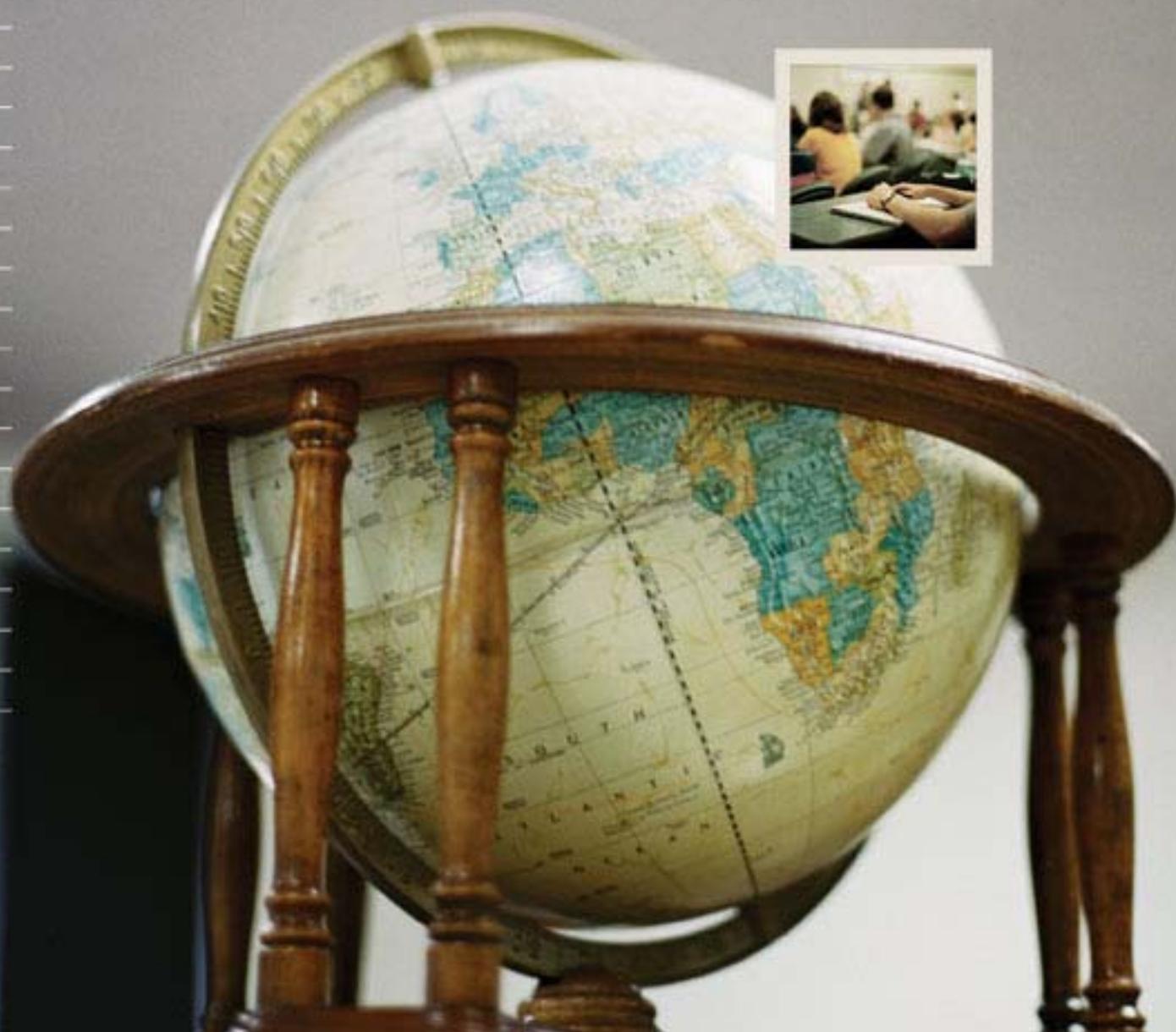


SCT Banner
Financial Aid
Budgeting Training Workbook

*Release 7.2
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Section A: Introduction

Overview

Workbook goal The goal of this workbook is to provide you with the knowledge and practice to accurately calculate and assign cost of attendance values to applicants based on budget types using the various functions in the SCT Banner Budgeting module. This workbook is divided into four sections:

- Introduction
- Set Up
- Day-to-day operations
- Reference

Intended audience Financial Aid office administrators and staff

In this section These topics are covered in this section.

