

Banner Student To Financial Aid Interface Training Workbook

Release 8.0 - April 2008

Updated 6/10/2008



SUNGARD HIGHER EDUCATION

What can we help you achieve?

SunGard Higher Education
4 Country View Road
Malvern, Pennsylvania 19355
United States of America
(800) 522 - 4827

Customer Support Center website
<http://connect.sungardhe.com>

Distribution Services e-mail address
distserv@sungardhe.com

Other services

In preparing and providing this publication, SunGard Higher Education is not rendering legal, accounting, or other similar professional services. SunGard Higher Education makes no claims that an institution's use of this publication or the software for which it is provided will insure compliance with applicable federal or state laws, rules, or regulations. Each organization should seek legal, accounting and other similar professional services from competent providers of the organization's own choosing.

Trademark

Without limitation, SunGard, the SunGard logo, Banner, Campus Pipeline, Luminis, PowerCAMPUS, Matrix, and Plus are trademarks or registered trademarks of SunGard Data Systems Inc. or its subsidiaries in the U.S. and other countries. Third-party names and marks referenced herein are trademarks or registered trademarks of their respective owners.

Revision History Log

Publication Date	Summary
April 2008	New version that supports 8.0 software.

Notice of rights

Copyright © SunGard Higher Education 2005-8. This document is proprietary and confidential information of SunGard Higher Education Inc. and is not to be copied, reproduced, lent, displayed or distributed, nor used for any purpose other than that for which it is specifically provided without the express written permission of SunGard Higher Education Inc.



Think before you print.

Table of Contents

Introduction	4
Overview	6
Data Load/Recruiting	7
Funds Management/Billing/Accounts Receivable	12
Packaging and Disbursement	15
Processes and Reports	22
Shared Data Introduction	29
Shared Data Menu/Forms	30
Additional Shared Student Forms	43
Set Up	45
Banner Student to Financial Aid Interface Setup	46
Check a Student's Enrollment	54
Self Check	56
Answer Key for Self Check	59
Day-to-Day Operations	62
Verify a Student's College and Degree Program	63
Check a Student's SAT Score	65
Check On a Student's Housing Contract	66
View a List of Students Receiving a Third-party Benefit	68
Query High School Data	70
Confirm Tuition Information	72
Verify a Student's Admission Status	74
Compare Prior Schools on NSLDS to Schools Attended per Admissions	76
Self Check	78
Answer Key for Self Check	85
Appendix	92
Forms Job Aid	93

Introduction



Course goal

The goal of this course is to describe the interface between the Banner Financial Aid system and the Banner Student system. Attendees will become familiar with viewing information available in the Student system using the various facilities in the Financial Aid module.

The workbook is divided into four sections:

- Introduction
- Set Up
- Day-to-Day Operations
- Reference

Course objectives

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

- verify a student's college and degree program and admission status
- check a student's SAT score, enrollment, and housing contract
- view a list of students receiving a third-party benefit
- query high school data
- confirm tuition information
- compare prior schools on NSLDS to schools attended per Admissions.

Intended audience

Personnel from offices responsible for entering data in the Banner Financial Aid System and sending it to the Banner Student System will learn what data is sent and how the interface works.

Prerequisites

To complete this course, you should have

- completed the Education Practices computer-based training (CBT) tutorial *Banner 8 Fundamentals*, or have equivalent experience navigating in the Banner system
- administrative rights to create and perform the necessary set up in Banner
- a minimum working knowledge of SQL for building rules

Overview

Menu structure

- 📁 **Financial Aid**
 - 📁 Applicant Processing
 - 📁 Need Analysis
 - 📁 Requirements Tracking
 - 📁 Budgeting
 - 📁 Packaging and Disbursement
 - 📁 Funds Management
 - 📁 Electronic Data Exchange
 - 📁 History and Transcripts
 - 📁 Financial Aid Common Functions
 - 📁 **Student System Shared Data**
 - 📄 Summary Academic History Inquiry
 - 📄 Basic Student Information Inquiry
 - 📄 Admissions Application Inquiry
 - 📄 Account Detail Review Inquiry
 - 📄 Degrees and Other Formal Awards Inquiry
 - 📄 Housing Information Inquiry
 - 📄 Prior College Inquiry
 - 📄 High School Inquiry
 - 📄 Test Score Inquiry
 - 📄 Veteran Certification Inquiry
 - 📄 Third Party Contract Inquiry
 - 📄 Billing Exemption Inquiry

Data Load/Recruiting

Financial Aid Data Management menu

The Financial Aid Data Management menu (found under Financial Aid Common Functions) is used to set the guidelines that you wish to use to import data records into Banner. Records may originate by an applicant completing a FAFSA or Profile application. This can create a SPRIDEN record, and does create a RORSTAT record, which is the basic Financial Aid record for the applicant.

If a Recruiting record does not already exist for a student on the data load file, the data load process can create a recruitment record.

-  **Data Management**
-  **Financial Aid Suspended Records Maintenance**
-  **Data Source Rules**
-  **Interface Data Translation Rules**
-  **Data Source Code Validation**

Data Source Code Validation Form (RTVINFC)

This form is used to define all of your possible data sources. It connects with the Student System by allowing you to set a recruitment source code and a contact type code for each recruitment record that is created via data load. The Admissions office will be able to tell which population of its recruitment pool was generated from a Financial Aid data load.

Source Code	Description	Requirements Code	Supplemental Requirements	Status	Recruiting Source	Contact Type	Activity Date
ACT	ACT Tape				F00005	FIN	04-FEB-1995
ACT-CSS	ACT Tape in CSS format				F00005	FIN	04-FEB-1995
AFSA	AFSA Tape	FAFSA		S	F00005	FIN	04-FEB-1995
CSS	CSS Tape		PROFIL	S	F00005	FIN	19-MAY-2003
EDE	EDE Record	FAFSA		S	F00005	FIN	26-MAR-1998
FAH	Financial Aid History Record						17-JAN-2006
GAP-CSS	GAPSFAS Tape in CSS Format				F00005	FIN	09-JAN-1992
ISIR	ISIR Record from CPS						18-AUG-1999
MANUAL	Manual Entry				F00005	FIN	04-FEB-1995
PHEAA	PHEAA Tape				F00005	FIN	09-JAN-1992
SIM	For online N/A simulation only						16-SEP-1997
TRM	Transfer Monitoring Record						08-MAR-2002
USAF	USAF Tape				F00005	FIN	04-FEB-1995
USAFACT	USAF Tape in ACT format				F00005	FIN	04-FEB-1995
USAFCSS	USAF Tape in CSS format				F00005	FIN	04-FEB-1995

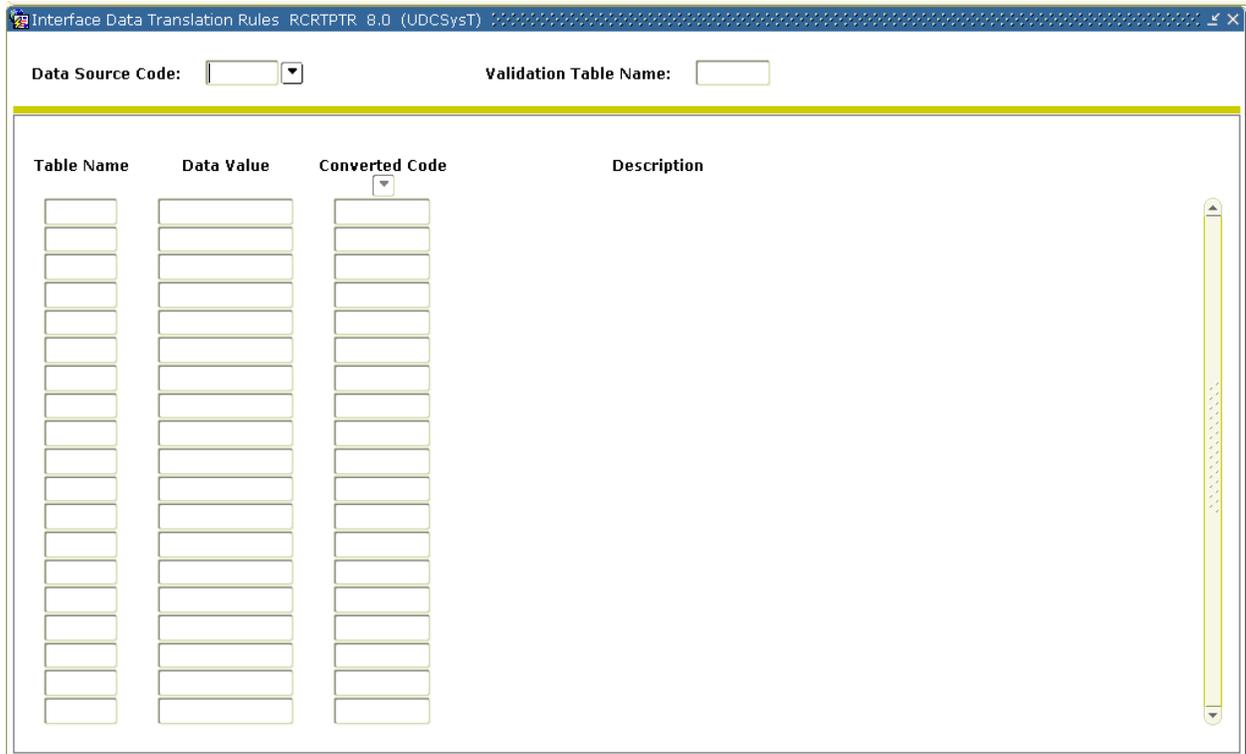
Interface Data Matching Rules Form (RCRINFR)

The Interface Data Matching Rules Form (RCRINFR) has been made obsolete in Banner 7.x. Rules for matching data from Financial Aid sources must now be established and maintained in Common Matching.

Interface Data Translation Rules Form (RCRTPTR)

This form converts data from the codes that exist on the FAFSA or Profile record to those that exist within Banner depending upon how you setup the form.

Major, Marital Status, and SBGI code are data elements that must be translated from the Financial Aid Data Load record to values that exist within the Student System. Use the Interface Data Translation Rules Form (RCRTPTR) to translate these values.



The screenshot shows a web-based form titled "Interface Data Translation Rules RCRTPTR 8.0 (UDCSysT)". At the top, there are two input fields: "Data Source Code:" with a dropdown arrow and "Validation Table Name:" with a text box. Below these is a table with four columns: "Table Name", "Data Value", "Converted Code", and "Description". The "Converted Code" column has a dropdown arrow in its header. The table contains 15 empty rows for data entry. A vertical scrollbar is visible on the right side of the table area.

Table Name	Data Value	Converted Code	Description

Suspended Records Maintenance Form (RCRSUSP)

This form allows you to review records that did not pass the match during the Data Load process. Records that are a partial match; based on the matching rules that you establish are placed in suspense. You must review these records to determine if they are new or matched records. The records are match to General Person records existing in the database.

