

Banner Financial Aid

Requirements Tracking - Title IV Authorization

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Introductions

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

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Course Goals

The Requirements Tracking module permits you to define an unlimited number of documents or statuses that students need to submit or complete. These requirements control whether a student is eligible to be packaged or receive a payment of aid

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Agenda

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



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Overview

Master the Requirements Tracking module and its features such as

- Requirement Definition
- Grouping of Students
- Mass Entry
- Letter Generation



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Title IV Authorizations

- Title IV Authorizations functionality assists you in complying with the Title IV regulations for federal financial aid
- Under the cash management rules, an institution must receive authorization from a student in order to:
 - Use Title IV funds to pay non-institutional charges
 - Use Title IV funds to pay prior year balances
 - Hold credit balances resulting from Title IV funds



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Set up Objectives

At the end of this section you will be able to

- identify and describe Banner forms and process used for set-up
- create rules and set parameters used to process data
- establish tracking requirements for an applicant record

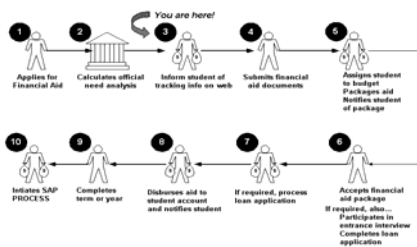


Objectives, Continued

- write and associate messages with a tracking requirement, for use in tracking letters or web pages
- set up default requirements for a tracking group.
- write rules to assign students with common application characteristics to a tracking group



Set up Process



- RTVTREQ- create tracking requirements
- RTVTRST- create tracking requirement statuses

Documents having validation: PVTN161 2.0 (3/26/2016)

Code: <input type="text"/>	<input checked="" type="checkbox"/> Active	Message Number: <input type="text"/>	<input type="checkbox"/> Packaging	<input type="checkbox"/> Safety All
Short Description: <input type="text"/>	<input type="checkbox"/> Not used		<input type="checkbox"/> Required Once	<input type="checkbox"/> Required Once
Long Description: <input type="text"/>			<input type="checkbox"/> Disbursement	<input type="checkbox"/> Update Prior Year
URL: <input type="text"/>	You must change with Title 32 Authorization		<input type="checkbox"/> Letter Exclusion	<input type="checkbox"/> Access Indicator
Activity Date: <input type="text"/>			<input type="checkbox"/> Perkins NPN	<input type="checkbox"/> Information Access
	29 OCT 2006			

Code: <input type="text"/>	<input type="checkbox"/> Active	Message Number: <input type="text"/>	<input type="checkbox"/> Packaging	<input type="checkbox"/> Safety All
Short Description: <input type="text"/>			<input type="checkbox"/> None	<input type="checkbox"/> Required Once
Long Description: <input type="text"/>			<input type="checkbox"/> Disbursement	<input type="checkbox"/> Update Prior Year
URL: <input type="text"/>			<input type="checkbox"/> Letter Exclusion	<input type="checkbox"/> Access Indicator
Activity Date: <input type="text"/>			<input type="checkbox"/> Perkins NPN	<input type="checkbox"/> Information Access

Code: <input type="text"/>	<input type="checkbox"/> Active	Message Number: <input type="text"/>	<input type="checkbox"/> Packaging	<input type="checkbox"/> Safety All
Short Description: <input type="text"/>			<input type="checkbox"/> None	<input type="checkbox"/> Required Once
Long Description: <input type="text"/>			<input type="checkbox"/> Disbursement	<input type="checkbox"/> Update Prior Year
URL: <input type="text"/>			<input type="checkbox"/> Letter Exclusion	<input type="checkbox"/> Access Indicator
Activity Date: <input type="text"/>			<input type="checkbox"/> Perkins NPN	<input type="checkbox"/> Information Access

Code: <input type="text"/>	<input type="checkbox"/> Active	Message Number: <input type="text"/>	<input type="checkbox"/> Packaging	<input type="checkbox"/> Safety All
Short Description: <input type="text"/>			<input type="checkbox"/> None	<input type="checkbox"/> Required Once
Long Description: <input type="text"/>			<input type="checkbox"/> Disbursement	<input type="checkbox"/> Update Prior Year
URL: <input type="text"/>			<input type="checkbox"/> Letter Exclusion	<input type="checkbox"/> Access Indicator
Activity Date: <input type="text"/>			<input type="checkbox"/> Perkins NPN	<input type="checkbox"/> Information Access

[illegible]

Set up Review

- Can you list the Banner forms used for Requirements Tracking?
- What are the rules and parameters used to process data?
- What are the rules used to assign students with common application characteristics to a tracking group?



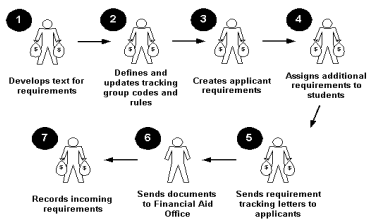
Day-to-Day Objectives

At the end of this section you will be able to

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



Day-to-Day Process



Day to Day Process

- TVPREQA
- TVMASS
- TVAAUTH

TVPREQA Create Title IV Auth from Req



TVMASS Mass Authorization



TVAAUTH Authorization Maintenance

Authorization Code	Start Date	Status	End Date	User ID	Activity Date
10000001	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000002	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000003	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000004	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000005	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000006	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000007	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000008	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000009	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000010	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008



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TVAAUTH Change Status

Authorization Code	Start Date	Status	End Date	User ID	Activity Date
10000001	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000002	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000003	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000004	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000005	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000006	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000007	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000008	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000009	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000010	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008



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TVAAUTH Remove Status

Authorization Code	Start Date	Status	End Date	User ID	Activity Date
10000001	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000002	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000003	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000004	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000005	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000006	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000007	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000008	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000009	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008
10000010	21-Apr-2008	Authorized	21-Dec-2008	PALISAD	21-Apr-2008



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Day-to-Day Review

- How do record a receipt of required documents?
- How do you define fund-specific tracking?
- How do you record receipt of required documents?



Course Summary/Review


As a result of this course we have,


- learned the module permits you to define an unlimited number of documents or statuses that students need to submit or complete
- mastered the banner system processes, forms, and rules used for Requirement Tracking





Questions and Answers





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Thank you for your participation





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