Topic	Page
Process Introduction	A-2

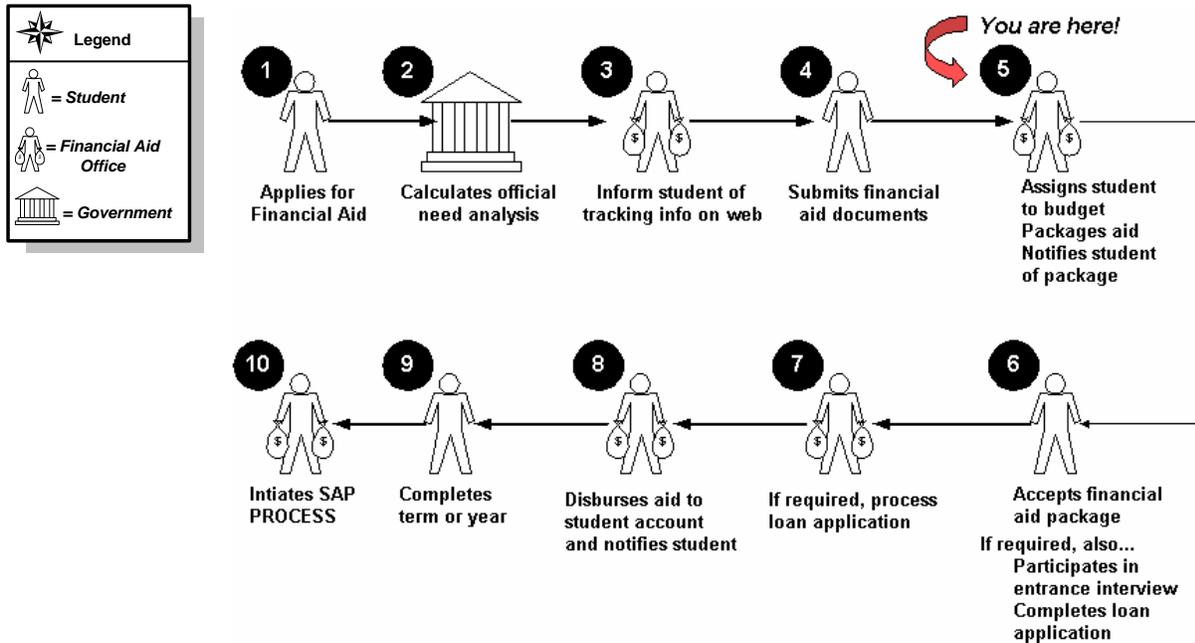
Process Introduction

Introduction

Applicant budgets reflect the approximate costs that an applicant is expected to incur while attending the institution. These costs are different for different categories of students; for example, on-campus versus off-campus, graduate versus undergraduate. An individual applicant can have at most two different budgets, one for Pell Grants and a second for non-Pell programs.

Flow diagram

This diagram highlights where the budgeting process occurs within the overall Financial Aid process.



Continued on the next page

Process Introduction, Continued

What happens

The stages of the process are described in this table.

Stage	Description
1	Student applies for financial aid.
2	Government calculates official need analysis
3	FAO informs student of tracking information on the web.
4	Student submits financial aid documents.
5	FAO assigns student to budget Packages aid and notifies student of package.
6	Student accepts financial aid package.
7	FAO processes loan application.
8	FAO disburses aid to student account and notifies student.
9	Student completes term of year.
10	FAO initiates SAP process.

Section B: Set Up

Overview

Introduction	<p>The Budgeting module calculates and assigns cost of attendance values to each applicant based on budget components in effect at the institution (e.g., tuition, fees, room and board, etc.) This module provides these features:</p> <ul style="list-style-type: none">• Budget Component Assignment – assigns a pre-defined set of budget categories (components) and values to students according to their budget group.• Mixed Enrollment – creates a budget that is a weighted average of two or more budgets. This is useful for a student who is on-campus for half a year and off-campus for the other half.• Multiple Budgets – based on user-defined rules, a student can be assigned a Pell budget plus one additional budget.• Transaction Log – maintains an online log of all budget and budget group changes.
Intended audience	<p>Financial Aid Office Administrators.</p>
Objectives	<p>At the end of this section, you will be able to</p> <ul style="list-style-type: none">• create budget components, component amounts, budget groups, and budget types• define aid periods• establish valid budget types by budget groups• establish valid budget components by budget groups, budget type, and aid period combinations• define budget group assignment rules for each budget group established.
Prerequisites	<p>To complete this section, you should have</p> <ul style="list-style-type: none">• completed the SCT Education Practices computer-based training (CBT) tutorial “SCT Banner 7 Fundamentals,” or have equivalent experience navigating in the SCT Banner system• completed the Financial Aid Overview training workbook• a minimum working knowledge of SQL for building rules• administrative rights to create the rules and set the validation codes in SCT Banner.

Continued on the next page

Overview, Continued

In this section

These topics are covered in this section. These forms are used to set the rules and parameters in SCT Banner for handling applicant budgeting.