Financial Aid Suspended Records Maintenance RCRSUSP 8.0 (UDCSysT)

Data Source: Aid Year: 0809

Data Load Record

ID:	<input type="text"/>	Gender:	<input type="text"/>
SSN:	<input type="text"/>	Birth Date:	Day: <input type="text"/> Month: <input type="text"/> Year: <input type="text"/>
Last Name:	<input type="text"/>	Telephone:	<input type="text"/>
First Name:	<input type="text"/>	E-mail:	<input type="text"/>
Middle Initial:	<input type="text"/>	Transaction Number:	<input type="text"/>
Street Line 1:	<input type="text"/>	EFC:	<input type="text"/>
Street Line 2:	<input type="text"/>	Process Date:	<input type="text"/>
City:	<input type="text"/>	Receipt Date:	<input type="text"/>
State or Province:	<input type="text"/>	CSS Code:	<input type="text"/>
Zip or Postal Code:	<input type="text"/>	Override:	<input type="text"/>
Status:	<input type="text"/>	<input type="checkbox"/> Delete Record	
Error:	<input type="text"/>	<input type="button" value="Match"/> <input type="button" value="Select ID"/> <input type="button" value="Load"/>	

Match Results

ID	Change Ind	Name SSN/SIN/TIN	Address	Telephone E-mail	Birth Date Gender
<input type="text"/>					
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Contact Type Code Validation Form (STVCTYP)

The Contact Type Code Validation Form is where the Admissions office can create codes to define the type of contact that a recruitment record had, in order to become a prospect. For example, if the prospect's first contact with the enterprise was at a high school college night, there will be a code for that type of contact. Financial Aid should have a contact code in the event that the student's first contact with the enterprise is via a financial aid data load. This way the Admissions office will know that the student first showed interest in the enterprise by listing the organization on his/her Financial Aid application.

Code	Description	Activity Date
001	Attended College Fair	11-JUL-2005
002	Web Request for Info.	11-JUL-2005
003	Online Chat	11-JUL-2005
004	Phone Conversation	11-JUL-2005
005	Email Exchange	11-JUL-2005
1	Requested Application Packet	07-FEB-2003
2	Requested Athletics Brochure	07-FEB-2003
AAA	Academic Advisor Appt	11-SEP-2007
AAW	Attended Application Workshop	17-OCT-2005
ACA	Advising Received call	22-SEP-2005
ACT	ACT Search or Test Tape Load	23-AUG-1999
ADV	Advising Appointment	21-SEP-2005
AOF	Admissions Offer Extended	06-DEC-2007
CCM	Called Cell Left Message	17-OCT-2005
CCN	Called Cell Not Reached	17-OCT-2005
CFA	College Fair	23-AUG-1999
CHM	Called Home Left Message	17-OCT-2005
CMP	Campus Visit	05-JAN-1988
CNN	College Night	07-APR-1987
CNS	Counselor Visit	25-MAR-1987
CSC	C-RPSC Call	24-OCT-2005

Funds Management/Billing/Accounts Receivable

Funds Management module

The Funds Management module in the Financial Aid system is used to define a fund as disburseable to the Business office.

The Funds Management module defines and monitors an unlimited number of funds, fund types, and fund associated eligibility rules for the purpose of awarding and disbursing financial aid.

Funds Management Form (RFRMGMT)

This is the main form in the Financial Aid module that defines and sets up each fund. You can allocate a budget for an entire fund, set packaging and disbursement options, lock a disbursement, write messages, set tracking requirements, determine fund settings, create an award schedule and disbursement schedule, determine proration amounts, and you have the ability to recoup and back out disbursements.

Fund Management: RFRMGMT 8.0 (UDCSysT)

Aid Year: 0809 Fund Code: []

Fund Packaging Disbursement Disbursement Locks Fund Comments Budget Detail Code Rules Tracking Messages Copy

Base Fund

Fund Source: [] [] Accounts Receivable Detail: [] Active

Fund Type: [] []

Federal Fund ID: []

Long Description: []

Aid Year Specific

Prior Balance: []

Transferred: []

Budget Allocated: []

Total Allocated: []

Available to Offer: []

Over Commitment Percent: []

Fund Base Data Form (RFRBASE)

This form defines basic characteristics of each fund and is used to build the interface with the Student System.

Fund Code	Short Description	Accounts Receivable Detail	Detail Code Active	Fund Source	Fund Type	Federal Fund ID	Fund Cross Reference	Print Order	Message Number	Fund Category Exists	Fund Active	
A+	A+ Grant	A+	<input type="checkbox"/>	STAT	GRNT			292	33989	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ABC	ABC Scholarship	ABC	<input checked="" type="checkbox"/>	INST	SCHL			21	3333	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ACCEL	ACCEL Scholarship	ASP	<input checked="" type="checkbox"/>	INST	GRNT			10	3254	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ACCF	ACC Foundation Scholarship	ACCF	<input checked="" type="checkbox"/>	INST	SCHL			304	9099	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ACCT	Accounting Scholarship	ACCT	<input checked="" type="checkbox"/>	INST	SCHL			398	39389	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ACG	Academic Competitiveness Grant	ACG	<input checked="" type="checkbox"/>	FDRL	GRNT	ACG		2928	93938	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ACG2	Academic Comp Grant Year 2	ACG2	<input checked="" type="checkbox"/>	FDRL	GRNT	ACG		299	39389	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ADAMS	Adams Scholarship Fund	FSA	<input checked="" type="checkbox"/>	INST	SCHL			99	3241	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ADMS	Admissions Scholarship	ADMS	<input checked="" type="checkbox"/>	INST	SCHL			109	3909	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ALLEN	Allen Scholarship Fund	FALS	<input checked="" type="checkbox"/>	INST	SCHL			26	3263	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ALTL	Alternative Loan	ALTL	<input checked="" type="checkbox"/>	OTHR	LOAN			89	1098	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ALUM	Alumni Scholars	ALUM	<input checked="" type="checkbox"/>	STAT	SCHL			3988	39388	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ASAP	Alabama Student Assistance Pro	ASAP	<input checked="" type="checkbox"/>	INST	GRNT			3939	393939	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ASU	ASU Grant	ASU	<input checked="" type="checkbox"/>	INST	GRNT			397	708	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ATHH	Athletic Housing	ATHH	<input checked="" type="checkbox"/>	INST	GRNT			2020	303039	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ATHL	Athletic Scholarship	ATH	<input checked="" type="checkbox"/>	INST	SCHL			398	239484	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
AUB	American Univ of Beirut Grant	AUB	<input checked="" type="checkbox"/>	INST	GRNT				93938	292389	<input type="checkbox"/>	<input checked="" type="checkbox"/>
AUG	Anderson University Grant	AUG	<input checked="" type="checkbox"/>	INST	GRNT			7687	86876	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Long Description: A+ Grant

Detail Code Control Form (TSADETC)

This form is used to define the detail codes to be used in the Accounts Receivable Module. When tied to a fund on RFRBASE it allows the fund to disburse to the student's account.

The screenshot displays the 'Detail Code Control Page - Student TSADETC 8.0 (UDCSysT)' interface. It features three distinct sections, each representing a different detail code entry. Each section contains the following fields and options:

- Detail Code:** A text input field containing the code and its description (e.g., '3PT 3 Peat', 'A&H Arts and Humanities', 'AAAC Contract Charge').
- Type:** A dropdown menu (e.g., 'C').
- Category:** A dropdown menu (e.g., 'FEE', 'CNT').
- Grant Type:** A dropdown menu.
- Priority:** A dropdown menu (e.g., '990', '980').
- Refund Code:** A dropdown menu.
- Payment Options:** A set of checkboxes including 'Direct Deposit', 'Refundable', and 'Receipt'.
- Administrative Options:** A set of checkboxes including 'Term Based', 'Like Term', 'Like Aid Year', 'GL Enterable', and 'Active'.
- Pay Type:** A dropdown menu (e.g., 'N').
- Tax Type:** A dropdown menu (e.g., 'B').
- Additional Options:** A set of checkboxes including 'Title IV', 'Institutional Charges', 'Exclude Invoice Print', and 'Payment History'.
- Defaults:** A sub-section with fields for 'Amount', 'Term', and 'Effective Date'.

Packaging and Disbursement

Definition

Packaging is a Financial Aid process that awards applicants various funds based on merit or financial need.

Packaging Options Form (RPROPTS)

The Packaging Options Form (RPROPTS) is where you set all of your global packaging options. These rules will determine how aid is awarded and processed.

Packaging Options RPROPTS 8.0 (UDCSysT)

Aid Year: 2008-2009 Aid Year

Packaging Options

Default Estimated Enrollment: Use Estimated Enrollment

Package Using Estimated EFC

Package if SAR C-Flag Exists

Additional Stafford Eligibility Default

Source of Award History:

Offer Expiration Days:

Tracking Requirement Status:

Exemptions and Contracts Options

Interface Exemptions

Interface Third Party Contracts

Always Use Estimated

Assume Full Time

Three Quarter Time Percentage:

Half Time Percentage:

Less than Half Time Percentage:

Disbursement Options

Disburse if Charges Not Accepted

Allow Memos when Disbursement is Backed Out

Enrollment Option for Disbursement:

Disburse if SAR C-Flag Exists

Exemptions and contracts

Banner allows you to incorporate the amount of any exemptions or third-party contracts that a student is receiving into his/her Financial Aid package. Contracts and exemptions are recorded on the Accounts Receivable System. You have the ability, via packaging rules, to interface the Financial Aid System with the Accounts Receivable System. If you establish your packaging rules so that they interface with contracts and exemptions, then these awards will be incorporated into a student's need calculation.

Contracts and exemptions for the Accounts Receivable System are created on the Contract Authorization Form (TSACONT) and the Exemption Authorization Form (TSAEXPT).

The Financial Aid System has two rule forms, the Third Party Contract Rules Form (RPRCONT) and the Exemption Rules Form (RPREXPT). RPREXPT lists the exemption codes for a term and estimates the amount of an exemption, while RPRCONT defines third-party contracts for a specified term and estimates the amount of a third-party contract.

Establish codes in Accounts Receivable

Financial Aid cannot access Accounts Receivable contract and exemption codes until they have been established in the Accounts Receivable System. You indicate that you wish to interface with Accounts Receivable contracts and exemptions on the Packaging Options Form (RPROPTS).

Review students with a negative unmet need.

It is a good idea to review students that have a negative value for unmet need. Run the Calculated Values Process (RORCALC) for all students, and you may request a listing of all students that have been over-awarded. If you run this report on a regular basis, then you should catch any students that become over-awarded as a result of the interface between exemptions and contracts.

About the disbursement process

Certain Financial Aid processes need to be validated against Student information. A student's financial aid should not pay to account's receivable if the student is not enrolled. Thus, the disbursement process will check a student's enrollment status in the Student System before paying financial aid to a student's account. Many other financial aid processes check data across systems to the Student System for validation purposes.

Fund Base Data Form (RFRBASE)

In order for the Financial Aid Disbursement process to work properly, each financial aid fund must have a corresponding Accounts Receivable Detail code. These codes must have a "one to one" relationship. Each fund code must have a separate and distinguished A/R Detail code. You also determine the type of fund – whether it is a loan, grant, work, or scholarship.

