student's PIN number.

1. Access the Third Party Access Form (GOATPAC).
2. Enter the student ID in the **ID** field.
3. Perform a **Next Block** function.
4. Click the **Reset Pin** icon.
5. Click the **PIN Disabled** check box to disable a student from accessing Banner Financial Aid Self-Service.
6. Click the **Save** icon.
7. Click the **Exit** icon.

Note: There is no master user ID and PIN for staff to use for access to Banner Financial Aid Self-Service.

Purpose

Crosswalk Validation (GTVSDAX) allows an institution to define when a student's PIN is first created. If you want a PIN created when a student exists first in Financial Aid, you would use the entry for the RORSTAT Code.

Banner form

The screenshot shows a web browser window titled "Crosswalk Validation GTVSDAX 7.1 (C700)". The form is divided into four sections, each representing a different code entry. Each section includes fields for Code, Sequence, Group, Description, Reporting Date, External Code, Translation Code, and Activity Date. A "System Required" checkbox is present in each section.

Code	Sequence	Group	Description	Reporting Date	External Code	Translation Code	Activity Date	System Required
PEBEMPL		CREATEPIN	Create pin for PEBEMPL?		Y		08-DEC-2006	<input type="checkbox"/>
RORSTAT		CREATEPIN	Create PIN for RORSTAT ?		Y		08-JUL-2008	<input type="checkbox"/>
SARADAP		CREATEPIN	Create PIN for SAAADMS ?		Y		10-APR-2006	<input type="checkbox"/>
SGBSTDN		CREATEPIN	Create PIN for SGASTDN ?		Y		20-JAN-2005	<input type="checkbox"/>

Steps

Follow the steps to enable a PIN to be created when a student only exists in the Financial Aid System.

1. Access the Crosswalk Validation Form (GTVSDAX).
2. Select the **Enter Query** button.
3. Enter *CREATEPIN* in the **Group** Field.
4. Select the **Execute Query** button.
5. Locate the Code RORSTAT.
6. Update the **External Code** field to *Y*.
7. Click the **Save** icon.
8. Select the **Exit** icon.

Purpose

Student will click on your link to Banner Financial Aid Self-Service. Sample information is displayed below.

Note: Your institution's information may look different.

Steps

Follow these steps to log in to Banner Financial Aid Self-Service as a student.

1. Access your institution's Banner Financial Aid Self-Service Banner website.
2. Click on the **Enter Secure Area** button.
3. Enter the User ID in the **User ID** field and PIN in the **PIN** field (found on GOATPAD in prior exercise).
4. Click the **Login** button.



Welcome to SUNGARD

- [Enter Secure Area](#)
- [Prospective Students](#)
- [Apply for Admission](#)
- [General Financial Aid](#)
- [Campus Directory](#)
- [Class Schedule](#)
- [Course Catalog](#)
- [Alumni and Friends](#)

RELEASE: 7.4



Please enter your User Identification Number (ID) and your Personal Identification Number (PIN). When finished, select Login.

Please Note: ID is Case Sensitive

To protect your privacy, please Exit and close your browser when you are finished.

User ID:

PIN:

RELEASE: 7.4

Basic Web Tailor

Banner Financial Aid Self-Service contains a web menu/procedure for each of the Banner modules. If a person has the role of web tailor for any of the Banner modules, there will be a corresponding link to the Web Tailor on their login page.

The role of Web Tailor consists of designing the look and feel of the web pages, information text and additional HTML links to other informative web pages if desired. The key to Web Tailor is to find the menus and know where the text and design will show on the user's page. Upon the installation of the Self-Service products, the data within the Web Tailor pages are loaded into Oracle tables. This is a similar concept to "Seed" data upon Banner installations. A Web Tailor page is a door to the Self-Service pages, which hold the images, descriptions, links, etc. of the web pages within the Self-Service environment. Changing the verbiage, adding links or otherwise customizing the Web Tailor pages, the Oracle tables that store the data will also be updated with these changes. The Web Tailor menu consists of a baseline copy of all the web pages/packages. Once a page is modified, a local copy is created. This allows for future upgrades to take place without overriding any customization a site has performed. Only one local copy is allowed per baseline copy, but it may be changed as many times as desired. Deleting a web page will completely remove the page from corresponding Oracle tables. If a page is no longer desired, simply disable it instead of deleting it; this will allow for future use of the page with minimal reinstatement labor.

Self Check

Directions

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

Question 1

You want to activate or inactivate Banner Financial Aid Self-Service entirely for an aid year. To do this, you should go to which of the below forms?

- a. Installation Controls Form (GUAINST).
- b. Third Party Access Form (GOATPAC).
- c. Funds Management Form (RFRMGMT).
- d. Institution Financial Aid Options Form (ROAINST).
- e. Resource Maintenance Form (RPAARSC).

Question 2

The student will not be able to see their Cost of Attendance anywhere on Banner Financial Aid Self-Service if you do not check the **Display COA Detail** checkbox on the **Web Processing Overview** Tab.

True or False.

Question 3

If you do not want any awards in Canceled status to display on Banner Financial Aid Self-Service, you would control this on the

- a) Funds Management Form (RFRMGMT).
- b) Award Status Validation Form (RTVAWST).
- c) Award Maintenance Form (RPAAWRD).
- d) Institution Financial Aid Options Form (ROAINST).
- e) Resource Maintenance Form (RPAARSC).

Answer Key for Self Check

Question 1

You want to activate or inactivate Banner Financial Aid Self-Service entirely for an aid year. To do this, you should go to which of the below forms?

- d) Institution Financial Aid Options Form (ROAINST).**

Question 2

The student will not be able to see their Cost of Attendance anywhere on Banner Financial Aid Self-Service if you do not check the **Display COA Detail** checkbox on the **Web Processing Overview** Tab.

False.

Question 3

If you do not want any awards in Canceled status to display on Banner Financial Aid Self-Service, you would control this on the

- b) Award Status Validation Form (RTVAWST).**

Advanced Tasks Operations



Introduction

Banner Financial Aid Self-Service Basic advanced functionality exists to allow the student to be more interactive in Banner Financial Aid Self-Service with the Financial Aid office. The topics contained in this section include display of the following areas:

- description of Advanced Banner Financial Aid Self-Service
- review of Banner Financial Aid Self-Service Main Menu
- review of Banner Financial Aid Self-Service Control Menu
- advanced Overall Banner Financial Aid Self-Service Controls
- award Acceptance On-line
- satisfy Award Letter or Terms and Conditions Tracking Requirements
- choose Lender On-line
- print and Display Award Letter
- web Questions and Answers
- processing Web Applicant Reported Information
- display Web Text
- advanced Web Tailor.

Objectives

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

- setup Banner Financial Aid Self-Service controls
- setup the display for funds and text
- setup display options
- manage award letter tracking requirements
- manage term and condition requirements
- enable students to select lenders online
- manage web questions
- review students' reported information
- manage web applicant response information.

Intended audience

Financial Aid office staff.

Banner Financial Aid Self-Service Advanced Controls

Purpose

On the Institution Financial Aid Options Form (ROAINST), you can set up basic overall Banner Financial Aid Self-Service Controls.