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Menu structure

- 📁 **Financial Aid [*RESOURCE]**
 - 📁 **Applicant Processing [*RESAPPL]**
 - 📁 **Need Analysis [*RESNEED]**
 - 📁 **Requirements Tracking [*RESTRACK]**
 - 📁 **Budgeting [*RESBUDG]**
 - 📄 **Applicant Budget [RBAABUD]**
 - 📄 **Financial Aid Record Maintenance [ROARMAN]**
 - 📄 **Applicant Comments [RHACOMM]**
 - 📄 **Applicant Immediate Process [ROAIMMP]**
 - 📁 **Budgeting Control [*RESBUDGCM]**

Aid Period Validation Form

Introduction

The Aid Period Validation Form (RTVAPRD) is used to maintain valid aid periods, descriptions of each period, percent of full academic year costs assigned for budgets for this aid period, the percentage of the student's annual Pell award that may be awarded for this aid period, the Expected Family Contribution (EFC) percentage for the period, and the activity date of the maintenance.

Banner form

Code	Description	Budget Full Year Percent	Pell Full Year Percent	EFC Percent	Activity Date
FA/SPR	Fall-Spring Semesters	100	100	100	03-JAN-1995
FA/SU1	Fall-Summer1	75	100	75	16-AUG-2004
FA/SU2	Fall-Summer2	75	75	75	03-JAN-1995
FALL	Fall Semester	50	50	50	03-JAN-1995
FAS1S2	Fall-Summer1-Summer2	99.999	100	99.999	15-JAN-1995
FSS1S2	Fall-Spring-Summer1-Summer2	150	100	150	03-JAN-1995
FSSU1	Fall-Spring-Summer1	125	100	125	03-JAN-1995
FSSU2	Fall-Spring-Summer2	125	100	125	03-JAN-1995
FWS	Fall, Winter, Spring	99.999	100	100	09-AUG-2004
FWSS	Fall Winter Spring Summer equa	99.999	100	100	09-AUG-2004
FWSSU1	Fall, Win, Spr, Sum > Full Yr	133	100	133	09-AUG-2004
HAL	Hals aid period	33.334	33.334	33.334	29-JUL-2004
SPRING	Spring Semester	50	50	50	03-JAN-1995
SPS1S2	Spring-Summer1-Summer2	99.999	100	99.999	03-JAN-1995
SPSU1	Spring-Summer1	75	75	75	03-JAN-1995
SPSU2	Spring-Summer2	75	75	75	03-JAN-1995
SPSUM	Spring - Summer	87	100	100	29-JUN-2004
SU1SU2	Summer1-Summer2	50	50	50	03-JAN-1995
SUE1	Sue fall/spring	99.999	100	100	20-MAY-2004
SUMMR1	Summer 1 Semester	25	25	25	03-JAN-1995
SUMMR2	Summer 2 Semester	25	25	25	03-JAN-1995

Continued on the next page

Aid Period Validation Form, Continued

Procedure

Follow the steps to create a cost of attendance budget for each of the various groups of students who attend your institution.

Step	Action
1	Access the Aid Period Validation Form (RTVAPRD).
2	Perform an Insert Record function.
3	Enter a unique aid period code in the Code field. <u>Note:</u> Maximum of six characters. <i>Example:</i> You can enter <u>FA/SPR</u> , which indicates an aid period of fall-spring semesters.
4	Enter a brief description of your aid period in the Description field.
5	Enter the percentage of the aid year that this aid period represents in the Full Year Percent field. <i>Example:</i> Fall Only = 50% or Fall/Spring = 100%. <u>Note:</u> SCT Banner only allows one aid period in this column to equal 100 percent. All other aid periods must be a variation of 100 percent, either higher or lower. Enter 99.999 percent when an additional aid period should equal 100 percent.
6	Enter the percentage of the annual scheduled Pell Grant that a student may be awarded for this aid period in the Pell Full Year Percent field. <u>Note:</u> Each percentage entered may not exceed 100 percent, but you may have more than one entry of 100 percent in this column.
7	Enter the percentage of the effective family contribution (EFC) calculation that you wish to associate with this aid period in the EFC Percent field. <u>Note:</u> This field is used only when the Use EFC Proration box on ROAINST is checked.
8	Click the Save icon.
9	Click the Exit icon.

Aid Period/Term Rules Form, Continued

Procedure, continued

Step	Action
6	Repeat for each term that should be associated with the aid period. <i>Example:</i> The Fall/Spring aid period needs a Fall term code and a Spring term code.
7	Click the Save icon.
8	Click the Exit icon.

Budget Component Validation Form

Introduction

The Budget Component Validation Form (RTVCOMP) enables you to define and maintain standard budget component codes. These budget component codes represent items that you frequently encounter when you estimate a student's cost of education (cost of attendance).