Fund Code	Short Description	Accounts Receivable Detail	Detail Code Active	Fund Source	Fund Type	Federal Fund ID	Fund Cross Reference	Print Order	Message Number	Fund Category Exists	Fund Active
A+	A+ Grant	A+	<input type="checkbox"/>	STAT	GRNT			292	33989	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ABC	ABC Scholarship	ABC	<input checked="" type="checkbox"/>	INST	SCHL			21	3333	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ACCEL	ACCEL Scholarship	ASP	<input checked="" type="checkbox"/>	INST	GRNT			10	3254	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ACCF	ACC Foundation Scholarship	ACCF	<input checked="" type="checkbox"/>	INST	SCHL			304	9099	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ACCT	Accounting Scholarship	ACCT	<input checked="" type="checkbox"/>	INST	SCHL			398	39389	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ACG	Academic Competitiveness Grant	ACG	<input checked="" type="checkbox"/>	FDRL	GRNT	ACG		2928	93938	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ACG2	Academic Comp Grant Year 2	ACG2	<input checked="" type="checkbox"/>	FDRL	GRNT	ACG		299	39389	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ADAMS	Adams Scholarship Fund	FSA	<input checked="" type="checkbox"/>	INST	SCHL			99	3241	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ADMS	Admissions Scholarship	ADMS	<input checked="" type="checkbox"/>	INST	SCHL			109	3909	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ALLEN	Allen Scholarship Fund	FALS	<input checked="" type="checkbox"/>	INST	SCHL			26	3263	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ALTL	Alternative Loan	ALTL	<input checked="" type="checkbox"/>	OTHR	LOAN			89	1098	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ALUM	Alumni Scholars	ALUM	<input checked="" type="checkbox"/>	STAT	SCHL			3988	39388	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ASAP	Alabama Student Assistance Pro	ASAP	<input checked="" type="checkbox"/>	INST	GRNT			3939	393939	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ASU	ASU Grant	ASU	<input checked="" type="checkbox"/>	INST	GRNT			397	708	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ATHH	Athletic Housing	ATHH	<input checked="" type="checkbox"/>	INST	GRNT			2020	303039	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ATHL	Athletic Scholarship	ATH	<input checked="" type="checkbox"/>	INST	SCHL			398	239484	<input type="checkbox"/>	<input checked="" type="checkbox"/>
AUB	American Univ of Beirut Grant	AUB	<input checked="" type="checkbox"/>	INST	GRNT			93938	292389	<input type="checkbox"/>	<input checked="" type="checkbox"/>
AUG	Anderson University Grant	AUG	<input checked="" type="checkbox"/>	INST	GRNT			7687	86876	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Long Description: A+ Grant

Detail Code Control Form (TSADETC)

The Detail Code Control Form (TSADETC) is to Accounts Receivable what the Fund Management Form (RFRMGMT) is to Financial Aid. This is where every item that could possibly show up on a student's account is created. All of the characteristics of a detail code are established on this form.

The screenshot displays the 'Detail Code Control Page - Student TSADETC 8.0 (UDCSysT)' interface. It contains three separate form sections, each for a different detail code. Each section includes the following fields and options:

- Detail Code:** A text input field with a dropdown arrow.
- Type:** A dropdown menu.
- Category:** A dropdown menu.
- Grant Type:** A dropdown menu.
- Priority:** A dropdown menu.
- Refund Code:** A dropdown menu.
- Direct Deposit:**
- Refundable:**
- Receipt:**
- Term Based:**
- Like Term:**
- Like Aid Year:**
- GL Enterable:**
- Active:**
- Pay Type:** A dropdown menu.
- Tax Type:** A dropdown menu.
- Title IV:**
- Institutional Charges:**
- Exclude Invoice Print:**
- Payment History:**

Each section also features a 'Defaults' panel on the right side, containing:

- Amount:** A text input field.
- Term:** A dropdown menu.
- Effective Date:** A date selection field with a calendar icon.

The three detail codes shown are:

- 3PT 3 Peat:** Type: C, Category: FEE, Grant Type: (empty), Priority: 990, Refund Code: (empty), Direct Deposit: , Refundable: , Receipt: , Term Based: , Like Term: , Like Aid Year: , GL Enterable: , Active: , Pay Type: N, Tax Type: (empty), Title IV: , Institutional Charges: , Exclude Invoice Print: , Payment History: .
- A&H Arts and Humanities:** Type: C, Category: FEE, Grant Type: (empty), Priority: 990, Refund Code: (empty), Direct Deposit: , Refundable: , Receipt: , Term Based: , Like Term: , Like Aid Year: , GL Enterable: , Active: , Pay Type: N, Tax Type: (empty), Title IV: , Institutional Charges: , Exclude Invoice Print: , Payment History: .
- AAAC Contract Charge:** Type: C, Category: CNT, Grant Type: (empty), Priority: 980, Refund Code: (empty), Direct Deposit: , Refundable: , Receipt: , Term Based: , Like Term: , Like Aid Year: , GL Enterable: , Active: , Pay Type: N, Tax Type: B, Title IV: , Institutional Charges: , Exclude Invoice Print: , Payment History: .

About Financial Aid awards

The Banner Financial Aid Disbursement process demonstrates the value of an integrated system. Financial Aid awards that have been made on the Financial Aid system can display on the Accounts Receivable system in three different stages.

Disbursement type	Stage Description
Memos	<p>Meaning the student has been awarded the money, but the student's record has not been finalized. This type of financial aid may change.</p> <p>A memo'ed award is not actually posted to a student's account. It displays so that accounts receivable knows that aid is pending.</p>
Authorizations	<p>Authorized aid tells accounts receivable that the student's record has been finalized, but that the enterprise has not yet reached the disbursement date for the term.</p> <p>An authorized award is not actually posted to a student's account. It displays so that accounts receivable knows that aid is pending.</p>
Payments	<p>Payment aid is aid that has been finalized and posted to a student's account.</p>

Chart of Accounts functions

When creating your funds on the Fund Management Form (RFRMGMT), you must create a balance for each fund. The awarding and disbursement processes will not allow you to award or disburse more than what you have allocated. Financial Aid disbursements update the Account Receivable System, which then ties into the enterprise's chart of accounts.

Creating a maximum amount of aid to be disbursed on RFRMGMT ensures that the enterprises chart of accounts does not receive more aid than is available.

Voiding Financial Aid payments

If the case arises when a Financial Aid payment has been made to a student and an adjustment needs to be made due to a change in the student's status, Banner can handle this process through the award forms by changing the awarded amount and re-running disbursements to adjust the student account.

If disbursements have been run in the finalized mode, a manual adjustment has to be made on RPAAPMT. Add a new record in the Disbursement Schedule block entering values for Term, Fund Code, Scheduled Disbursement date and adjustment amount, plus or minus. Run disbursement again, and the adjustment will occur.

Processes and Reports

Introduction

The following processes and reports are available for the Student to Financial Aid Interface.

Data Discrepancies Report (RSRDSCP)

The Data Discrepancy report allows the Financial Aid office to run a report that compares data that exists both in the Student system and in the Financial Aid system. The report will print the values from both systems and display any discrepancies that exist.

The screenshot shows a web-based configuration window for the RSRDSCP report. The window title is "Process Submission Controls GJAPCTL 8.0 (UDCSysT)".

Process: RSRDSCP (dropdown) Data Discrepancies Report (text input)
Parameter Set: (dropdown)

Printer Control
Printer: DATABASE (dropdown) **Special Print:** (text input) **Lines:** 55 (text input) **Submit Time:** (text input)

Parameter Values

Number	Parameters	Values
01	Aid Year	
02	Sorting Sequence	N
03	Compare Last Names	
04	Compare First Names	
05	Compare Middle Initials	
06	Compare Social Security Nos.	
07	Compare Birth Dates	
08	Compare Citizenship Codes	

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

Submission
 Save Parameter Set as **Name:** (text input) **Description:** (text input) Hold Submit

Financial Aid Student Billing Report (RPRSBPR)

The Financial Aid Student Billing Payment Report (RPRSBPR) displays detailed information on any financial aid payments entered in the Accounts Receivable module of the Student System.

Process: RPRSBPR F/A Student Billing Payment Parameter Set:

Printer Control
Printer: DATABASE Special Print: Lines: 55 Submit Time:

Parameter Values

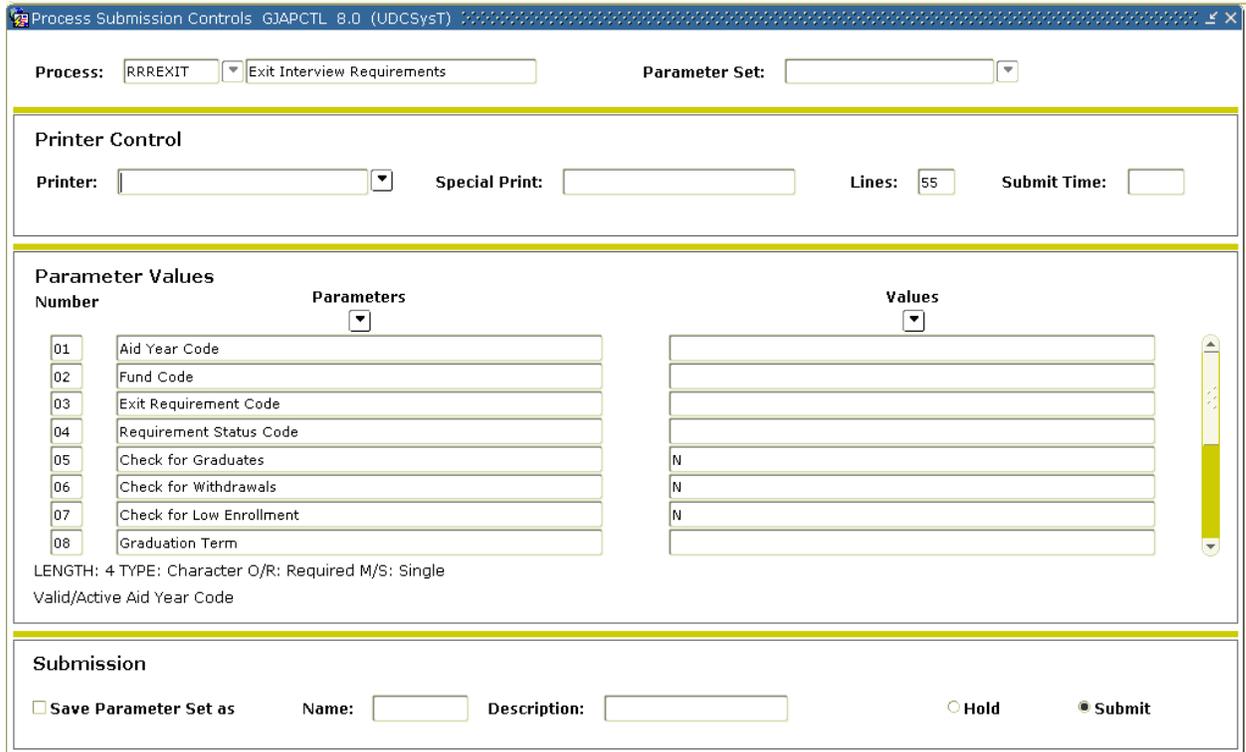
Number	Parameters	Values
01	Aid Year	
02	Report Selection Query ID	
03	Application Code	
04	Term Code	
05	Effective Date	
06	Memo Detail Option	Y
07	Sorting Choice	N
08	Sorting Sequence	A

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

Submission
 Save Parameter Set as Name: Description: Hold Submit

Exit Interview Requirement process (RRREXIT)

The Exit Interview Requirement process will look at the Student System to determine which students are scheduled for graduation for a particular term, and post the federally mandated exit interview requirement to their records. The process can also be set to identify students who withdrew during a term or failed to reenroll.



Process: RRREXIT Exit Interview Requirements Parameter Set:

Printer Control
Printer: Special Print: Lines: 55 Submit Time:

Parameter Values

Number	Parameters	Values
01	Aid Year Code	
02	Fund Code	
03	Exit Requirement Code	
04	Requirement Status Code	
05	Check for Graduates	N
06	Check for Withdrawals	N
07	Check for Low Enrollment	N
08	Graduation Term	

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

Submission
 Save Parameter Set as Name: Description: Hold Submit

Enrollment freeze - current enrollment vs. Financial Aid enrollment (RSRENRL)

The RSRENRL process adds or updates credit hours, billing hours, adjusted hours, and attending hours by term from student enrollment to financial aid.

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

- Process:** A dropdown menu set to "RSRENRL" and a text field containing "Financial Aid Enrollment Hours".
- Parameter Set:** A dropdown menu.
- Printer Control:** A section with a "Printer:" dropdown set to "DATABASE", a "Special Print:" text field, "Lines:" set to "55", and a "Submit Time:" text field.
- Parameter Values:** A table with two columns: "Number" and "Parameters". Below the table are two columns of input fields for "Values".