This form enables you to:

- indicate if you want to display Award Messages with Terms and Conditions
- indicate if you want to allow a Partial Amount Acceptance of Funds
- indicate if you want to allow a Full Amount of Acceptance of All Awards Option
- indicate if you want to allow Students to Submit Outside Resource Detail
- indicate if you want to allow Students to Submit Award Information
- indicate if you want to display the **Terms and Conditions** Tab
- indicate if you want to print the Terms and Conditions
- indicate if you want to display the **Accept Award Offer** Tab
- indicate if you want to display the **Special Messages** Tab.

Banner form

Institution Financial Aid Options ROAINST 7.12 (C700)

Aid Year: 0708

Options Loan Options Credit Hours Exclude Course Levels Defaults Campus/EDE Defaults **Web Processing Rules**

Information Access Indicator

Web Processing Rules

Display COA Detail
 Display Need Calculation
 Display Cumulative Loan Amounts
 Display Outside Resource Detail
 Display Award Messages with Terms and Conditions
 Allow Partial Amount Acceptance
 Allow Accept Full Amount of All Awards Option
 Allow Student to Submit Outside Resource Information
 Allow Student to Submit Award Information
 Display Housing Status

Display Terms with Zero Award Amount
 Display Funds with Zero Award Amount
 Display Resources/Additional Information Tab
 Display Terms and Conditions Tab
 Print Terms and Conditions
 Display Accept Award Offer Tab
 Display Special Messages Tab

Value for Null Info Access Indicator: Y=Use Y for Null Value
Display Enrollment Status: T=Term Enrollment
Default Lender URL Description: sallie mae
Default Lender URL: www.salliemae.com

Web Accept Tracking Rules Requirement Code	Description	Status	Description	Type Code
T&C	Terms and Conditions	S	Received and Satisfied	A = Award Acceptance
WEBAL	Web Award Ltr	S	Received and Satisfied	A = Award Acceptance

Steps

Follow the steps to complete the process.

1. Access the Institutional Financial Aid Options Form (ROAINST).
2. Enter an aid year in the **Aid Year** field.
3. Perform a **Next Block** function.
4. Click on the **Web Processing Rules** tab.
5. Click the **Information Access Indicator** checkbox to turn on Banner Financial Aid Self-Service for this aid year. This will allow students to choose this aid year from the dropdown Menu.

Note: The aid year description the student will see comes from the **Aid Year Description** field on ROAINST.
6. Click the **Display Award Messages with Terms and Conditions** checkbox to display award messages on the **Terms and Conditions** tab of Banner Financial Aid Self-Service.
7. Click the **Allow Partial Amount Acceptance** checkbox to allow students to accept only partial amount of a fund.

8. Click the **Allow Accept Full Amount of All Awards Option** checkbox to allow a student to click one button to accept all awards for the full amount.
9. Click the **Allow Student to Submit Outside Resources Information** checkbox to provide the student the capability to enter any outside resources they will receive and submit this information to you via Banner Financial Aid Self-Service.
10. Click the **Allow Students to Submit Award Information** checkbox if you want to make a comments section available on the **Accept Awards** Tab on Banner Financial Aid Self-Service.

Note: The **Display Award Offer Tab** checkbox must also be checked if you will want to allow the students to submit award information.

11. Click the **Display Terms and Conditions** checkbox to display a tab for Terms and Conditions. The terms and conditions text will be created by you using the Web Text functionality described later in this workbook.
12. Click the **Print Terms and Conditions** checkbox to cause the terms and conditions to print on an award letter when the student chooses to print from Banner Financial Aid Self-Service.
13. Click the **Display Award Offer Tab** checkbox if you intend to allow students to accept awards via Banner Financial Aid Self-Service. Additional setup is needed and discussed later in this workbook.
14. Click the **Display Special Messages Tab** checkbox if you intend to allow students to accept awards via Banner Financial Aid Self-Service. The student special messages text will be created by you using the Web Text functionality described later in this workbook.
15. Click the **Save** icon to save any changes.
16. Click the **Exit** icon.

Award Acceptance Online

Banner form

Institution Financial Aid Options ROAINST 7.12 (C700)

Aid Year: 0708

Options Loan Options Credit Hours Exclude Course Levels Defaults Campus/EDE Defaults **Web Processing Rules**

Information Access Indicator

Web Processing Rules

Display COA Detail

Display Need Calculation

Display Cumulative Loan Amounts

Display Outside Resource Detail

Display Award Messages with Terms and Conditions

Allow Partial Amount Acceptance

Allow Accept Full Amount of All Awards Option

Allow Student to Submit Outside Resource Information

Allow Student to Submit Award Information

Display Housing Status

Display Terms with Zero Award Amount

Display Funds with Zero Award Amount

Display Resources/Additional Information Tab

Display Terms and Conditions Tab

Print Terms and Conditions

Display Accept Award Offer Tab

Display Special Messages Tab

Value for Null Info Access Indicator: Y=Use Y for Null Value

Display Enrollment Status: T=Term Enrollment

Default Lender URL Description: sally mae

Default Lender URL: www.sallymae.com

Web Accept Tracking Rules

Requirement Code	Description	Status	Description	Type Code
T&C	Terms and Conditions	S	Received and Satisfied	A = Award Acceptance
WEBAL	Web Award Ltr	S	Received and Satisfied	A = Award Acceptance

Steps

Follow the steps to allow students to accept awards via Banner Financial Aid Self-Service.

1. Access the Institutional Financial Aid Options Form (ROAINST).
2. Enter an aid year in the **Aid Year** field.
3. Perform a **Next Block** function.
4. Click on the **Web Processing Rules** tab.
5. Click the **Allow Partial Amount Acceptance** indicator to allow students to accept an award for a lesser amount.
6. Click the **Allow Accept Full Amount of All Awards Option** indicator to allow students to click one button to accept all awards for their full amount instead of having to accept each award individually.

7. Click the **Display Award Offer Tab** indicator to allow the specific table to display on Banner Financial Aid Self-Service that allows students to accept awards.
8. Click the **Save** icon.
9. Click the **Exit** icon.

Note: Students will only be allowed to accept funds currently in an offered status. Funds that are auto-accepted or already accepted cannot be updated by the student via Banner Financial Aid Self-Service. This process is not allowed on packages or funds that are locked. This process is not allowed on years that are coded as inactive.

Purpose

The Funds Management Form (RFRMGMT) allows you to control by fund which funds can be accepted via Banner Financial Aid Self-Service.

Banner form

The screenshot shows the Banner Funds Management Form (RFRMGMT) for Fund Code DIRECT. The form is titled "Fund Management RFRMGMT 7.12 (C700)". It has a tabbed interface with the following tabs: Fund, Packaging, Disbursement, Disbursement Locks, Fund Comments, Budget, Detail Code Rules, Tracking, Messages, and Copy. The "Packaging" tab is active.

At the top, there are dropdown menus for "Aid Year" (0708) and "Fund Code" (DIRECT), with the text "Federal Direct Stafford Loan" below them.