Banner form

Component Code	Description	Default	Print Order	Used for Alt Pell	Used for <1/2 Pell	Activity Date
T+F	Tuition and Fees	<input checked="" type="checkbox"/>	10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	05-AUG-2004
R+B	Room and Board	<input checked="" type="checkbox"/>	20	<input type="checkbox"/>	<input type="checkbox"/>	05-AUG-2004
B+S	Books and Supplies	<input checked="" type="checkbox"/>	30	<input checked="" type="checkbox"/>	<input type="checkbox"/>	15-JUN-2004
PERS	Personal Expenses	<input checked="" type="checkbox"/>	50	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
TRAN	Transportation	<input checked="" type="checkbox"/>	60	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
CHLD	Child Care Expenses	<input type="checkbox"/>	70	<input type="checkbox"/>	<input checked="" type="checkbox"/>	15-JUN-2004
STFE	Stafford Fees	<input type="checkbox"/>	75	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
RESF	Resident Dorm Fee	<input type="checkbox"/>	80	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
O/S	Non resident fee	<input type="checkbox"/>	90	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
FEES	Fees	<input type="checkbox"/>	110	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
COMP	Computer Fees	<input type="checkbox"/>	120	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
MED	Medical	<input type="checkbox"/>	130	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
MISC	Miscellaneous	<input type="checkbox"/>	140	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
WILL	Will's Test Fee	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	15-APR-2004
WWW	Test of field size	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	15-APR-2004
		<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"/>	

Procedure

Follow the steps to build standard components to be used in constructing cost of attendance budgets.

Step	Action
1	Access the Budget Component Validation Form (RTVCOMP).
2	Enter a unique code in the Component Code field.
3	Enter a brief description for the new component in the Description field.
4	Click the Default checkbox if you want the system to automatically copy the component into each budget that you define.
5	Enter a numerical value (1- 999) in the Print Order field to establish the print order.

Continued on the next page

Budget Component Validation Form, Continued

Procedure, continued

Step	Action
6	<p>Click the Used for Alt Pell checkbox for each component to be used to calculate an alternate Pell Grant budget automatically for the student. This is appropriate only for those schools that meet Alternate Pell cost guidelines.</p> <p><u>Result:</u> The student's calculated Alternate Pell Budget total displays on the Applicant Pell Grant form (ROAPELL).</p>
7	<p>Click the Used for <1/2 Pell checkbox for each component to be used to calculate a less-than-half-time Pell Grant budget automatically for the student.</p> <p><u>Result:</u> When the Used for <1/2 Pell field is checked, Banner sums the total of those components that are in the student's assigned Pell budget. The calculated <1/2 Pell budget total for the student displays on the Applicant Pell Grant Form (ROAPELL).</p>
8	Click the Save icon.
9	Click the Exit icon.

Budget Group Validation Form

Introduction

The Budget Group Validation Form (RTVBGRP) enables you to create and maintain standard budget group codes. These budgeting groups allow you to categorize students with similar budgeting considerations into the same designated groups.

Banner form

Budget Group Validation RTVBGRP 7.0 (s7c70)

Group Code	Group Description	Priority	Activity Date
CODFP	COD FP Budget Group	2	06-APR-2004
UGINHM	Undergrad Resident At Home	5	04-JAN-1995
UGINOF	Undergrad Resident Off Campus	10	04-JAN-1995
UGINON	Undergrad Resident On Campus	15	04-JAN-1995
UGOSHM	Undergrad Non-res At Home	20	04-JAN-1995
UGOSOF	Undergrad Non-res Off Campus	25	04-JAN-1995
UGOSON	Undergrad Non-res On Campus	30	04-JAN-1995
GRINHM	Graduate Resident At Home	35	04-JAN-1995
GRINOF	Graduate Resident Off Campus	40	04-JAN-1995
GRINON	Graduate Resident On Campus	45	04-JAN-1995
GROSHM	Graduate Non-res At Home	50	04-JAN-1995
GROSOF	Graduate Non-res Off Campus	55	04-JAN-1995
GROSON	Graduate Non-res On Campus	60	04-JAN-1995
DEFAULT	Budgeting Default Group	300	04-JAN-1995
WWWWW	To test display of coded field	301	17-MAR-2004
AAA	Kathy's for testing	302	25-MAR-2004
DEB	Deb's Budget Group	999	18-AUG-2004

Procedure

Follow the steps to establish standard budget group codes.

Step	Action
1	Access the Budget Group Validation Form (RTVBGRP).
2	Enter a budget group code in the Group Code field.
3	Enter a brief description of the budget group code in the Group Description field.
4	Enter a numerical value (1-999) as the budget group priority in the Priority field.
5	Click the Save icon.
6	Click the Exit icon.

Financial Aid Selection Rules Form

Introduction

The Financial Aid Selection Rules Form (RORRULE) enables you to write rules for group selection, fund management, and satisfactory academic progress based on the rule type that you enter.