Number	Parameters	Values
01	Aid Year	
02	Term Code	
03	Sorting Sequence Option	N
04	Selection ID	
05	Application Code	
06	Creator ID	
07	User ID	
08	Load Term Enrollment Option	U
- Submission:** A section with a checkbox for "Save Parameter Set as", "Name:" and "Description:" text fields, and radio buttons for "Hold" and "Submit".

Additional text below the Parameter Values table: "LENGTH: 4 TYPE: Character O/R: Required M/S: Single Valid/Active Aid Year Code"

Aid Period/Term Rules Form (RORTPRD)

The Aid Period/Term Rules Form enables a user to specify the terms that you want to associate with an aid period. This is necessary because awards are given by aid period, while the funds are disbursed by terms.

Aid Year: Aid Period:

Aid Period Base Information

EFC Percent: Percentage of Full-Year:
EFC Proration: Pell Percentage of Full-Year:

Aid Period/Term Code Rules

Term Code	Term Description	Start Date	End Date	Activity Date
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>

Shared Data Introduction

Overview

The Student System Shared Data module integrates the Banner Student system with Financial Aid. This option permits you to view information in

- Recruiting
- Admissions
- Registration
- Housing
- Accounts Receivable
- Academic History.

Information in these Student system areas is important to the financial aid decision-making process.

Shared Data Menu/Forms

Shared data

Data is shared with the Banner Student system through a series of views that contain information that the Financial Aid system may require for certain processes. This information is available through a series of inquiry-only forms listed on the Student System Shared Data menu. Student system data is shared through these views, rather than by direct access of the Student system tables, for the following reason. If Banner Financial Aid is installed as a stand-alone product in an environment where Banner Student is not installed, these views can be created as tables by the institution and periodically populated with data from its Student system.

Inquiry forms

Forms accessible through the Student System Shared Data menu are all Inquiry forms, and have the letter / for the third letter in their seven-character form name. This means that you can query the form for information; however, you cannot change or update the data. The forms described in this lesson flow in the order that they appear on the Student System Shared Data Menu.

Summary Academic History Inquiry Form (RSIHIST)

The Summary Academic History Inquiry Form allows you to review a student's term, cumulative GPA, and hours.

The screenshot shows a web browser window titled "Summary Academic History Inquiry RSIHIST 8.0 (UDCSysT)". The interface includes a search area with "ID:" and "Level:" fields. Below this, there are fields for "First Term Attended:", "Last Term Attended:", "Last Term Attended Standing:", and "Last Term Attended Class Code:". The main section of the form is a table with three columns: "Overall Institution", "Overall Transfer", and "Overall". The rows in the table are: "Attempted Hours:", "Passed Hours:", "Earned Hours:", "GPA Hours:", "Quality Points:", and "GPA:". Each cell in the table contains an empty input field.

	Overall Institution	Overall Transfer	Overall
First Term Attended:	<input type="text"/>		
Last Term Attended:	<input type="text"/>		
Last Term Attended Standing:	<input type="text"/>		
Last Term Attended Class Code:	<input type="text"/>		
Attempted Hours:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Passed Hours:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Earned Hours:	<input type="text"/>	<input type="text"/>	<input type="text"/>
GPA Hours:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Quality Points:	<input type="text"/>	<input type="text"/>	<input type="text"/>
GPA:	<input type="text"/>	<input type="text"/>	<input type="text"/>

Timing of freeze process

Typically, the freeze process is run at the conclusion of your 'drop/add' period or at the end of your tuition refund period. This way, if a student is full time when the freeze process is run, dropping classes will not affect the way financial aid views his/her enrollment; it's still full-time for financial aid purposes.

Adjusting frozen enrollment

Frozen financial aid enrollment may be adjusted on a manual basis on several forms (for example, RPAAWRD, RPAAPMT, or ROAENRL). This is typically used for students who are legitimately allowed to add courses after the 'drop/add' period or for students cross registering at another college where you are authorized to pay the aid based on the combined enrollment.

Every time a student is included in the batch job to freeze enrollment, the financial aid enrollment is updated with the actual enrollment data from the Student system at the time the job is run. If you have made manual adjustments to the financial aid enrollment and include that student in the RSRENRL process, those manual adjustments are not replaced with actual Student system enrollment.

Include or exclude students from RSRENRL

The Financial Aid Enrollment Process (RSRENRL) allows you to update all existing records and add new records or to only add new records for the term.

The process also allows you to load Financial Aid Attending hours. When loading Financial Aid Attending hours, the effective date of the hours will be loaded to allow you to determine the enrollment status as of a specific date. For any funds that you have indicated to use the Attending Hours functionality, the enrollment as of the date disbursement is run will be used. The ability to update existing records and add new records or to only add new records for the term is provided for maintaining Financial Aid Attending Hours.

If Attending Hours functionality is indicated for funds and you freeze Financial Aid Hours, you should also freeze the Financial Aid Attending Hours.

Basic Student Information Inquiry Form (RSISTDN)

The Basic Student Information Inquiry Form allows you to view a student's non-course related information. This form includes information such as campus, level, status, type, residency, degree, college, major, etc.

The screenshot displays the 'Basic Student Information Inquiry RSISTDN 8.0 (UDCSysT)' window. At the top, there is an 'ID:' field with a dropdown arrow and a text input box. Below this, the form is organized into several sections:

- General Information:** Fields for Campus, Level, Status, Type, Beginning Effective Term, Ending Effective Term, and Expected Graduation Date.
- Standing and Residency:** Fields for History Standing, Term, Override Standing, Term, and Residency.
- Primary Curriculum:** Fields for Degree, College, Major 1, Major 2, Minor 1, Minor 2, Concentration 1, and Concentration 2.
- Secondary Curriculum:** Fields for Degree, College, Major 1, Major 2, Minor 1, Minor 2, Concentration 1, and Concentration 2.

Each field is represented by a small square icon followed by a text input box. A vertical scrollbar is visible on the right side of the form area.

Admissions Application Inquiry Form (RSIAPPL)

The Admissions Application Inquiry Form allows you to review a student's admissions application-related information. This form includes information such as entry term, level, type, residency, admission status, major, etc.

The screenshot shows a web browser window titled "Admissions Application Inquiry RSIAPPL 8.0 (UDCSysT)". The interface includes an "ID:" field with a dropdown arrow and a text input box. Below this is a list of fields for application details, each with a small square input box: Entry Term, Application Number, Application Date, Campus, Site, Date, Level, Student Type, Residency, Admission Type, Application Status, Application Decision, Student Acceptance, Significant Decision, Institution Acceptance, and Application Inactive. To the right, there are two sections: "Primary Curriculum" and "Secondary Curriculum". Each section contains fields for Degree, College, and Major, with the College and Major fields split into two sub-input boxes. A vertical scrollbar is visible on the right side of the form area.

Account Detail Review Inquiry Form (RSIAREV)

The Account Detail Review Inquiry Form enables you to review charge and payment information for an account. This form receives account detail information from many functional areas, such as transcript fees from academic history, application fees from admissions, registration charges from registration and housing, and meal and phone charges from location management and housing.

All fields in the Account Detail section are display-only fields, and display charges and payments to an account. All activity for this account appears within this section. The effective date of the charge or payment determines the current amount due. The form does not use charges or payments with an effective date greater than today in the calculation. Charges and payments created in other modules are indicated by the source.

The balance of the account and the current amount due are calculated and displayed on the last line of this form. Any changes to the account information will modify these balances. The **Query Balance** is the sum of all charges and payments queried and displayed to date. The **Acct Balance** is the sum of all charges and payments. The **Amount Due** is the sum of all charges and payments with an effective date less than or equal to the current date, plus the sum of any memo charges and payments recorded for the account.

Account Detail Review Inquiry RSIAREV 8.0 (UDCSysT)

ID:

Account Detail

Detail Code	Transaction Number	Charge Original	Payment	Balance	Term	Transaction Paid	Source Code	Effective Date

Account Summary

Query Balance	Account Balance	Amount Due	Memo Balance	Authorized Aid Balance	Applicant Pay?	NSF Count
<input type="text"/>	<input type="text"/>	<input type="text"/>				

Degrees and Other Formal Awards Inquiry Form (RSIDEGR)

The Degrees and Other Formal Awards Inquiry Form allows you to review degree and award-related information for a student. Degrees are captured by number to provide an optional method of identifying the student's primary degree, if more than one degree exists. This form displays the degree number, degree code and description, applied date, graduation date, degree status and description, bulletin year, level code and description, term code, primary curriculum, and secondary curriculum.

Degrees and Other Formal Awards Inquiry RSIDEGR 8.0 (UDCSysT)

ID:

Degree Number:

Degree:

Status:

Level:

Term:

Applied Date:

Graduation Date:

Bulletin Year:

Primary Curriculum

College:

Major 1:

Major 2:

Minor 1:

Minor 2:

Concentration 1:

Concentration 2:

Concentration 3:

Secondary Curriculum

College:

Major 1:

Major 2:

Minor 1:

Minor 2:

Concentration 1:

Concentration 2:

Concentration 3:

Housing Information Inquiry Form (RSIHOUS)

The Housing Information Inquiry Form displays information that pertains to a student's dormitory room assignment, any special attributes for the room, and meal plan assignments. The Room Assignments section lists room assignment information such as the term code, start date, end date, status code and date, building code, room code, phone number, assessed indicator, rate code, total days, total months, and total terms. The Special Attributes section is a view-only section that displays the term code, attribute code and description, and match indicator. The Meal Assignments section displays the term code, start date, end date, status code and date, meal plan code, total days, total months, total terms and assessed indicator.

The screenshot shows the 'Housing Information Inquiry RSIHOUS 8.0 (UDCSysT)' application window. At the top, there is an 'ID:' field with a dropdown arrow and a text input box. Below this are three main sections, each separated by a yellow horizontal line:

- Room Assignments:** This section contains several input fields: 'Term', 'Start', 'End', 'Status', 'Building', 'Room', 'Phone: ()', 'Assessed', 'Rate', 'Days', 'Months', and 'Terms'. Each field is represented by a small text box or a checkbox.
- Special Attributes:** This section is a table with three columns: 'Term', 'Code', and 'Must Match'. There are five rows of data, each with a 'Term' box, a 'Code' box, a larger text input box for the description, and a 'Must Match' checkbox.
- Meal Assignments:** This section contains input fields for 'Term', 'Start', 'End', 'Status', 'Plan', 'Days', 'Months', 'Terms', and 'Assessed'.

Prior College Inquiry Form (RSIPCOL)

The Prior College Inquiry Form allows you to check a person's prior college history, such as the college address, degrees, and period of attendance. The data displays in College Code sequence.

The screenshot shows a web-based form titled "Prior College Inquiry RSIPCOL 8.0 (UDCSysT)". The form includes an "ID:" field with a dropdown arrow and a text input box. Below this is a horizontal yellow separator line. The main form area contains several fields with labels on the left and input boxes on the right:

- College Code:** Two text input boxes.
- Address:** Three stacked text input boxes.
- City:** One text input box.
- State or Province:** Two text input boxes.
- Zip or Postal Code:** One text input box.
- Country:** Two text input boxes.
- Level:** Two text input boxes.
- Attend Period:** One text input box.
- Attend From:** One text input box.
- Attend To:** One text input box.
- Degree Code:** Two text input boxes.

High School Inquiry Form (RSIHSCH)

The High School Inquiry Form allows you to view a student's high school information such as school name and address, graduation date, overall GPA, and class rank/size.

High School Inquiry RSIHSCH 8.0 (UDCSysT)

ID:

High School:

Address:

City:

Zip or Postal Code:

State or Province:

Country:

Graduation Date:

GPA:

Class Rank:

Class Size:

Percentile:

College Preparation:

Diploma:

Test Score Inquiry Form (RSITEST)

The Test Score Inquiry Form displays a student's test history.

