

**Banner Financial Aid**

Need Analysis

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**Introductions**

- Name
- Organization
- Title/function
- Job responsibilities
- Banner experience
- Expectations

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**Course Goals**

To master the Need Analysis module and its features such as

- Multiple Application Sources
- Online or Batch Calculations
- Multiple Methodologies
- EDE Corrections

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## Agenda

- Overview
- Set up
- Day-to-Day
- Question and Answer



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## Overview

- To outline the set-up and day-to-day processes and detail the procedures to set-up and run your Banner System



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## Set up Objectives

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

- identify and describe Banner forms and processes used for set-up
- create rules and set parameters used to process data.



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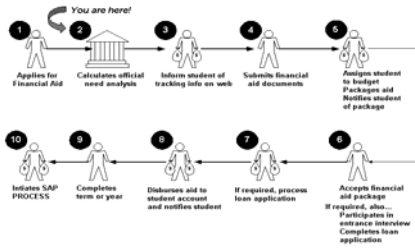
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## Set up Process



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## Set up Review

- What are the Banner forms and process used to set-up the Need Analysis process?
- What are some rules created to process data?
- What are the set parameters used to process data?



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## Day-to-Day Objectives

At the end of this course you will be able to

- enter a Need Analysis record online manually
- perform need analysis calculations using two different methods
- modify Need Analysis records using two different forms, and explain when to use each of these forms



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## Objectives, Continued

- calculate need analysis for non-financial aid applicants and explain why this would be done
- generate simulated need analysis
- perform overrides on students' financial aid records



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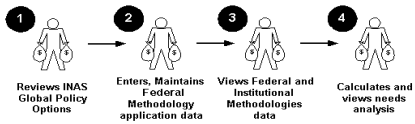
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## Day-to-Day Process



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## Day-to-Day Review

- How do you enter a Need Analysis record online manually?
- How do you perform overrides on students' financial aid records?
- What are the two methods used to perform need analysis calculations?



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## Course Summary/Review

As a result of this course we have,

- mastered the Need Analysis module
- mastered the features of the Need Analysis module
- learned how to use all the Banner forms and processes for both set-up and day-to-day use



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## Questions and Answers

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Thank you for your participation

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