Banner form

The screenshot shows the 'Financial Aid Selection Rules: RORRULE 7.1 (s7c70)' window. At the top, the 'Rule Type' is set to 'Budget Group Assignment'. Below it, the 'Aid Year' is '0405' (2004-2005 Financial Aid Year) and the 'Group Code' is 'UGINHM' (Undergrad Resident At Home). The 'Fund Code' field is empty. The main section is titled 'Selection Criteria' and contains a list of criteria: 'rcrapp1_inst_hous_cde in ('1','4') and', 'rcrapp1_stat_code_res = 'PA' and', '(rcrapp1_yr_in_coll in ('1','2','3','4','5','6') or', 'rcrapp1_yr_in_coll is null) and', and 'rcrapp1_curr_rec_ind = ^Y'. A 'Copy To' button is located at the bottom left of the criteria list.

Procedure

Follow these steps to write a budget grouping rule.

Step	Action
1	Access the Financial Aid Selection Rules Form (RORRULE).
2	Select <i>Budget Group Assignment</i> from the drop-down menu in the Rule Type field.
3	Enter the code in the Aid Year field for the aid year you are defining or select it from the list of values (LOV).
4	Enter the group code in the Group Code field you defined in the Budget Group/Type Rules Form procedure or select it from the LOV. <u>Note:</u> Do not enter a fund code.
5	Perform a Next Block function.

Continued on the next page

Financial Aid Selection Rules Form, Continued

Procedure, continued

Step	Action
6	<p>Enter one of the selection criteria below to define your budget group.</p> <p><u>Sample rules:</u></p> <p>Undergraduate Living with Parents: (RCRAPP1_YR_IN_COLL BETWEEN '1' AND '5' OR RCRAPP1_YR_IN_COLL IS NULL) AND (RCRAPP1_INST_HOUS_CDE = '1' OR RCRAPP1_INST_HOUS_CDE IS NULL) AND RCRAPP1_CURR_REC_IND = 'Y'</p> <p>OR</p> <p>Graduate Living in an Apartment: RCRAPP1_YR_IN_COLL > '5' AND RCRAPP1_INST_HOUS_CDE = '3' AND RCRAPP1_CURR_REC_IND = 'Y'</p>
7	Click the Save icon.
8	Click the Exit icon.

Budget Component Rules Form, Continued

Procedure, continued

Step	Action
9	Complete the fields in the Copy To block to copy existing budget data to another group/aid perdio/type as needed.
10	Click the Exit icon.

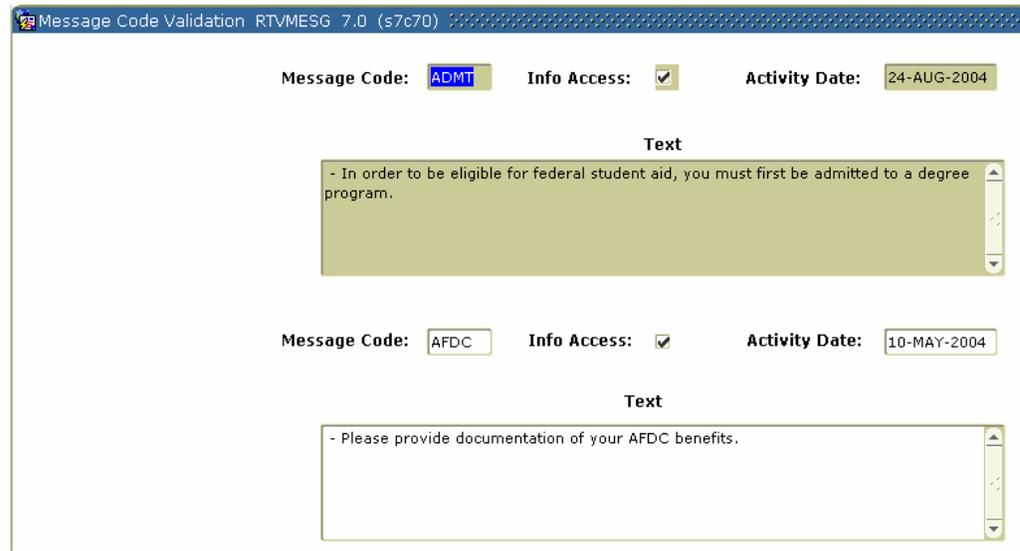
Message Code Validation Form

Introduction

The Message Code Validation Form (RTVMESG) permits the maintenance of message-related codes and text. This form is found on the Common Functions Control Menu.

Warning: When creating message text DO NOT use double quotes “ ”, or other characters in the text. Miscellaneous characters within the text create problems with the Letter Generation process and printing of letters.