Test Score Inquiry RSITEST 8.0 (UDCSysT)

ID:

Test Code	Score	Source	Administration Type	Date Taken
<input type="text"/>				
<input type="text"/>				
<input type="text"/>				
<input type="text"/>				
<input type="text"/>				

Veteran Certification Inquiry Form (RSIVETN)

The Veteran Certification Inquiry Form allows you to view veteran-related information by term for a student.

Veteran Certification Inquiry RSIVETN 8.0 (UDCSysT)

ID:

Veteran Code	Term	Certification Credit Hours	Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Billing Exemption Inquiry Form (RSIEXPT)

The Billing Exemption Inquiry Form displays those students authorized for a billing exemption for a given term code. A *D* in the **Delete** field indicates that the person is no longer authorized for the exemption.

The screenshot shows a web browser window titled "Billing Exemption Inquiry RSIEXPT 8.0 (UDCSysT)". Below the title bar, there are two dropdown menus: "Exemption:" and "Term:". Below these is a section titled "Exemption Base" with a "Description:" label and an empty text input field. The main section is titled "Person Authorization" and contains a table with four columns: "Delete", "ID Number", "Person Name", and "Payment Amount". The table has 15 rows, each with an empty checkbox in the "Delete" column, an empty text box in the "ID Number" column, an empty text box in the "Person Name" column, and an empty text box in the "Payment Amount" column. A vertical scrollbar is visible on the right side of the table.

Delete	ID Number	Person Name	Payment Amount
<input type="checkbox"/>			

Additional Shared Student Forms

Admission Application Decision Code Validation Form (STVAPDC)

This form defines Admission Application Decision codes. These codes may be used when using views such as ROVADxx to identify students who have paid a deposit or met some other criteria of admissions. These codes can be used in tracking, budgeting or packaging group rules.

Decision Code	Description	Significant Decision	Institution Acceptance	Applicant Acceptance	Inactive Application	Institution Rejection	Display On Web	Voice Response Eligible	Voice Response Message	Activity Date
01	Pending College Review Curriculum Status: [dropdown]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		17-DEC-2002
02	Department Approval Curriculum Status: [dropdown]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		14-SEP-2006
03	Final Review Curriculum Status: [dropdown]	<input type="checkbox"/>	<input type="checkbox"/>		24-JUN-1991					
04	Application Rejected Curriculum Status: [dropdown]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		13-MAY-1999
10	Applicant Accepted butnot paid Curriculum Status: [dropdown]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		05-MAR-2001
25	Institution Acceptance Curriculum Status: [dropdown]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		28-AUG-2002
30	Quick Entry Curriculum Status: [dropdown]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		08-JUL-1998
31	Quick Entry/Non-Matriculated Curriculum Status: [dropdown]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		13-MAR-1991
35	Cleared to Attend Curriculum Status: [dropdown]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	11-JAN-2007
40	Applicant Rejected Offer Curriculum Status: [dropdown]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		07-AUG-1987

Campus Code Validation Form (STVCAMP)

The Campus Code Validation Form (STVCAMP) defines Campus codes that are used on the Institution Financial Aid Options Form (ROAINST) for Pell Grant disbursement processing.

Campus Code Validation STVCAMP 8.0 (UDCSysT)

Code	Description	District	Activity Date
001	Brampton		16-OCT-2007
1	College Station		16-OCT-2007
2	Fullerton		16-OCT-2007
4	Continuing Education		08-NOV-1999
5	Study Abroad		10-SEP-2004
999	All Campuses		09-DEC-1999
A	Addison Campus		04-JAN-2008
ACC	ACCESS		14-NOV-2006
AKO	Akoranga Campus AUT NZ		04-NOV-2007
AL	Alma		16-OCT-2007
B	Peru		02-NOV-2005
BKN	Brooklyn		16-OCT-2007
BOE	Boulder Evening		14-NOV-2006
BOU	Boulder		16-OCT-2007
BWD	Brentwood		16-OCT-2007
C	City		16-OCT-2007
CCC	Coastline Community College		24-MAY-2005
CLV	Concordia Language Village		03-APR-2007
CS	Colorado Springs		16-OCT-2007
CWP	C.W. Post		16-OCT-2007
D	De Anza		15-OCT-2007
DEN	Denver		16-OCT-2007

Set Up



Introduction

The purpose of this section is to outline the set-up process and detail the procedures to run the Student to Financial Interface process at your institution.

Objectives

At the end of this section, you will be able to set up the Student to Financial Aid Interface.

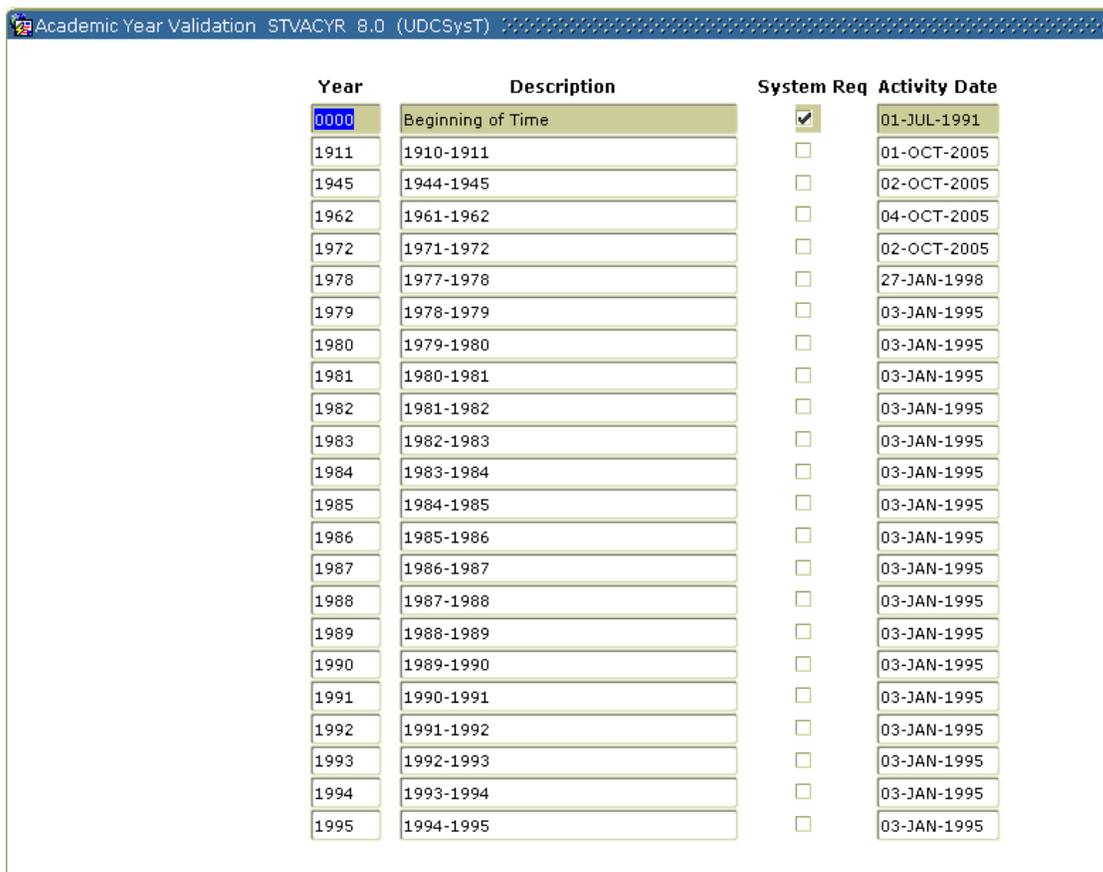
Banner Student to Financial Aid Interface Setup

Introduction

The Financial Aid system interfaces directly with the Banner Student system. This interface requires that you populate certain Student fields in order to take full advantage of the Financial Aid system features. There are numerous tables in the Student system that can be accessed by Financial Aid processes. The main accessed tables will be discussed in this section.

Academic Year Validation Form (STVACYR)

This form is used to create, update, validate, insert, and delete student academic years. Each aid year will have specific terms that are associated with it. On the financial aid side, terms are associated to aid years, aid periods, and loan periods.



Year	Description	System Req	Activity Date
0000	Beginning of Time	<input checked="" type="checkbox"/>	01-JUL-1991
1911	1910-1911	<input type="checkbox"/>	01-OCT-2005
1945	1944-1945	<input type="checkbox"/>	02-OCT-2005
1962	1961-1962	<input type="checkbox"/>	04-OCT-2005
1972	1971-1972	<input type="checkbox"/>	02-OCT-2005
1978	1977-1978	<input type="checkbox"/>	27-JAN-1998
1979	1978-1979	<input type="checkbox"/>	03-JAN-1995
1980	1979-1980	<input type="checkbox"/>	03-JAN-1995
1981	1980-1981	<input type="checkbox"/>	03-JAN-1995
1982	1981-1982	<input type="checkbox"/>	03-JAN-1995
1983	1982-1983	<input type="checkbox"/>	03-JAN-1995
1984	1983-1984	<input type="checkbox"/>	03-JAN-1995
1985	1984-1985	<input type="checkbox"/>	03-JAN-1995
1986	1985-1986	<input type="checkbox"/>	03-JAN-1995
1987	1986-1987	<input type="checkbox"/>	03-JAN-1995
1988	1987-1988	<input type="checkbox"/>	03-JAN-1995
1989	1988-1989	<input type="checkbox"/>	03-JAN-1995
1990	1989-1990	<input type="checkbox"/>	03-JAN-1995
1991	1990-1991	<input type="checkbox"/>	03-JAN-1995
1992	1991-1992	<input type="checkbox"/>	03-JAN-1995
1993	1992-1993	<input type="checkbox"/>	03-JAN-1995
1994	1993-1994	<input type="checkbox"/>	03-JAN-1995
1995	1994-1995	<input type="checkbox"/>	03-JAN-1995

Term Code Validation Form (STVTERM)

The Term Code Validation Form (STVTERM) is the validation form that defines the terms within Banner. Banner is a term driven system. Terms are the building blocks within Banner. Financial Aid is defined by aid year and by aid period. The terms from the student side are what define aid year and aid period. Budgets, packaging, disbursement, and other processes within Financial Aid are all term driven.

The Financial Aid Term and Financial Aid Beginning and Ending Periods are not required by Banner Financial Aid, but may be used by various third-party systems.

The screenshot shows the 'Term Code Validation STVTERM 8.0 (UDCSysT)' window. It displays three rows of term data, each with a grid icon for editing dates. The first row is highlighted in yellow.

Term	Description	Term Start Date	Term End Date	Term Type	Academic Year	Housing Start Date	Housing End Date
NSTM01	Non Standard Term	01-JUN-2007	31-MAY-2008	1	2008	01-JUN-2007	31-MAY-2008
Financial Aid Process Year: 0708 Term: []		Period: [] - []		<input type="checkbox"/> System Required	Activity Date: 07-SEP-2007		
FALL07	Fall 2007	10-SEP-2007	14-DEC-2007	1	2008	10-SEP-2007	14-DEC-2007
Financial Aid Process Year: 0708 Term: []		Period: [] - []		<input type="checkbox"/> System Required	Activity Date: 16-OCT-2007		
DENT78	Dental School 2007-2008	01-AUG-2007	15-JUN-2008	1	2008	01-JUL-2007	01-JUL-2008
Financial Aid Process Year: 0708 Term: []		Period: [] - []		<input type="checkbox"/> System Required	Activity Date: 12-SEP-2007		

Major, Minor Concentration Code Validation Form (STVMAJR)

This form defines the majors that a student can be assigned in the Student System. This form is associated with Financial Aid in that you must determine if a specific major is an aid-eligible major or not for Title IV Funds or funds that you have set up on RFRBASE with a Federal Fund ID of GTIV.