The form is divided into two columns of fields:

- Left Column:**
 - Award Maximum: 10,500.00
 - Award Minimum: .00
 - Offer Status: OFRD (Offered)
 - Accept Status: ACPT (Accepted)
 - Decline Status: DECL (Declined)
 - Web Accept Status: ACPT (Accepted)
 - Web Decline Status: DECL (Declined)
 - Automatic Packaging
 - Automatic Scheduling
 - Automatic Acceptance
 - Award Using Estimated EFC
 - Override Need
 - Override Need to Cost of Attendance
 - Override Satisfactory Academic Progress
 - Override Requirement
 - Replace EFC
 - Reduce Need
 - Loan Process
 - Need Analysis
 - Award Letter
- Right Column:**
 - Rebate Fee Percentage: 1.5
 - Loan Fee Percentage: 2
 - Interest Rate: (empty)
 - Direct Loan Indicator: S=Subsidized
 - Electronic Loan Indicator: (None)
 - Manual Loan Indicator: (None)
 - Self Help Reduction Percentage: (empty)
 - LMS Loan Fund: (empty)
 - Alternative Loan Program Type: (empty)
 - ACG Grade Level: (None)
 - SMART Grade Level: (None)
 - TEACH Level: (None)
 - Round Award: 001
 - Round Schedule: RC=Round Cents
 - Memo Credit: A=Accepted
 - Disburse: N=No disbursement
 - Web Accept Flag
 - Equity Fund
 - Allow Web Lender Selection
 - Eligible to Roll
 - Display PN Requirement on Web
 - Count for NCAA

Steps

Follow the steps to enable funds to display on Banner Financial Aid Self-Service.

1. Access the Fund Management Form (RFRMGMT).
2. Enter an aid year in the **Aid Year** and a fund code in the **Fund Code** fields.
3. Perform a **Next Block** function

4. Click on the **Packaging** tab.
5. Check the **Web Accept Flag** indicator if you want the student to be allowed to accept this fund code on Banner Financial Aid Self-Service.
6. Click the **Save** icon.
7. Repeat these steps for any additional funds.

Note: This process does not apply to Pell Grants as the award status of a Pell Grant cannot be updated.

Satisfy Award Letter Tracking Requirements

Purpose

The Web Accept Tracking Rules on the Institutional Financial aid Options Form (ROAINST) allows you to specify your tracking document that means Terms and Conditions so this document can be satisfied when the student accepts their Terms and Conditions on Banner Financial Aid Self-Service.

Banner form

The screenshot shows the 'Web Processing Rules' tab in the ROAINST form. At the top, the 'Aid Year' is set to 0708. Below the tabs, the 'Information Access Indicator' is checked. The 'Web Processing Rules' section contains several checkboxes, all of which are checked, including 'Display COA Detail', 'Display Need Calculation', 'Display Cumulative Loan Amounts', 'Display Outside Resource Detail', 'Display Award Messages with Terms and Conditions', 'Allow Partial Amount Acceptance', 'Allow Accept Full Amount of All Awards Option', 'Allow Student to Submit Outside Resource Information', 'Allow Student to Submit Award Information', 'Display Housing Status', 'Display Terms with Zero Award Amount', 'Display Funds with Zero Award Amount', 'Display Resources/Additional Information Tab', 'Display Terms and Conditions Tab', 'Print Terms and Conditions', 'Display Accept Award Offer Tab', and 'Display Special Messages Tab'. There are also dropdown menus for 'Value for Null Info Access Indicator' (set to 'Y=Use Y for Null Value') and 'Display Enrollment Status' (set to 'T=Term Enrollment'). Text input fields are present for 'Default Lender URL Description' (sallie mae) and 'Default Lender URL' (www.salliemae.com).

Web Accept Tracking Rules Requirement Code	Description	Status	Description	Type Code
T&C	Terms and Conditions	S	Received and Satisfied	A = Award Acceptance
WEBAL	Web Award Ltr	S	Received and Satisfied	A = Award Acceptance

Steps

Follow the steps to allow an Award Letter tracking requirement to be automatically satisfied in Banner when the student accepts their final award via Banner Financial Aid Self-Service.

1. Access the Institutional Financial Aid Options Form (ROAINST).
2. Enter an aid year in the **Aid Year** field.
3. Perform a **Next Block** function.
4. Click on the **Web Processing Rules** tab.

5. Enter the your tracking requirement for Award Letter in the **Requirement Code** field or choose the dropdown and select the appropriate requirement code.
6. Enter the satisfied tracking status in the **Status** field that you would like Banner to use when updating the tracking requirement or choose the dropdown and select the appropriate status.
7. Choose **Type Code** of web acceptance being tracked by this tracking requirement.
8. Perform a **Next Block** function
9. Click the **Save** icon.
10. Click the **Exit** icon.

Note: The Award Letter tracking requirement you are using must already exist on RRAAREQ for a student in order to use this functionality. System indicator for tracking document satisfied in this manner will be a W for Web. The requirement is only satisfied if 'no' funds remain in an offered status, not just web enables funds. Multiple requirement codes are possible.

Satisfy Terms and Conditions Tracking Requirements

Banner form

The screenshot shows the Banner Financial Aid Options Form (ROAINST) for the year 0708. The 'Web Processing Rules' tab is selected, displaying various options for displaying terms and conditions, loan amounts, and housing status. Below this, the 'Web Accept Tracking Rules' section contains a table with columns for Requirement Code, Description, Status, and Type Code.

Requirement Code	Description	Status	Description	Type Code
T&C	Terms and Conditions	S	Received and Satisfied	A = Award Acceptance
WEBAL	Web Award Ltr	S	Received and Satisfied	A = Award Acceptance


Steps

Follow the steps to require a student to accept the terms and conditions via Banner Financial Aid Self-Service prior to accepting awards. In addition, the appropriate tracking requirement will automatically be satisfied in Banner when the student accepts their terms and conditions via Banner Financial Aid Self-Service.

1. Access the Institutional Financial Aid Options Form (ROAINST).
2. Enter an aid year in the **Aid Year** field.
3. Perform a **Next Block** function.
4. Click on the **Web Processing Rules** tab.

5. Enter the your tracking requirement for terms and conditions in the **Requirement Code** field or choose the dropdown and select the appropriate requirement code.
6. Enter the satisfied tracking status in the **Status** field that you would like Banner to use when updating the tracking requirement or choose the dropdown and select the appropriate status.
7. Choose **Type Code** of web acceptance being tracked by this tracking requirement.
8. Perform a **Next Block** function.
9. Click the **Save** icon.

Note: The Terms and Conditions tracking requirement you are using must already exist on the Applicant Requirements Form (RRAAREQ) for a student in order to use this functionality. System indicator for tracking document satisfied in this manner will be a 'W' for Web. Be sure to not enable the Terms and Conditions information on the Institution Financial Aid Options Form (ROAINST) until you have setup the appropriate information. If you enable the Terms and Conditions functionality in Banner Financial Aid Self-Service prior to a student being assigned this tracking document, the student will see the following message:

 You have accepted the Terms and Conditions.


Institution specific terms and conditions are built with the web text functionality explained later in this workbook. If the student has not accepted the terms and conditions, they will see the following options and will not be able to access the **Accept Award Offer** tab.