Banner form



Message Code Validation RTVMESG 7.0 (s7c70)

Message Code: ADMT Info Access: Activity Date: 24-AUG-2004

Text

- In order to be eligible for federal student aid, you must first be admitted to a degree program.

Message Code: AFDC Info Access: Activity Date: 10-MAY-2004

Text

- Please provide documentation of your AFDC benefits.

Procedure

Follow these steps to create a budget group message.

Step	Action
1	Access the Message Code Validation Form (RTVMESG).
2	Perform an Insert Record function.
3	Enter a code in the Message Code field for the new message. <u>Note:</u> For practice, create a message code for the budget group defined.
4	Enter the free-form text message in the Text field.
5	The Info Access box is not enabled for budget group messages.
6	Click the Save icon.
7	Click the Exit icon.

Message Rules Form

Introduction

The Message Rules Form (RORMESG) enables you to associate budget message codes with a budget group. This allows you to print explanatory messages on letters to further describe the student's budget.

Banner form

Message Rules RORMESG 7.0 (s7c70)

Aid Year: 0405 Type: Budgeting Code: UGINHM Undergrad Resident At Home

Message Code	Message Description	Activity Date
UIHM	- Your budget was determined on being an in-state student and residing at home. If this information is	27-FEB-2004

Procedure

Follow these steps to associate a budget code and message to a budget group.

Step	Action
1	Access the Message Rules Form (RORMESG).
2	Enter code for the aid year in the Aid Year field or select it from the LOV.
3	Select <i>Budgeting</i> in the Type field.
4	Enter the budget group code in the Code field to which you want to add the message or select it from the LOV.
5	Enter the code in the Message Code field for the message that you created in the Message Code Validation Form (RTVMESG) procedure. <u>Note:</u> This message can be associated with this budget group on any letter to a student. However, budget messages are not displayed on Self Service.
6	Click the Save icon.
7	Click the Exit icon.

Self Check

Directions	Use the information you have learned in this workbook to complete this self check activity.
Question 1	Once you have established an aid period on the Aid Period Validation Form (RTVAPRD), you will then complete the <ul style="list-style-type: none">a) Aid Period/Terms Rules Form (RORTPRD).b) Institutional Options Form (ROAINST).c) Financial Aid Term Code Inquiry Form (ROITERM).d) Aid Year Inquiry Form (ROAIDY).e) Budget Component Validation Form (RTVCOMP).
Question 2	You will establish budgeting group selection criteria on the <ul style="list-style-type: none">a) Budget Component Rules Form (RBRCOMP).b) Financial Aid Selection Rules Form (RORRULE).c) Budget Group Validation Form (RTVBGRP).d) Institutional Options Form (ROAINST).e) Budget Component Validation Form (RTVCOMP).
Question 3	You will associate a message with a budget group on the <ul style="list-style-type: none">a) Message Code Validation Form (RTVMESG).b) Applicant Comments Form (RHACOMM)c) Message Rules Form (RORMESG).d) Budget Group/Type Rules Form (RBRGTYP).e) Budget Group Validation Form (RTVBGRP).
Question 4	The final step for putting all of the <i>pieces</i> of a budget together is on the <ul style="list-style-type: none">a) Budget Component Rules Form (RBRCOMP).b) Budget Group Validation Form (RTVBGRP).c) Budget Component Validation Form (RTVCOMP).d) Budget Type Validation Form (RTVBTYP).e) Budget Group/Type Rules Form (RBRGTYP).
Question 5	Click the default checkbox on the RTVCOMP for each component you want to display automatically when creating budgets on the RBRCOMP form. True or False

Answer Key for Self Check

-
- Question 1** Once you have established an aid period on the Aid Period Validation Form (RTVAPRD), you will then complete the
- a) Aid Period/Terms Rules Form (RORTPRD).**
-
- Question 2** You will establish budgeting group selection criteria on the
- b) Financial Aid Selection Rules Form (RORRULE).**
-
- Question 3** You will associate a message with a budget group on the
- c) Message Rules Form (RORMESG).**
-
- Question 4** The final step for putting all of the *pieces* of a budget together is on the
- a) Budget Component Rules Form (RBRCOMP).**
-
- Question 5** Click the default checkbox on the RTVCOMP for each component you want to display automatically when creating budgets on the RBRCOMP form.
- True**
-

Section C: Day-to-Day Operations

Overview

Purpose The purpose of this section is to explain the day-to-day or operational procedures to handle applicant budgeting at your institution.

Intended audience Financial Aid office staff.

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

- place a student in a budget group
- change a student’s budget group to reflect mixed enrollment
- determine whether components were system generated, manually assigned, or generated as a result of mixed enrollment.