If a student is assigned a major for which the **Financial Aid Eligibility** indicator is not selected, than Banner will not disburse financial aid for this student. An error message will appear in the Financial Aid System indicating that the student is not enrolled in an aid eligible major.

Major Code	Description	CIPC	Major	Minor	Concentration	Occupation	Financial Aid Eligibility	System Required	Voice Response Message Number
0000	Undeclared		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Activity Date: 10-NOV-2004
SEVIS Equivalent: <input type="text"/>									
AA	Administrative Assistant		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Activity Date: 25-OCT-2004
SEVIS Equivalent: <input type="text"/>									
ACCT	Accounting	060201	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Activity Date: 19-JUN-2006
SEVIS Equivalent: <input type="text"/>									
ACQ	Acquisition Management		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Activity Date: 18-JUN-2007
SEVIS Equivalent: <input type="text"/>									
ACTS	Actuarial Science		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Activity Date: 23-FEB-2004
SEVIS Equivalent: <input type="text"/>									

Class Code Validation Form (STVCLAS)

Student System class codes must be translated to Financial Aid class codes so that Banner will certify loan amounts correctly. The federal rules for awarding loan amounts based on class code are hard-coded within Banner.

Class Code	Description	EDI Eqv	LMS Eqv	Activity Date
01	First Year	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
02	Second Year	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
03	Third Year	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
04	Fourth Year	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
11	Year 1, Semester 1	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
12	Year 1, Semester 2	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
21	Year 2, Semester 1	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
22	Year 2, Semester 2	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
CE	Continuing Education	<input type="checkbox"/>	<input type="checkbox"/>	29-APR-1987
FR	Freshman	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
GR	Graduate	<input type="checkbox"/>	<input type="checkbox"/>	29-APR-1987
JR	Junior	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
L1	First Year Law	<input type="checkbox"/>	<input type="checkbox"/>	07-AUG-1987
L2	Second Year Law	<input type="checkbox"/>	<input type="checkbox"/>	07-AUG-1987
L3	Third Year Law	<input type="checkbox"/>	<input type="checkbox"/>	07-AUG-1987
M1	First Year Medical	<input type="checkbox"/>	<input type="checkbox"/>	07-AUG-1987
M2	Second Year Medical	<input type="checkbox"/>	<input type="checkbox"/>	07-AUG-1987
M3	Third Year Medical	<input type="checkbox"/>	<input type="checkbox"/>	07-AUG-1987
PG	Post Graduate Advanced Certif	<input type="checkbox"/>	<input type="checkbox"/>	07-JAN-1991
SO	Sophomore	<input type="checkbox"/>	<input type="checkbox"/>	09-JAN-1995
SP	Special Student	<input type="checkbox"/>	<input type="checkbox"/>	04-MAR-1988
SR	Senior	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
U1	Unit One Students	<input type="checkbox"/>	<input type="checkbox"/>	07-SEP-1999

Class Code Translation Form (RPRCLSS)

The Class Code Translation Form (RPRCLSS) allows you to associate the class code from the student FAFSA record, the Need Analysis Form (RNANAx), with the class code from the Student System, and the Class Code Validation Form (STVCLAS). It is used for loan certification and for Title IV disbursement.

When this form has been completed, the Banner packaging module will accurately award financial aid to a student.

Because the loan creation translates loan eligibility from the class reported on the RNANAx form, schools should verify that the reported classification on RNANAx is correct in order to ensure accurate loan processing.

The screenshot shows a web-based form titled "Class Code Translation RPRCLSS 8.0 (UDCSysT)". At the top, there is a dropdown menu for "Aid Year" currently set to "2007-2008 Aid Year". Below this is a table with four columns: "Student System Level", "Student System Class", "Financial Aid Class", and "Activity Date". Each column contains a series of input fields for data entry. The "Student System Level" and "Student System Class" columns have dropdown menus above their respective input fields. The "Financial Aid Class" column has a dropdown menu above its input fields. The "Activity Date" column has a date input field above its input fields. A vertical scrollbar is visible on the right side of the table.

State/Province Code Validation Form (STVSTAT)

This form is the validation form on which State codes are created. This form is associated with the Identification Form (SPAIDEN), when creating addresses for a General Person record. This form also feeds into the Need Analysis Form (RNANAx) in the event that you wish to change a student's address on this form.

State/Province Code Validation STVSTAT 8.0 (UDCSysT)

Code	Description	EDI Equivalent	IPEDS State Code	Canadian Statistics Code	Activity Date
AB	Alberta			CA	09-NOV-2007
ACT	Australian Capital Territory			AU	09-NOV-2007
AK	Alaska	AK		US	19-NOV-1997
AL	Alabama	AL		US	19-NOV-1997
AN	Co Antrim	AN			09-NOV-2007
AR	Arkansas			US	18-AUG-1987
AUK	Auckland NZ			NZ	09-NOV-2007
AV	Auvergne				09-NOV-2007
AZ	Arizona	AZ		US	19-NOV-1997
BA	Basra				09-NOV-2007
BC	British Columbia			CA	09-NOV-2007
BOP	Bay of Plenty NZ			NZ	09-NOV-2007
CA	California	CA			18-MAR-2008
CAN	Canterbury NZ			NZ	09-NOV-2007
CH	China, People's Republic of	CH		CH	09-NOV-2007
CO	Colorado	CO		US	19-NOV-1997
CT	Connecticut	CT		US	19-NOV-1997
CZ	Canal Zone	CZ			09-NOV-2007
DC	District of Columbia	DC		US	19-NOV-1997
DE	Delaware	DE		US	19-NOV-1997
FL	Florida	FL		US	19-NOV-1997

Level Code Validation Form (STVLEVL)

This form is used to create, delete, update, and insert level codes (i.e., undergraduate, graduate).

Levels have a similar function to that of class codes. The level code is associated with a student's Financial Aid class code. Again, the Packaging module will award financial aid based on a student's level. For example, a student with a level code of *graduate* is not eligible for a Federal Pell Grant. In addition, graduate students receive different amounts of federal loan funding.

Level Code	Description	CEU Indicator	Voice Message	EDI Equivalent	System Required	Activity Date
00	Undeclared	<input type="checkbox"/>			<input checked="" type="checkbox"/>	24-JUN-1991
AP	Apprenticeship	<input type="checkbox"/>			<input type="checkbox"/>	06-APR-2005
BJ	Cooperative Education	<input type="checkbox"/>			<input type="checkbox"/>	21-OCT-2005
CE	Continuing Education	<input checked="" type="checkbox"/>			<input type="checkbox"/>	03-JAN-1995
CR	Credit	<input type="checkbox"/>		UG	<input type="checkbox"/>	14-DEC-2007
DV	Developmental	<input type="checkbox"/>		UG	<input type="checkbox"/>	14-DEC-2007
ED	Employee Development	<input checked="" type="checkbox"/>			<input type="checkbox"/>	13-OCT-2005
EM	Employee	<input type="checkbox"/>			<input type="checkbox"/>	02-SEP-1999
GP	Graduate Professional	<input type="checkbox"/>		GR	<input type="checkbox"/>	14-DEC-2007
GR	Graduate	<input type="checkbox"/>		GR	<input type="checkbox"/>	14-DEC-2007
HS	High School	<input type="checkbox"/>		UG	<input type="checkbox"/>	14-DEC-2007
IB	Int'l Baccalaureate	<input type="checkbox"/>			<input type="checkbox"/>	26-SEP-2006
IN	ESL	<input type="checkbox"/>			<input type="checkbox"/>	03-NOV-2006
JP	Joint Degree Program	<input type="checkbox"/>		UG	<input type="checkbox"/>	14-DEC-2007
LW	Law	<input type="checkbox"/>		LW	<input type="checkbox"/>	14-DEC-2007
MD	Medical Degree	<input type="checkbox"/>		GR	<input type="checkbox"/>	14-DEC-2007
MS	Matriculated Student	<input type="checkbox"/>		UG	<input type="checkbox"/>	14-DEC-2007
NC	Non-Credit	<input type="checkbox"/>			<input type="checkbox"/>	13-MAR-2003
NM	Non-Matriculated Student	<input type="checkbox"/>			<input type="checkbox"/>	01-MAY-1998
PG	Postgraduate	<input type="checkbox"/>		GR	<input type="checkbox"/>	14-DEC-2007
PR	Professional	<input type="checkbox"/>		GR	<input type="checkbox"/>	14-DEC-2007
RE	Regular	<input type="checkbox"/>		UG	<input type="checkbox"/>	14-DEC-2007

Source/ Background Institution Code Validation Form (STVSBGI)

This form is used to create, update, insert, and delete SBGI codes (i.e., higher educational institution codes (ex: American University, Bryant College), high school codes, etc.). These are used for admissions, prior academic history, and for some processing during Financial Aid record creation.

Source or Background Institution	Description	Type	Source Indicator	Admissions Request	Electronic FICE	Voice Response Message Number
			<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"/>			

Check a Student's Enrollment

Introduction

You have awarded a student based on full-time enrollment. You receive word that the student might only be enrolled at a half-time level. The Financial Aid Enrollment Form (ROAENRL), can be used to check the student's enrollment.

You could verify enrollment on the following Financial Aid forms:

- Applicant Status Form (ROASTAT)
- Award Form (RPAAWRD)
- Financial Aid Record Maintenance Form (ROARMAN)
- Packaging Maintenance Form (RPAAPMT).

Each of the above forms has an enrollment block that you can access through the Menu while in the form, which displays the data that you can view on ROAENRL.

Banner form

Financial Aid Enrollment: ROAENRL 8.0 (UDCSyst)

Aid Year: ID:

Term Code	Credit	Financial Aid Hours Bill	Adjusted	Consortium Indicator	Activity Date	User ID	System or Manual
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Attending

Term Code	Credit	Current Hours Bill	Adjusted	Multi Level
<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="checkbox"/>
<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="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Current Attending Schedule

Procedure

Follow these steps to use the form.

1. Access the Financial Aid Enrollment Inquiry Form (ROAENRL).
2. Click **Search** and select a person ID.
3. Perform a **Next Block** function. ROAENRL displays financial aid hours and current hours by term for a student.
4. Review the record.
5. Click **Exit**.

Self Check

Directions

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

Question 1

On the Term Code Validation Form (STVTERM), the term and beginning and ending periods are required by Banner Financial Aid.

True or False

Question 2

The building blocks within Banner are

1. Periods
2. Aid Codes
3. Terms
4. Majors
5. Forms

Question 3

The module in the Financial Aid system that is used to define a fund as disbursable to the Business office is

1. Budgeting
2. Funds Management
3. Requirements Tracking
4. Need Analysis
5. Short-term Credit

Question 4

The form used to set global packaging options is

1. Institutional Options Form – ROAINST
2. Packaging Group Validation Form – RTVPGRP
3. Packaging Group Fund Rules Form – RPRGFND
4. Packaging Options Form – RPROPTS
5. Award Status Validation Form – RTVAWST

Question 5

All of the Student System Shared Data menu forms are

1. Validation forms
2. Rules forms
3. Application forms
4. Process/report
5. Inquiry forms

Question 6

In the Student System Shared Data menu, the letter of the alphabet that is common in all of the forms is

1. an I for Inquiry
2. an A for Application
3. an R for Rules
4. a V for Validation
5. a Q for query

Question 7

What Financial Aid form can you use to verify a student's enrollment?

1. Financial Aid Enrollment Form (ROAENRL)
2. Applicant Status Form (ROASTAT)
3. Basic Student Information Form (RSISTDN)
4. Applicant Requirements Form (RRAAREQ)
5. Award Form (RPAAWRD)

Answer Key for Self Check

Question 1

On the Term Code Validation Form (STVTERM), the term and beginning and ending periods are required by Banner Financial Aid.