General Information	Award Overview	Resources/Additional Information	Term and Conditions	Accept Award Offer	Special Messages
---------------------	----------------	----------------------------------	----------------------------	--------------------	------------------

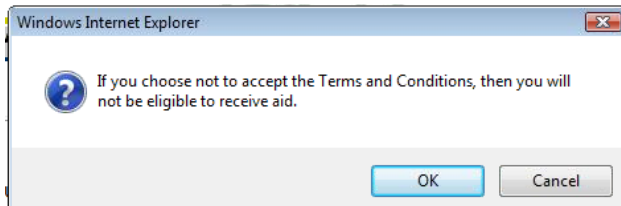
Terms and Conditions

Financial Aid is awarded based on you maintaining satisfactory academic progress as outlined in the university catalog. You must be enrolled at least half-time to be eligible for most financial aid funding. If you register for classes but do not attend beyond the second week, you must officially drop the course and you may be responsible for charges incurred. Please be aware that the financial aid office reserves the right to adjust your awards due to changes in enrollment, satisfactory academic progress, availability of funds, or additional information received. You must accept these terms and conditions to be eligible for Financial Aid at XYZ University.

Once the student accepts these terms and conditions, the following message will display each time this page is accessed.

 You have accepted the Terms and Conditions.

If the student chooses the Do Not Accept button, the following message will appear:



Clicking the OK button will bring them back to the General Information tab. Clicking the Cancel button will allow them to choose to accept.

Choose Lender Online

Purpose

The Banner Electronic Loan module contains logic to store a student's lender on the Student Lender History Form (RPASLND). In addition, lenders can be coded as active or inactive on the Lender Base Data Form (RPRLNDR). Information on these two forms can be found in the Electronic Loans workbook.

The Funds Management Form (RFRMGMT) allows you to indicate for your loan funds if a lender can be chosen online for this fund.

Note: Students will only be given the Choose Lender Option if they currently do not have an active lender in history (on RPASLND). Only lenders coded as active on RPRLNDR will be in the list of lenders displayed when the student is selecting a lender.

Banner form

The screenshot shows the Banner Funds Management Form (RFRMGMT) for fund code STFD (Federal Stafford Loan). The form is divided into several sections with various input fields and checkboxes.

Form Fields:

- Aid Year:** 0708
- Fund Code:** STFD (Federal Stafford Loan)
- Award Maximum:** 8,500.00
- Award Minimum:** 200.00
- Offer Status:** Offered
- Accept Status:** Accepted
- Decline Status:** Declined
- Web Accept Status:** Accepted
- Web Decline Status:** Declined
- Automatic Packaging:**
- Automatic Scheduling:**
- Automatic Acceptance:**
- Award Using Estimated EFC:**
- Override Need:**
- Override Need to Cost of Attendance:**
- Override Satisfactory Academic Progress:**
- Override Requirement:**
- Replace EFC:**
- Reduce Need:**
- Loan Process:**
- Need Analysis:**
- Award Letter:**
- Rebate Fee Percentage:**
- Loan Fee Percentage:** 3
- Interest Rate:**
- Direct Loan Indicator:** (None)
- Electronic Loan Indicator:** S=Subsidized
- Manual Loan Indicator:** (None)
- Self Help Reduction Percentage:**
- LMS Loan Fund:**
- Alternative Loan Program Type:**
- ACG Grade Level:** (None)
- SMART Grade Level:** (None)
- TEACH Level:** (None)
- Round Award:** 001
- Round Schedule:** RD=Round Dollars
- Memo Credit:** A=Accepted
- Disburse:** N=No disbursement
- Web Accept Flag:**
- Allow Web Lender Selection:**
- Display PN Requirement on Web:**
- Equity Fund:**
- Eligible to Roll:**
- Count for NCAA:**

Steps

Follow the steps to enable a student to choose an active lender online.

1. Access the Fund Management Form (RRFMGMT).
2. Enter an aid year in the **Aid Year** and a fund code in the **Fund Code** fields.
3. Perform a **Next Block** function
4. Click on the **Packaging** tab.
5. Check the **Allow Web Lender Selection** box if you want the student to be allowed to choose a lender for this fund code on Banner Financial Aid Self-Service.
6. Click the **Save** icon.
7. Repeat these steps for any additional funds.

Print and Display Award Letter

Students will have the ability to print an award letter from the **Award Overview** tab or the **Accept Award Offer** tab.



The award letter will print and will look very similar to the **Award Overview** tab on Banner Financial Aid Self-Service. The terms and conditions will also print at the end of the award letter if the **Print Terms and Conditions** checkbox was selected on the **Web Processing** tab of the Institution Financial Aid Options Form (ROAINST).

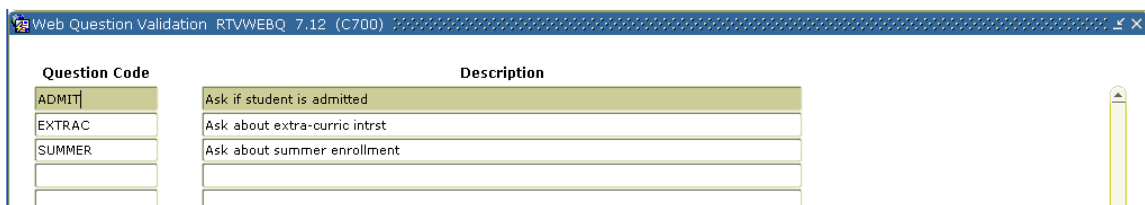
You can add your logo to the printed award letter via Web Tailor.

Web Questions and Answers

Purpose

The Web Questions Validation Form (RTVWEBQ) contains the validation codes for any question you choose to ask the student on Banner Financial Aid Self-Service. These codes are defined and maintained by the institution.

Banner form



The screenshot shows a web browser window titled "Web Question Validation RTVWEBQ 7.12 (C700)". The window displays a table with two columns: "Question Code" and "Description". The table contains the following data:

Question Code	Description
ADMIT	Ask if student is admitted
EXTRAC	Ask about extra-curric intrst
SUMMER	Ask about summer enrollment

Steps

Follow these steps to create Web Question Codes.

1. Access the Web Question Validation Form (RTVWEBQ).
2. Enter a question code in the **Question Code** field.
3. Enter a description in the **Description** field.
4. Click the **Save** icon.
5. Repeat these steps for any additional question codes.

Purpose

The Web Question and Answer Rules Form (RORWBQA) allows you to define the question text and characteristics and what rules to follow according to a student's answer.

Banner form

Web Question and Answer Rules RORWBQA 7.12 (C700)

Aid Year: 0708 2007-2008 Financial Aid Year

Question Rules Answer Rules

Question Code: ADMIT Answer Type: L=Defined List Active Indicator
Display Sequence Number: 1 Question Occurrence: O=Once for Aid Year Required Indicator
Question Text: Have you been admitted to SunGard HE University?

Question Code: EXTRAC Answer Type: T=Free Form Text Active Indicator
Display Sequence Number: 2 Question Occurrence: O=Once for Aid Year Required Indicator
Question Text: In what types of extra-curricular activities might you be interested in participating?

Question Rules Answer Rules

Question Code	Stop Processing	Answer Value	Message Code
ADMIT	N=Does Not Stop Processing	Yes	
ADMIT	S=This Specific Defined Answer	No	ADMT

Steps

Follow the steps to define set rules for questions on Banner Financial Aid Self-Service.