Prerequisites To complete this section, you should have

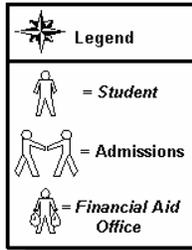
- completed the SCT Education Practices computer-based training (CBT) tutorial “SCT Banner 7 Fundamentals,” or have equivalent experience navigating in the SCT Banner system
- completed the Financial Aid Overview training workbook
- ensure that the rules and validation codes in SCT Banner needed for applicant budgeting have been set up.

In this section These topics are covered in this section.

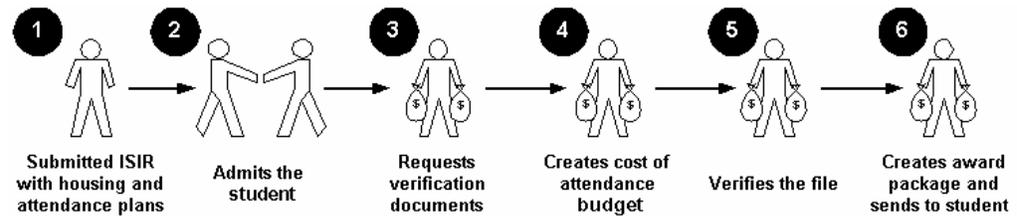
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Process Introduction

Flow diagram



This diagram highlights the processes used to assign budgets and modify budget amounts.



What happens

The stages of the process are described in this table.

Stage	Description
1	Student submits an ISIR to the college with housing preferences and attendance plans.
2	Admissions admits student to the institution.
3	FAO requests verification documents from the student, if required.
4	FAO creates a cost of attendance budget.
5	FAO verifies the file, if required.
6	FAO creates an award package to send to the student.

Assigning a Budget with the Create Budget Function, Continued

Procedure, continued

Step	Action
7	<p>Click the Create Budget icon to insert the default components and associated dollar amounts.</p> <p><u>Note:</u> The default listed on RBRGTYP will be the budget type displayed when automatically creating the budget components.</p>
8	<p>Note the System Indicator field at the end of each budget component line.</p> <p><u>Result:</u> The System Indicator field will show:</p> <ul style="list-style-type: none"> • <i>M</i> when requirements are manually entered/updated. • <i>S</i> when requirements are automatically entered/updated. • <i>B</i> when requirements are assigned using the batch posting process • <i>X</i> when mixed enrollment is being used. <p><u>Note:</u> The <u>Mixed Enrollment</u> tab allows for instances where students have mixed enrollment.</p> <p><u>Example:</u> A student may be an undergraduate student for the fall term and a graduate student for the spring term. The Mixed Enrollment tab will allow you to enter the student in an undergraduate group for 50 percent and a graduate group for 50 percent.</p>
9	Click the Exit icon.

Assigning a Budget with On-Line Immediate Processing

Introduction

The Applicant Immediate Process Form (ROAIMMP) is used to assign an applicant's budget.

Banner form

The screenshot shows the 'Applicant Immediate Process ROAIMMP 7.0 (C700)' form. At the top, there are fields for 'Aid Year' (set to 0405) and 'ID' (set to 810009306, with the name 'Carmen Carey' next to it). Below this, there are several assignment sections:

- Action Indicator:** (None)
- Tracking Group Assignment:** (None)
- Budgeting Group Assignment:** Immediate
- Packaging Group Assignment:** (None)
- SAP
- Packaging Fund Assignment:** (None)
- Need Analysis Calculation:** (None)
- Immediate Pell Calculation
- Disbursement Date Update
- Authorize or Disburse Available Aid

On the right side, there are columns for 'Term' (200509), 'Current Status', and 'Completion Date'. There are also 'Calculated From' and 'Effective' fields. At the bottom, there is a 'Letter Generation' section with fields for 'Letter Code', 'Term Code', 'Wait Days', and 'Initial Code'.

Procedure

Follow the steps to complete the process.

Step	Action
1	Access the Applicant Budget Form (RBAABUD).
2	Enter code in the Aid Year field for the aid year for which you are assigning budgets or select it from the LOV.
3	Enter the ID of a different practice student in the ID field.
4	Perform a Next Block function.
5	Select <u>Assign Budget Group</u> from the Options menu. <u>Result:</u> This will take you to the Immediate Process form (ROAIMMP).
6	Select <u>Immediate</u> from the drop-down menu in the Action Indicator column for the Budgeting field.
7	Click in the Term Code field to default the current term.

Continued on the next page

Assigning a Budget with On-Line Immediate Processing, Continued

Procedure, continued

Step	Action
8	Click the Save icon. <u>Result:</u> The grouping process executes the rules entered on RORRULE for budget groups. When it is finished, the results are displayed in the auto hint line.
9	Click the Exit icon. <u>Result:</u> The system will exit ROAIMMP and return to RBAABUD.
10	Review budget data for the student on the RBAABUD form.