False. The Financial Aid Term and Financial Aid Beginning and Ending Periods are not required, but may be used by various third-party systems.

Question 2

What are considered the building blocks within Banner?

1. Periods
2. Aid Codes
- 3. Terms**
4. Majors
5. Forms

Question 3

Which module in the Financial Aid system is used to define a fund as disburseable to the Business office?

1. Budgeting
- 2. Funds Management**
3. Requirements Tracking
4. Need Analysis
5. Short-term Credit

Question 4

Which form is used to set global packaging options?

1. Institutional Options Form – ROAINST
2. Packaging Group Validation Form – RTVPGRP
3. Packaging Group Fund Rules Form – RPRGFND
- 4. Packaging Options Form – RPROPTS**
5. Award Status Validation Form – RTVAWST

Question 5

All of the Student System Shared Data menu forms are:

1. Validation forms
2. Rules forms
3. Application forms
4. Process/report
- 5. Inquiry forms**

Question 6

In the Student System Shared Data menu, the letter of the alphabet that is common in all of the forms is:

- 1. an I for Inquiry**
2. an A for Application
3. an R for Rules
4. a V for Validation
5. a Q for query

Forms accessible through the Student System Shared Data menu are all Inquiry forms, and have the letter I for the third letter in the seven-character form name. This means that you can query the form for information; however, you cannot change or update the data.

Question 7

What Financial Aid form can you use to verify a student's enrollment?

1. **Financial Aid Enrollment Form (ROAENRL)**
2. Applicant Status Form (ROASTAT)
3. Basic Student Information Form (RSISTDN)
4. Applicant Requirements Form (RRAAREQ)
5. Award Form (RPAAWRD)

Day-to-Day Operations



Introduction

The purpose of this section is to explain the day-to-day or operational procedures to run the Student to Financial Interface process at your institution.

Objectives

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

- verify a student's college and degree program and admission status
- check a student's SAT score, enrollment, and housing contract
- view a list of students receiving a third-party benefit
- query high school data
- confirm tuition information
- compare prior schools on NSLDS to schools attended per Admissions.

Verify a Student's College and Degree Program

Exercises

In the remaining lessons, you will be presented with exercises where you will need to assess a situation and determine which forms to use in the Student System Shared Data menu. The goal of these exercises is to become familiar with information that is available via the Student System Shared Data menu.

Banner form

Your enterprise uses a different cost of attendance for students who are admitted to the School of Architecture. This is a very selective program. Many students apply for admission, but only a limited number are chosen. In addition to higher tuition cost, the allowance for books and supplies is also higher. A student has stated that he has been admitted to the School of Architecture; however, the Financial Aid cost of attendance is that of a traditional student.

The Basic Student Information Inquiry Form (RSISTDN) allows you to view a student's College, Degree and Major, as well as non-course related information.

Basic Student Information Inquiry RSISTDN 8.0 (UDCSysT)

ID:

Campus:	<input type="text"/>	History Standing:	<input type="text"/>
Level:	<input type="text"/>	Term:	<input type="text"/>
Status:	<input type="text"/>	Override Standing:	<input type="text"/>
Type:	<input type="text"/>	Term:	<input type="text"/>
Beginning Effective Term:	<input type="text"/>	Residency:	<input type="text"/>
Ending Effective Term:	<input type="text"/>		
Expected Graduation Date:	<input type="text"/>		

Primary Curriculum		Secondary Curriculum	
Degree:	<input type="text"/>	Degree:	<input type="text"/>
College:	<input type="text"/>	College:	<input type="text"/>
Major 1:	<input type="text"/>	Major 1:	<input type="text"/>
Major 2:	<input type="text"/>	Major 2:	<input type="text"/>
Minor 1:	<input type="text"/>	Minor 1:	<input type="text"/>
Minor 2:	<input type="text"/>	Minor 2:	<input type="text"/>
Concentration 1:	<input type="text"/>	Concentration 1:	<input type="text"/>
Concentration 2:	<input type="text"/>	Concentration 2:	<input type="text"/>

Procedure

Follow these steps to complete the process.

1. Access the Basic Student Information Inquiry Form (RSISTDN).
2. Click **Search** and select a person ID.
3. Perform a **Next Block** function.
4. Use the scrollbar to view any additional records entered for the selected student.
5. Click **Exit**.

Check a Student's SAT Score

Banner form

Your enterprise has a ranking system used to determine levels of institutional financial aid. Your system is comprised mainly of SAT scores and High School GPAs. A student questioning the amount of institutional aid he has received claims that his SAT score is much higher than his rank indicates.

For this lesson, you will use the Test Score Inquiry Form (RSITEST), since it displays a student's test history.

Test Code	Score	Source	Administration Type	Date Taken
<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="checkbox"/>	<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="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

Procedure

Follow these steps to complete the process.

1. Access the Test Score Inquiry Form (RSITEST).
2. Click **Search** and select a person ID.
3. Perform a **Next Block** function.
4. Use the scrollbar to view any additional records entered for the selected student.
5. Click **Exit**.

Check On a Student's Housing Contract

Banner form

You have awarded a student based on her being an on-campus resident. She notifies your office that she is moving off campus for the spring semester. Your enterprise has very strict rules about allowing a student to break his/her housing contract. You want to determine whether or not the Housing office has allowed her to move off campus.

The Housing Information Inquiry Form (RSIHOUS) displays information that pertains to a student's dormitory room assignment, any special attributes for the room, and meal plan assignments.

Housing Information Inquiry RSIHOUS 8.0 (UDCSysT)

ID:

Room Assignments

Term: Start: End: Status: Building: Room:

Phone: () Assessed: Rate: Days: Months: Terms:

Special Attributes

Term	Code	Must Match
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Meal Assignments

Term: Start: End: Status: Plan: Days:

Months: Terms: Assessed:

Procedure

Follow these steps to complete the procedure.

1. Access the Housing Information Inquiry Form (RSIHOUS).
2. Click **Search** and select a person ID.
3. Perform a **Next Block** function.
4. Review the record.

Note: The Special Attributes block is a view-only section.

5. Click **Exit**.

Procedure

Follow these steps to complete the process.

1. Access the Third Party Contract Inquiry Form (RSICONT).
2. Click **Search** and select an existing Contract ID.
3. Enter a term in the **Term Code** field.
4. Enter a contract number in the **Contract No.** field.
5. Perform a **Next Block** function.
6. Review the record.

Note: A *D* in the **Delete** field indicates that the person is no longer authorized for the contract.

7. Click **Exit**.

Query High School Data

Banner form

A student's parents are divorced. The father lives in your state and the mother lives in a different state. The student is applying for in-state residency, and you are trying to gather some more information. You want to determine which parent the student has been living with. One method to find this information is by checking their high school record.

High School Inquiry RSIHSCH 8.0 (UDCSysT)

ID:

High School:

Address:

City:

Zip or Postal Code:

State or Province:

Country:

Graduation Date:

GPA:

Class Rank:

Class Size:

Percentile:

College Preparation:

Diploma:

Procedure

Follow these steps to complete the procedure.

1. Access the High School Inquiry Form (RSIHSCH).
2. Click **Search** and select a person ID.
3. Perform a **Next Block** function.
4. Review the record.
5. Click **Exit**.

Procedure

Follow these steps to complete the process.

1. Access the Account Detail Review Inquiry Form (RSIAREV).
2. Click **Search** and select a person ID.
3. Perform a **Next Block** function.
4. Review this form.

Note: All fields in the Account Detail block are display-only fields and display charges and payments to an account. All activity for this account appears within this section. The effective date of the charge or payment determines the current amount due. The form does not use charges or payments with an effective date greater than today in the calculation. Charges and payments created in other modules are indicated by the source.

The balance of the account and the current amount due are calculated and displayed in the Account Summary block. Any changes to the account information will modify these balances. The **Query Balance** is the sum of all charges and payments queried and displayed to date. The **Acct Balance** is the sum of all charges and payments. The **Amount Due** is the sum of all charges and payments with an effective date less than or equal to the current date, plus the sum of any memo charges and payments recorded for the account.

You may query for detail code, term, or source on this form.

5. Click **Exit**.

Verify a Student's Admission Status

Banner form

The family of an incoming student is very anxious to see what her financial aid awards are going to be. It is the policy of your enterprise not to award financial aid to a student until he/she has been admitted. Financial Aid has created a tracking requirement called *Admit Status*, which shows that the student has not yet been admitted. The family insists that the student has been admitted.

The Admissions Application Inquiry Form (RSIAPPL) allows you to review a student's admissions application-related information.

Admissions Application Inquiry RSIAPPL 8.0 (UDCSyst)

ID:

Entry Term: <input type="text"/>	Primary Curriculum
Application Number: <input type="text"/>	Degree: <input type="text"/> <input type="text"/>
Application Date: <input type="text"/>	College: <input type="text"/> <input type="text"/>
Campus: <input type="text"/> <input type="text"/>	Major: <input type="text"/> <input type="text"/>
Site: <input type="text"/> <input type="text"/>	
Date: <input type="text"/>	Secondary Curriculum
Level: <input type="text"/> <input type="text"/>	Degree: <input type="text"/> <input type="text"/>
Student Type: <input type="text"/>	College: <input type="text"/> <input type="text"/>
Residency: <input type="text"/>	Major: <input type="text"/> <input type="text"/>
Admission Type: <input type="text"/>	
Application Status: <input type="text"/>	
Application Decision: <input type="text"/>	
Student Acceptance: <input type="checkbox"/>	
Significant Decision: <input type="checkbox"/>	
Institution Acceptance: <input type="checkbox"/>	
Application Inactive: <input type="checkbox"/>	

Procedure

Follow these steps to complete the procedure.

1. Access the Admissions Application Inquiry Form (RSIAPPL).
2. Click **Search** and select a person ID.
3. Perform a **Next Block** function.
4. Review this form.
5. Click **Exit**.

Compare Prior Schools on NSLDS to Schools Attended per Admissions

Banner form

You have received NSLDS Data that indicates a student has attended at least one other school that he/she hasn't told you about. You want to determine if any other schools of prior attendance are identified in the Banner System.

The Prior College Inquiry Form (RSIPCOL) allows you to query for information on the student's previous attendance at other institutions that have been recorded by your Admissions Office. RSIPCOL and RNASLxx serve as cross-references regarding institutions previously attended by the student.

Prior College Inquiry RSIPCOL 8.0 (UDCSysT)

ID:

College Code:

Address:

City:

State or Province:

Zip or Postal Code:

Country:

Level:

Attend Period:

Attend From:

Attend To:

Degree Code:

Procedure

Follow these steps to complete the procedure.

1. Access the Prior College Inquiry Form (RSIPCOL).
2. Click **Search** and select a person ID.
3. Perform a **Next Block** function.
4. Review this form.

Note: The data displays in College Code sequence.

5. Click **Exit**.

Self Check

Directions

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

Question 1

The form on the Student System Shared Data menu that you would use to verify a student's college and degree program is

1. Basic Student Information Inquiry Form (RSISTDN)
2. Test Score Inquiry Form (RSITEST)
3. High School Inquiry Form (RSIHSCH)
4. Degrees and Other Formal Awards Inquiry Form (RSIDEGR)
5. Housing Inquiry Form (RSIHOUS)

Question 2

The form in the previous question allows you to edit and update the data for a student's record.