1. Access the Web Questions and Answer Rules Form (RORWBQA).
2. Enter an aid year in the **Aid Year** field.
3. Perform a **Next Block** function
4. Enter a **Question Code** or click on the drop down to select a Question Code from the Web Question Validation Form (RTVWEBQ).

5. Choose **Answer Type** for this question:
 - L = Defined List (You will define values on next tab)
 - N = Numeric
 - T = Free Form Text
6. Enter a **Sequence Number**. This number determines the order in which the questions will display in Banner Financial Aid Self-Service.
7. Enter the **Question Occurrence**:
 - E = Every Time Awards are Accessed
 - O = Once for Aid Year
 - U = When Unaccepted Awards Exist
8. Enter **Question Text**.
9. Click the **Save** icon.
10. Click on **Answer Rules** tab.
11. Question Code will default in from first tab. Indicate if you want to Stop Processing for any specific answer values.

You can choose to stop processing under the following conditions:

 - A = Any not null answer will stop processing
 - N = This specific answer does not stop processing (define in Answer Value column)
 - S = This specific answer does stop processing (define in Answer Value column)
 - Z = Any Answer > Zero will stop processing

(None)

Note: Your valid choices here will depend on your Answer Type chosen for Question.

- For any value that stops processing, you also can attach a message code. This message code must first be built on RTVMESG and have the **Stop Electronic Award Process** indicator checked.

Note: When a student answers the question with a value that stops processing the following happens:

The student is brought back to the **General Information** tab in Banner Financial Aid Self-Service with the assigned message showing. If there is no assigned message or the message is expired, the student will see a generic message indicating 'No Award Information Available'.

The **Information Access** indicator on the Award Maintenance Form (RPAAWRD) is unchecked so the student will not be allowed to access award information.

The message is assigned on the Applicant Messages Form (ROAMESG).

- Repeat these steps for any additional question codes.

Banner forms

Message Code Validation RTVMESG 7.12 (C700)

Message Code:	ADMT	<input checked="" type="checkbox"/> Information Access
Activity Date:	13-NOV-2007	<input checked="" type="checkbox"/> Stop Electronic Award Process
Text:	In order to be eligible for federal student aid, you must first be admitted to a degree program. Contact the Admissions Office at 509.235.4692 for an application.	

Message Code:	ADV	<input checked="" type="checkbox"/> Information Access
Activity Date:	24-DEC-2005	<input type="checkbox"/> Stop Electronic Award Process
Text:	Congratulations on your UDC Endowed Scholarship Award. Please note that a Thank you Letter to the donor is required before your scholarship can be awarded. The donor of this scholarship was Matthew Allen. You can search for his record and email him directly from Self Service. Please complete your thank you letter and contact the Advancement Office at http://www.sungardscot.com . Again, congratulations on your award.	

Applicant Messages ROAMESG 7.6.1 (C700)

Aid Year: 0708 ID: 900037854 Test PIN Web

Message Code:	ADMT	In order to be eligible for federal student aid, you must first be admitted to a degree program. Contact the Admissions Office	
Expiration Date:	11-NOV-2008	Activity Date:	27-OCT-2008
Message:	User ID: FAISUSR		

Processing Web Applicant Reported information

Purpose

The Web Applicant Reported Information Form (RPAINFO) allows you to review outside resource information, award information and question responses submitted by applicants.

Banner form

The screenshot displays the 'Web Applicant Reported Information RPAINFO 7.12 (C700)' window. At the top, there are filters for 'Aid Year: 0708', 'ID:', 'Type: All', and 'Records Displayed: N=Not Reviewed'. The main area shows two records, each with a set of fields and a 'Question Text' field.

Record	ID	Resource	Term	Estimated Amount	Actual Amount	Question Code	Question Text	Message Code	Comments/Answer	Create Date	Type	Review Status	Update Applicant Resource Table	Applicant Resource Table Updated
1		Lions Club Scholarship	200810	2,000.00							R=Outside Resource Information	N=Not Reviewed	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2						EXTRAC	In what types of extra-curricular activities might you be interested in participating?		Girls Basketball Debate Club		Q=Question Response	N=Not Reviewed	<input type="checkbox"/>	<input type="checkbox"/>

Steps

Follow the steps to review a student's reported information from Banner Financial Aid Self-Service.

1. Access the Applicant Reported Information Form (RPAINFO).
2. Enter an aid year in the **Aid Year** and a student ID in the **Student ID** fields. You can also narrow your query down by **Type** and **Records Displayed**.

Type:

All

A = Award Information

Q = Question Response

R = Outside Resource

Records Displayed:

All

N = Not Reviewed

P = Pending

R = Reviewed

3. Perform a **Next Block** function
4. Review each response and once complete, update review status to *Reviewed*. You can also use the *Pending* status if further action is needed and you want to mark this response in progress.

Note: When you indicated *Reviewed* to a question that was set to Stop Processing:

5. The student can then view award information in Banner Financial Aid Self-Service.

The **Information Access** indicator on the Award Maintenance Form (RPAAWRD) will be rechecked so student can access award information.

The message originally assigned on the Applicant Messages Form (ROAMESG) due to stop processing will be expired.

If a student entered information indicating he/she is receiving an Outside Resource, the resource name, term code, and dollar amount will display on RPAINFO. You have the option to take this information and manually enter it into the Resource Maintenance Form (RPAARSC) or you can click on the **Update Applicant Resource Table** checkbox and Banner will update the Resource Maintenance Form (RPAARSC).

Note: You will still want to review the student's award and verify there is no over award.

6. Click the **Save** icon.
7. Repeat these steps for any additional responses.

Purpose

The Web Applicant Info Process (RPPINFO) can be utilized to identify students who need to have information reviewed. This process reports the appropriate information from the Web Applicant Reported Information Form (RPAINFO) according to the parameters you choose.

Banner form

The screenshot shows a web application window titled "Process Submission Controls GJAPCTL 7.4.1.1 (C700)". The interface includes the following sections:

- Process:** A dropdown menu set to "RPPINFO" and a text field containing "Web Applicant Info Process".
- Parameter Set:** A dropdown menu.
- Printer Control:** A section with a "Printer:" dropdown, a "Special Print:" text field, "Lines: 55", and a "Submit Time:" text field.
- Parameter Values:** A table with two columns: "Parameters" and "Values".

Number	Parameters	Values
01	Aid Year Code	0708
02	Record Type	L
03	Review Status	L
04	Resource Records to Select	A
05	Beginning Date	
06	Ending Date	
07	Sort Order	N
08	Application ID	

LENGTH: 1 TYPE: Character O/R: Required M/S: Single
Sort report by [N]ame, (I)d, (R)evision status/Name, or (S)Revision status/ID.

Submission

Save Parameter Set as Name: Description: Hold Submit

Steps

Follow the steps to report Web Applicant Response Information.

1. Access the Web Applicant Info Process (RPPINFO).
2. Perform a **Next Block** function
3. Select a printer or enter *DATABASE* in the **Printer** field.
4. Perform a **Next Block** function

5. Use this table to enter the appropriate data for the various parameters.

Number	Parameters	Action
01	Aid Year Code	Enter Valid/Active Aid Year Code
02	Record Type	Report out by Record Type: [L] all records, (R)esources, (A)wards, (Q)uestions
03	Review Status	Report out by Review Status: [L] all records, (R)eviwed, (N)on-reviewed, (P)ending
04	Resource Records to Select	Report out Resource Records: (A)ll, (N)on-updated, (U)dated, Blank for none
05	Beginning Date	Enter a beginning create date for records to select
06	Ending Date	Enter an ending create date for records to select
07	Sort Order	Sort report by [N]ame, (I)d, (R)eviw status/Name, or (S)Review Status/ID
08	Application ID	Enter an Application ID if using a population selection
09	Selection ID	Enter a Selection ID if using a population selection
10	Creator ID	Enter a Creator ID if using a population selection
11	User ID	Enter a User ID if using a population selection

6. Move your cursor to the Submission block and click the **Submit** radio button.

7. Click the **Save** icon.

Result: This will execute the job and will generate a report.

Purpose

The Web Applicant Info Purge Process (RPPINF) can be utilized to purge data from the Web Applicant Reported Information Form (RPAINFO) according to the parameters you choose.

Banner form

The screenshot shows a Banner form window titled "Process Submission Controls - GJAPCTL 7.4.1.1 (C700)". The form is divided into several sections:

- Process:** RPPINF (dropdown), Web Applicant Info Purge (text field)
- Parameter Set:** (dropdown)
- Printer Control:**
 - Printer:** (dropdown)
 - Special Print:** (text field)
 - Lines:** 55 (text field)
 - Submit Time:** (text field)
- Parameter Values:**

Number	Parameters	Values
01	Aid Year Code	
02	Record Type	L
03	Review Status	R
04	Resource Records to Purge	
05	Beginning Date	
06	Ending Date	
07	Print Purged Records	Y
08	Sort Order	N

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

Steps

Follow the steps to purge the Web Applicant Response Information Form (RPAINFO).

1. Access the Web Applicant Info Purge Process (RPPINF).
2. Perform a **Next Block** function
3. Select a printer or enter *DATABASE* in the **Printer** field.
4. Perform a **Next Block** function

- Use this table to enter the appropriate data for the various parameters.

Number	Parameters	Action
01	Aid Year Code	Enter Valid/Active Aid Year Code
02	Record Type	Purge by Record Type: [L] all records, (R)esources, (A)wards, (Q)uestions
03	Review Status	Purge by Review Status: [L] all records, (R)evolved, (N)on-reviewed, (P)ending
04	Resource Records to Purge	Purge Resource Records: (A)ll, (N)on-updated, (U)dated, Blank for none
05	Beginning Date	Enter a beginning create date for records to purge
06	Ending Date	Enter an ending create date for records to purge
07	Report Purged Records	Print purged records. [Y]es or (N)o
08	Sort Order	Sort report by [N]ame, (I)d, (R)evolve status/Name, or (S)Review Status/ID
09	Application ID	Enter an Application ID if using a population selection
10	Selection ID	Enter a Selection ID if using a population selection
11	Creator ID	Enter a Creator ID if using a population selection
12	User ID	Enter a User ID if using a population selection

- Click the **Submit** radio button.

- Click the **Save** icon.

Result: This will execute the job and will generate a report.

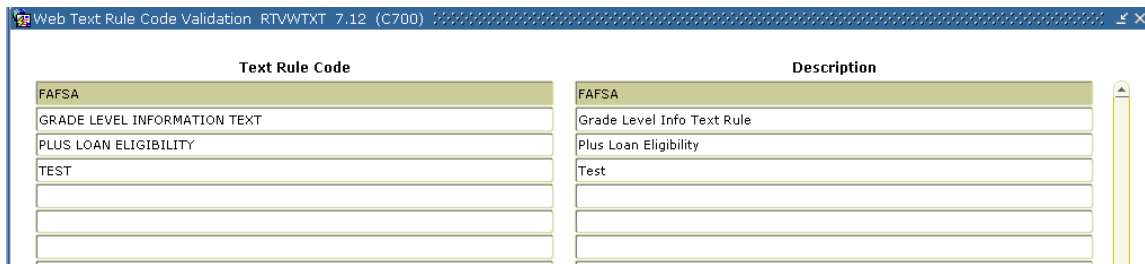
Note: If you purge responses to a Once per Year question within the aid year, it will require the student respond to the question again in that same aid year.

Web Text

Purpose

Student-specific web text can be used to display different text to a group of students and to display your terms and conditions information.

Banner form



The screenshot shows a web browser window titled "Web Text Rule Code Validation RTVWTEXT 7.12 (C700)". The main content is a table with two columns: "Text Rule Code" and "Description". The table contains the following data:

Text Rule Code	Description
FAFSA	FAFSA
GRADE LEVEL INFORMATION TEXT	Grade Level Info Text Rule
PLUS LOAN ELIGIBILITY	Plus Loan Eligibility
TEST	Test

Steps

Follow the steps to create Web Text Rule Codes.

1. Access the Web Text Rules Validation Form (RTVWTEXT).
2. Enter a text rule code in the **Text Rule Code** field and a description in the **Description** field.

For example, create a Text Rule Code to allow specific text to show for all students who have completed a FAFSA for a specific aid year.

3. Click the **Save** icon.
4. Repeat these steps for any additional codes.

Purpose

The **SQL Rules** tab on Web Text Rules Form (RORWTEXT) allows you to define the rules to follow when displaying web text.

Banner form

The screenshot shows the 'Web Text Rules RORWTEXT 7.12 (C700)' window. At the top, there are dropdown menus for 'Aid Year' (set to 0708) and 'Rule' (set to FAFSA). Below these are two tabs: 'SQL Rules' (selected) and 'Select Value Rules'. The main area contains several checkboxes: 'Validated' (checked), 'Active' (checked), 'Validate' (checked), and 'Test Rule' (unchecked). To the right, there are input fields for 'User ID' (FAISUSR) and 'Activity Date' (27-OCT-2008). A large text area labeled 'SQL Statement:' contains the following SQL code:

```
SELECT '1' FROM RCRAPP1
WHERE RCRAPP1_INFC_CODE = 'EDE' AND
RCRAPP1_AIDY_CODE = :AIDY
```

At the bottom, there are three dropdown menus labeled 'Table:', 'Column:', and 'Parameter:'.

Steps

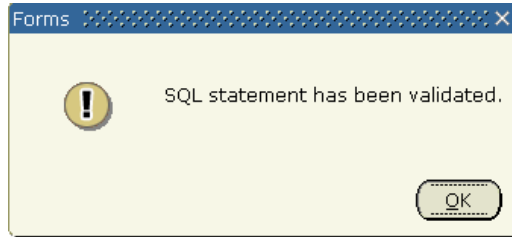
Follow the steps to create the rule for the Web Text Code you just built.

1. Access the Web Text Rules Form (RORWTEXT).
2. Enter an aid year in the **Aid Year** field and a web text code in the **Rules** field.
3. Perform a **Next Block** function
4. Enter the SQL statement in the **SQL Statement** field that should be used to select your group of students who should have specific text displayed.

Example: `SELECT '1' FROM RCRAPP1
WHERE RCRAPP1_INFC_CODE = 'EDE' AND
RCRAPP1_AIDY_CODE = :AIDY`

Will bring back a value of '1' for all students who have an EDE record for the specified aid year.