True or False

Question 3

The form you would call upon to check a student's SAT score is

1. Basic Student Information Inquiry Form (RSISTDN)
2. Test Score Inquiry Form (RSITEST)
3. High School Inquiry Form (RSIHSCH)
4. Degrees and Other Formal Awards Inquiry Form (RSIDEGR)
5. Housing Inquiry Form (RSIHOUS)

Question 4

The Test Score Inquiry Form (RSITEST) is comprised of

1. A student's College, Degree and Major, as well as non-course related information.
2. Information that pertains to a student's dormitory room assignment, any special attributes for the room, and meal plan assignments.
3. Test scores, SAT or ACT scores, and high school GPAs, as well as the date the test were taken.
4. Information on the student's previous attendance at other institutions that have been recorded by your Admissions Office.
5. A student's admissions application-related information.

Question 5

The form on the Student System Shared Data menu that you would query to check on a student's housing contract is

1. Basic Student Information Inquiry Form (RSISTDN).
2. Test Score Inquiry Form (RSITEST).
3. High School Inquiry Form (RSIHSCH).
4. Degrees and Other Formal Awards Inquiry Form (RSIDEGR).
5. Housing Inquiry From (RSIHOUS).

Question 6

When you are reviewing the Housing Inquiry Form (RSIHOUS) the fields in particular that you would want to review are in the

1. Primary Curriculum block, paying close attention to degree and major fields.
2. Account Detail block paying close attention to detail code, charge, and payment fields.
3. Key block paying close attention to admission decision and entry term fields.
4. Room Assignment block, paying close attention to term, start, end, and status fields.
5. Key block paying close attention to high school and GPA.

Question 7

The form on the Student System Shared Data menu that you would query to view a list of all students who are receiving a third party benefit?

1. Basic Student Information Inquiry Form (RSISTDN).
2. Test Score Inquiry Form (RSITEST).
3. High School Inquiry Form (RSIHSCH).
4. Degrees and Other Formal Awards Inquiry Form (RSIDEGR).
5. Third Party Contract Inquiry Form (RSICONT).

Question 8

The three fields in the key block of the Third Party Contract Inquiry Form (RSICONT) that must be entered to display third part contract information are

1. Term, Contract ID, and GPA
2. Term, Contract ID, and detail code
3. Term, Contract ID, and Contract number
4. Term, aid year, and Contract ID
5. Term, aid year, and Contract number

Question 9

The Financial Aid form that allows you to interface with the Accounts Receivable Third Party Contracts information is

1. Institutional Options Form (ROAINST)
2. INAS Global Policy Options Rules Form (RNRGLxx)
3. Fund management Form (RFRMGMT)
4. Financial Aid Enrollment Form (ROAENRL)
5. Packaging Options Form (RPROPTS)

Question 10

The form on the Student System Shared Data menu that you would query to determine what high school the student graduated from or their overall GPA is

1. Basic Student Information Inquiry Form (RSISTDN)
2. Test Score Inquiry Form (RSITEST)
3. High School Inquiry Form (RSIHSCH)
4. Degrees and Other Formal Awards Inquiry Form (RSIDEGR)
5. Third Party Contract Inquiry Form (RSICONT)

Question 11

The form you would query to determine what your student is being charged for tuition is

1. Basic Student Information Inquiry Form (RSISTDN)
2. Award Form (RPAAWRD)
3. High School Inquiry Form (RSIHSCH)
4. Account Detail Review Inquiry Form (RSIAREV)
5. Third Party Contract Inquiry Form (RSICONT)

Question 12

All fields in the Account Detail section of the Account Detail Review Inquiry Form are display-only fields and display charges and payments to an account.

True or False

Question 13

The form you would query to verify the student's admission status is

1. Basic Student Information Inquiry Form (RSISTDN)
2. Admissions Application Inquiry Form (RSIAPPL)
3. High School Inquiry Form (RSIHSCH)
4. Basic Student Information Inquiry Form (RNISTDN)
5. Admissions Application Inquiry Form (RNIAPPL)

Question 14

The information you can find on the Admissions Application Inquiry Form (RSIAPPL) is

1. Admission type, status, decision, entry term, level, degree, college, and major
2. Admission type, status, decision, entry term, level, degree, college, major, and prior colleges
3. Admission type, status, decision, entry term, level, degree, college, major, and aid year
4. Admission type, status, decision, entry term, level, degree, college, major, contract number
5. Admission type, status, decision, entry term, level, degree, college, major, and tuition charges

Question 15

The form you would query for information from other enterprises that your Admissions Office has recorded is

1. Basic Student Information Inquiry Form (RSISTDN)
2. Test Score Inquiry Form (RSITEST)
3. High School Inquiry Form (RSIHSCH)
4. Degrees and Other Formal Awards Inquiry Form (RSIDEGR)
5. Prior College Inquiry Form (RSIPCOL)

Question 16

Prior colleges are listed in the order of

1. Term
2. Aid year
3. College code sequence
4. Major
5. Class code sequence

Answer Key for Self Check

Question 1

What form on the Student System Shared Data menu would you use to verify a student's college and degree program?

1. **Basic Student Information Inquiry Form (RSISTDN)**
2. Test Score Inquiry Form (RSITEST)
3. High School Inquiry Form (RSIHSCH)
4. Degrees and Other Formal Awards Inquiry Form (RSIDEGR)
5. Housing Inquiry Form (RSIHOUS)

Query the Basic Student Information Inquiry Form (RSISTDN). The Primary Curriculum block displays a student's College, Degree, and Major.

Question 2

The form in the previous question allows you to edit and update the data for a student's record.

False. This is an Inquiry form, which means that you can query the form for information, but you cannot change or update the data.

Question 3

What form would you call upon to check a student's SAT score?

1. Basic Student Information Inquiry Form (RSISTDN)
- 2. Test Score Inquiry Form (RSITEST)**
3. High School Inquiry Form (RSIHSCH)
4. Degrees and Other Formal Awards Inquiry Form (RSIDEGR)
5. Housing Inquiry Form (RSIHOUS)

Query the Test Score Inquiry Form (RSITEST). This form will display the Test Code, Description, Score, and Source along with other information.

Question 4

What information can be found on the form in the previous question?

1. A student's College, Degree and Major, as well as non-course related information.
2. Information that pertains to a student's dormitory room assignment, any special attributes for the room, and meal plan assignments.
- 3. Test scores, SAT or ACT scores, and high school GPAs, as well as the date the test were taken.**
4. Information on the student's previous attendance at other institutions that have been recorded by your Admissions Office.
5. A student's admissions application-related information.

Question 5

What form on the Student System Shared Data menu would you query to check on a student's housing contract?

1. Basic Student Information Inquiry Form (RSISTDN).
2. Test Score Inquiry Form (RSITEST).
3. High School Inquiry Form (RSIHSCH).
4. Degrees and Other Formal Awards Inquiry Form (RSIDEGR).
5. **Housing Inquiry Form (RSIHOUS).**

Question 6

What fields in particular would you want to review?

1. Primary Curriculum block, paying close attention to degree and major fields.
2. Account Detail block paying close attention to detail code, charge, and payment fields.
3. Key block paying close attention to admission decision and entry term fields.
4. **Room Assignment block, paying close attention to term, start, end, and status fields.**
5. Key block paying close attention to high school and GPA.

Question 7

What form on the Student System Shared Data menu would you query to view a list of all students who are receiving a third party benefit?

1. Basic Student Information Inquiry Form (RSISTDN).
2. Test Score Inquiry Form (RSITEST).
3. High School Inquiry Form (RSIHSCH).
4. Degrees and Other Formal Awards Inquiry Form (RSIDEGR).
5. **Third Party Contract Inquiry Form (RSICONT).**

Question 8

Which three fields in the key block must be entered to display third party contract information?

1. Term, Contract ID, and GPA
2. Term, Contract ID, and detail code
3. **Term, Contract ID, and Contract number**
4. Term, aid year, and Contract ID
5. Term, aid year, and Contract number

Question 9

What Financial Aid form allows you to interface with the Accounts Receivable Third Party Contracts information?

1. Institutional Options Form (ROAINST)
2. INAS Global Policy Options Rules Form (RNRGLxx)
3. Fund management Form (RFRMGMT)
4. Financial Aid Enrollment Form (ROAENRL)
5. **Packaging Options Form (RPROPTS)**

Question 10

Which form on the Student System Shared Data menu would you query to determine what high school the student graduated from, and/or what their overall GPA is?

1. Basic Student Information Inquiry Form (RSISTDN)
2. Test Score Inquiry Form (RSITEST)
- 3. High School Inquiry Form (RSIHSCH)**
4. Degrees and Other Formal Awards Inquiry Form (RSIDEGR)
5. Third Party Contract Inquiry Form (RSICONT)

Question 11

What form would you query to determine what your student is being charged for tuition?

1. Basic Student Information Inquiry Form (RSISTDN)
2. Award Form (RPAAWRD)
3. High School Inquiry Form (RSIHSCH)
- 4. Account Detail Review Inquiry Form (RSIAREV)**
5. Third Party Contract Inquiry Form (RSICONT)

Question 12

All fields in the Account Detail section of the form in Question 20 are display-only fields and display charges and payments to an account.

True

Question 13

What form would you query to verify the student's admission status?

1. Basic Student Information Inquiry Form (RSISTDN)
- 2. Admissions Application Inquiry Form (RSIAPPL)**
3. High School Inquiry Form (RSIHSCH)
4. Basic Student Information Inquiry Form (RNISTDN)
5. Admissions Application Inquiry Form (RNIAPPL)

Question 14

What other valuable information can you find on this form?

- 1. Admission type, status, decision, entry term, level, degree, college, and major**
2. Admission type, status, decision, entry term, level, degree, college, major, and prior colleges
3. Admission type, status, decision, entry term, level, degree, college, major, and aid year
4. Admission type, status, decision, entry term, level, degree, college, major, contract number
5. Admission type, status, decision, entry term, level, degree, college, major, and tuition charges

Question 15

What form would you query for information from other enterprises that your Admissions Office has recorded?

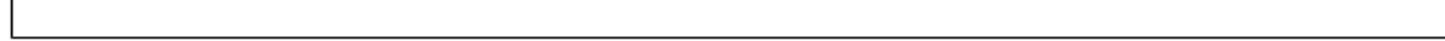
1. Basic Student Information Inquiry Form (RSISTDN)
2. Test Score Inquiry Form (RSITEST)
3. High School Inquiry Form (RSIHSCH)
4. Degrees and Other Formal Awards Inquiry Form (RSIDEGR)
- 5. Prior College Inquiry Form (RSIPCOL)**

Question 16

In what order are prior colleges listed?

1. Term
2. Aid year
- 3. College code sequence**
4. Major
5. Class code sequence

Appendix



Forms Job Aid

Form	Full Name	Use this Form to...
RCRSUSP	Suspended Records Maintenance	
RCRTPTR	Interface Data Translation Rules	
RFRBASE	Fund Base Data	
RFRMGMT	Funds Management	
RNANAx	Need Analysis	
ROAENRL	Financial Aid Enrollment Inquiry	
ROAINST	Institution Financial Aid Options	
ROARMAN	Financial Aid Record Maintenance	
ROASTAT	Applicant Status	
RORTPRD	Aid Period/Term Rules	
RPAAPMT	Packaging Maintenance	
RPAAWRD	Award	
RPRCLSS	Class Code Translation Rules	
RPRCONT	Third Party Contract Rules	

Form	Full Name	Use this Form to...
RPREXPT	Exemption Rules	
RPROPTS	Packaging Options	
RSIAPPL	Admissions Application Inquiry	
RSIAREV	Account Detail Review Inquiry	
RSICONT	Third Party Contract Inquiry	
RSIDEGR	Degrees and Other Formal Awards Inquiry	
RSIEXPT	Billing Exemption Inquiry	
RSIHIST	Summary Academic History Inquiry	
RSIHOUS	Housing Information Inquiry	
SPAIDEN	Identification	
STVACYR	Academic Year Validation	
STVAPDC	Admission Application Decision Code Validation	