- Click the **Save** icon.
- Click on the **Validate** icon to allow Banner to validate the SQL logic. If the SQL logic is correct and validates, you will receive this message:



In addition, the **Validated** indicator will be checked on the Banner form. You cannot use this rule until it is validated.

If the SQL logic is incorrect, you will receive a Banner Error and Warning Messages box indicating the SQL error. In this case, fix the error, save, and validate again.

- To test a student, enter in the student ID in the **ID** field and click **Execute**. The Calculated Select Value field will display. You can also test a student for a different aid year (other than the one in the key block) by completing the **ID** and **Alternate Aid Year** fields and clicking **Execute**.



Note: To define the text you want displayed for returned values, refer to the next screen shot and procedures.

Purpose

The **Select Value Rules** tab on Web Text Rules Form (RORWTEXT) allows you to define the heading, the specific text you wish to display according to the value returned by the SQL Rules, and the **Self Service** tab to display the text.

Banner form

The screenshot shows a web browser window titled "Web Text Rules RORWTEXT 7.12 (C700)". At the top, there are two dropdown menus: "Aid Year" set to "0708" (2007-2008 Financial Aid Year) and "Rule" set to "FAFSA". Below these are two tabs: "SQL Rules" and "Select Value Rules", with the latter being selected. Under the "Select Value Rules" tab, there is a "Self-Service Tab" dropdown menu set to "GI=General Information". Below this, there are two rows of configuration fields. The first row is highlighted in green and includes: "Select Value:" with a text box containing "1" and a checked "Active" checkbox; "Heading:" with a text box containing "Financial Aid Application"; and "Text:" with a text box containing "Thank you for completing your Free Application for Financial Aid. The information shown in the subsequent tabs is based off the information Roosevelt received on your FAFSA." The second row is currently empty and includes: "Select Value:" with an empty text box and an unchecked "Active" checkbox; "Heading:" with an empty text box; and "Text:" with an empty text box. On the right side of the form, there are vertical scroll bars for the heading and text fields.

Steps

Follow the steps to define the text you wish to display according to your rule on the **SQL Rules** tab.

1. Click on the **Select Values Rules** tab of the Web Text Rules Form (RORWTEXT).
2. Choose the Banner Financial Aid Self-Service tab you wish to display the appropriate text.

Note: You can use the same rule and choose different text for different tabs on Banner Financial Aid Self-Service.

3. Enter a value in the **Select Value** field.

Example: the SQL from this rule will bring back a '1' for any student who has an EDE record. Your select value would be a 1.

4. Enter a heading in the **Heading** field for this text. The heading will display in bold above the text on Banner Financial Aid Self-Service. You can leave the **Heading** field blank if you do not wish to have a heading for this text.

5. Enter the text in the **Text** field you wish to display for all students with this value.
6. Click the **Save** icon.
7. Repeat these steps for any additional values this SQL may return.

Purpose

The Select Web Tab Rules Form (RORWTAB) is necessary for you to define which text you wish to show on each tab and in a particular sequence.

Banner form

Text Rule Code	Description	Display Sequence Number
FAFSA	FAFSA	2
GRADE LEVEL INFORMATION TEXT	Grade Level Info Text Rule	5

Steps

Follow the steps allow the text to display on a specific Banner Financial Aid Self-Service tab and in a particular order.

1. Access the Web Tab Rules Form (RORWTAB).
2. Enter an aid year in the **Aid Year** field and a web text code in the **Rules** field.
3. Perform a **Next Block** function
4. Enter in the text rule codes in the **Text Rule Code** fields for which you want to display on that specific tab and put in a specific sequence number. You can also choose the dropdown in the **Text Rule Code** field to choose the appropriate code.

Note: leave room in between the sequence numbers to allow for inserting additional codes at a later time.

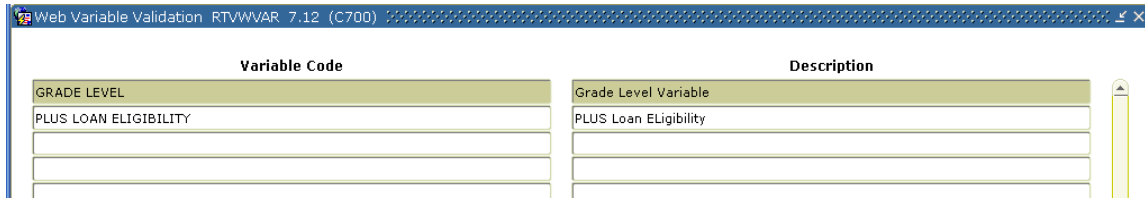
5. Click the **Save** icon.
6. Repeat these steps for any additional tabs and/or rules.

Note: Information on this form displays alphabetically by Text Rule Code, not by sequence number.

Purpose

The Web Variable Validation Form (RTVWVAR) allows you to define variables you wish to use in your web text. These variables can calculate or pull specific student information to insert into text.

Banner form



The screenshot shows a web browser window titled "Web Variable Validation RTVWVAR 7.12 (C700)". The main content is a table with two columns: "Variable Code" and "Description". The table has a header row with a light green background. Below the header, there are three rows of data. The first row contains "GRADE LEVEL" in the Variable Code column and "Grade Level Variable" in the Description column. The second row contains "PLUS LOAN ELIGIBILITY" in the Variable Code column and "PLUS Loan Eligibility" in the Description column. The third row is empty. There are also two empty rows below the third row. A vertical scrollbar is visible on the right side of the table.

Variable Code	Description
GRADE LEVEL	Grade Level Variable
PLUS LOAN ELIGIBILITY	PLUS Loan Eligibility

Steps

Follow the steps to create Web Variable Codes.

1. Access the Web Variable Validation Form (RTVWVAR).
2. Enter a web variable code in the **Variable Code** field and a description in the **Description** field.

Example: create a Variable Code called PLUS_LOAN_ELIGIBILITY and enter a description.

3. Click the **Save** icon.
4. Repeat these steps for any additional variable codes.

Purpose

The Web Variable Rules Form (RORWVAR) allows you to create SQL rules to select or calculate the variable information.

Banner form

Web Variables RORWVAR 7.12 (C700)

Variable: PLUS LOAN ELIGIBILITY PLUS Loan Eligibility

Validated Validate Test Rule

User ID: FAISUSR
Activity Date: 27-OCT-2008

SQL Statement: SELECT (RNVAND0_BUDGET_AMOUNT - RNVAND0_OFFER_AMT) FROM RNVAND0
WHERE RNVAND0_AIDY_CODE = :AIDY

Available for Lookup

Table: Column: Parameter:

Steps

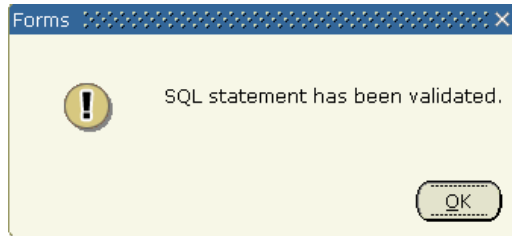
Follow the steps to create the rule for the Web Variable Code you just built.

1. Access the Web Variables Rules Form (RORWVAR).
2. Enter an aid year in the **Aid Year** and a web variable code in the **Variable** fields.
3. Perform a **Next Block** function
4. Enter the SQL statement in the **SQL Statement** field that should be used to calculate your variable to insert in the web text.

Example: SELECT RNVAND0_UNMET_NEED FROM RNVAND0
WHERE RNVAND0_AIDY_CODE = :AIDY AND
RNVAND0_PIDM = :PIDM

This statement will bring back a calculated value for each student selected in your web text criteria.

- Click the **Save** icon.
- Click on the **Validate** icon to allow Banner to validate the SQL logic. If the SQL logic is correct and validates, you will receive a box indicating:



In addition, the **Validate** indicator will be checked on the Banner form. You cannot use this rule until it is validated.

If the SQL logic is incorrect, you will receive a Banner Error and Warning Messages box indicating the SQL error. In this case, fix the error, save, and validate.

- To test a student, enter in the student ID in the **ID** field and aid year in the **Aid Year** field and click **Execute**. The Calculated Value will display.

- To add this variable to your web text, enter it on the Web Text Rules Form (RORWTXT) for your PLUS_LOAN_ELIGIBILITY text. The format in using a variable is shown in this example:

Your parents may be eligible to borrow up to \$< **PLUS_LOAN_ELIGIBILITY** > in the Federal PLUS Loan.

- Click the **Exit** icon.

Advanced Web Tailor

Purpose

Banner Self-Service contains a web menu/procedure for each of the Banner modules. If a person has the role of web tailor for any of the Banner modules, there will be a corresponding link to the Web Tailor on their login page.

The role of Web Tailor consists of designing the look and feel of the web pages, information text and additional HTML links to other informative web pages if desired. The key to Web Tailor is to find the menus and know where the text and design will show on the user's page. Upon the installation of the Self-Service products, the data within the Web Tailor pages are loaded into Oracle tables. This is a similar concept to "Seed" data upon Banner installations. A Web Tailor page is a door to the Self-Service pages, which hold the images, descriptions, links, etc. of the web pages within the self-service environment. Changing the verbiage, adding links or otherwise customizing the Web Tailor pages, the Oracle tables that store the data will also be updated with these changes. The Web Tailor menu consists of a baseline copy of all the web pages/packages. Once a page is modified, a local copy is created. This allows for future upgrades to take place without overriding any customization a site has performed. Only one local copy is allowed per baseline copy, but it may be changed as many times as desired. Deleting a web page will completely remove the page from corresponding Oracle tables. If a page is no longer desired, simply disable it instead of deleting it; this will allow for future use of the page with minimal reinstatement labor.

Self Check

Directions

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

Question 1

The final step for defining Questions and Answers for Banner Financial Aid Self-Service is:

- a) Build Web Variables on the Web Variables Form (RORWVAR).
- b) Define Question and Answer Rules on Web Question and Answer Rules Form (RORWBQA).
- c) Indicate tab and sequence on Web Tab Rules Form (RORWTAB).
- d) Define Questions Code on the Web Question Validation Form (RTVWEBQ).

Question 2

I can display Terms and Conditions and require students to accept these prior to accepting awards on-line.

True or False.

Question 3

Setting up a specific response to Stop Processing will stop

- a) the student from registering.
- b) the student from viewing/accepting awards.
- c) the student from viewing tracking requirements.
- d) the staff member from processing loans.

Answer Key for Self Check

Question 1

The final step for defining Questions and Answers for Banner Financial Aid Self-Service is:

- c) Indicate tab and sequence on Web Tab Rules Form (RORWTAB).**

Question 2

I can display Terms and Conditions and require students to accept these prior to accepting awards on-line.

True.

Question 3

Setting up a specific response to Stop Processing will stop

- b) the student from viewing/accepting awards.**

Appendix



Forms Job Aid

Form	Full Name	Use this Form to...
GOATPAC	Third Party Access	disable or reset a student's PIN number and view when they last access Self-Service.
GOATPAD	Third Party Access Audit	display the history of a student's user ID and PIN number to access Self-Service.
RBAABUD	Applicant Budget	display a student's breakdown for the cost of attendance and allows you to disable a student's entire budget from displaying on Banner Financial Aid Self-Service.
RFRBASE	Fund Base Data	define financial aid fund codes and descriptions and indicate which funds should display on Banner Financial Aid Self-Service.
RFRMGMT	Fund Management	control by fund which funds can be accepted via Banner Financial Aid Self-Service.
ROAINST	Institution Financial Aid Options	specify your tracking document that means Terms and Conditions so this document can be satisfied when the student accepts their Terms and Conditions on Banner Financial Aid Self-Service.
ROAMESG	Applicant Message	assign a message for a student that you can print on selected letters for a specific aid year.
ROASTAT	Applicant Status	display information about an applicant gathered from many different modules within the Financial Aid system.
RORWBOA	Web Question and Answer Rules	define the question text and characteristics and what rules to follow according to a student's answer.

Form	Full Name	Use this Form to...
RORWTAB	Web Tab Rules	define which text you wish to show on each tab and in a particular sequence.
RORWTXT	Web Text Rules	define the rules to follow when displaying web text.
RORWVAR	Web Variables Rules	create SQL rules to select or calculate the variable information.
RPAINFO	Applicant Reported Information	review outside resource information, award information and question responses submitted by applicants.
RPASLND	Student Lender History Data	store a student's lender information.
RPPINFO	Web Applicant Info Process	identify students who need to have information reviewed.
RPPPINF	Web Applicant Info Purge Process	purge data from the Web Applicant Reported Information Form (RPAINFO) according to the parameters you choose.
RPRCONT	Third Party Contract Rules	identify which contracts should display on Banner Financial Aid Self-Service.
RPREXPT	Exemptions Rules	identify which exemptions should display on Banner Financial Aid Self-Service.
RPRLNDR	Lender Base Data	maintain lender information and indicate if this lender should display on Banner Financial Aid Self-Service.
RPROPTS	Packaging Options	select options that control how certain functions in the Banner Financial Aid perform.
RRAAREQ	Applicant Requirements	assign a set of requirements to a financial aid applicant for a specified aid year.
RTVARSC	Resource Code Validation	define outside resources and identify which resources should display on Banner Financial Aid Self-Service.
RTVAWST	Award Status Validation	define fund award statuses and indicate which statuses should allow funds to display on Banner Financial Aid Self-Service.

Form	Full Name	Use this Form to...
RTVHOLD	Hold Type Validation	define financial aid hold codes and indicate if these holds should display on Banner Financial Aid Self-Service.
RTVMESG	Message Code Validation	build messages and indicate which messages should display on Banner Financial Aid Self-Service.
RTVPGRP	Packaging Group Validation	define packaging groups should allow display of award information on Banner Financial Aid Self-Service.
RTVSAPR	Satisfactory Academic Progress Validation	display the academic progress of a student, according to their SAP code. Disbursement and packaging for a student may be prevented from this form.
RTVTREQ	Requirements Tracking Validation	indicate globally which tracking items should display on Banner Financial Aid Self-Service.
RTVWEBQ	Web Question Validation	identify the validation codes for any question you choose to ask the student on Banner Financial Aid Self-Service.
RTVWTXT	Web Text Rules Validation	display different text to a group of students and to display your terms and conditions information.
RTVWVAR	Web Variable Validation	define variables you wish to use in your web text.