Assigning Budgets with the Batch Grouping Process

Introduction

The Batch Grouping Process (ROBBGRP) is used to assign a budget to groups of students.

For more explanatory information about the job parameters, see the *SCT Banner Financial Aid User Manual*.

Banner form

The screenshot shows the Banner Financial Aid User Manual interface for the Batch Automatic Grouping Process (ROBBGRP). The form is titled "Process Submission Controls GJAPCTL 7.0 (C700)".

Process: ROBBGRP (dropdown) Batch Automatic Grouping (text field) **Parameter Set:** (dropdown)

Printer Control

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

Parameter Values

	Parameters	Values
01	Group Type Indicator	
02	Aid Year Code	
03	Term Code	
04	Use All Applicants Indicator	N
05	Selection Identifier	
06	Application Code	
07	Creator ID of Selection ID	

LENGTH: 3 TYPE: Character O/R: Required M/S: Single
Identifies which combinations of group selection to perform.

Submission

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

Procedure

Follow the steps to complete the process.

Step	Action
1	Access the Batch Automatic Grouping Process (ROBBGRP).
2	Double-click in the Printer field and select <i>Database</i> from the Printer Validation Form (GTVPRNT).

Continued on the next page

Assigning Budgets with the Batch Grouping Process, Continued

Procedure, continued

Step	Action																
3	<p>Enter these values in the parameters indicated here.</p> <p><u>Note:</u> All characters must be entered in upper case.</p> <table border="1" data-bbox="509 577 1416 1348"> <thead> <tr> <th data-bbox="509 577 760 609">Parameter</th> <th data-bbox="764 577 1416 609">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="509 615 760 724">Parameter 01: Group Type Indicator</td> <td data-bbox="764 615 1416 724">Enter a <i>B</i></td> </tr> <tr> <td data-bbox="509 730 760 798">Parameter 02: Aid Year Code</td> <td data-bbox="764 730 1416 798">Enter <i>0405</i> (or practice aid year)</td> </tr> <tr> <td data-bbox="509 804 760 871">Parameter 03: Term Code</td> <td data-bbox="764 804 1416 871">Leave this field blank for this exercise</td> </tr> <tr> <td data-bbox="509 877 760 1018">Parameter 04: Use All Applicants Indicator</td> <td data-bbox="764 877 1416 1018">Enter a <i>Y</i></td> </tr> <tr> <td data-bbox="509 1024 760 1123">Parameter 05: Selection Identifier</td> <td data-bbox="764 1024 1416 1123">Leave this field blank for this exercise</td> </tr> <tr> <td data-bbox="509 1129 760 1228">Parameter 06: Application Code</td> <td data-bbox="764 1129 1416 1228">Leave this field blank for this exercise</td> </tr> <tr> <td data-bbox="509 1234 760 1348">Parameter 07: Creator ID of Selection ID</td> <td data-bbox="764 1234 1416 1348">Leave this field blank for this exercise</td> </tr> </tbody> </table>	Parameter	Description	Parameter 01: Group Type Indicator	Enter a <i>B</i>	Parameter 02: Aid Year Code	Enter <i>0405</i> (or practice aid year)	Parameter 03: Term Code	Leave this field blank for this exercise	Parameter 04: Use All Applicants Indicator	Enter a <i>Y</i>	Parameter 05: Selection Identifier	Leave this field blank for this exercise	Parameter 06: Application Code	Leave this field blank for this exercise	Parameter 07: Creator ID of Selection ID	Leave this field blank for this exercise
Parameter	Description																
Parameter 01: Group Type Indicator	Enter a <i>B</i>																
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Parameter 04: Use All Applicants Indicator	Enter a <i>Y</i>																
Parameter 05: Selection Identifier	Leave this field blank for this exercise																
Parameter 06: Application Code	Leave this field blank for this exercise																
Parameter 07: Creator ID of Selection ID	Leave this field blank for this exercise																
4	Click the Save Parameter Set as checkbox.																
5	Leave the Name and Description fields blank for this exercise.																
6	Click the Save icon.																
7	View the Auto Hint line at the bottom of the form and note the sequence number assigned to the job.																

Continued on the next page

Assigning Budgets with the Batch Grouping Process, Continued

Procedure, continued

Step	Action
8	Select <u>Review Output</u> on the Options menu. <u>Result:</u> The Saved Output Review form will display and you will see the name of the job (ROBBGRP) and the sequence number that you noted in the Hint line.
9	Double click in the File Name field. <u>Result:</u> This will display a .log and a .lis file for the process.
10	Select the .log file. <u>Result:</u> Information about how the job functioned is displayed.
11	Select the Rollback function to access the Key block of the Saved Output Review Form (GJIREVO).
12	Double click in the File Name field.
13	Select the .lis file.
14	Select <u>Show Document</u> , <u>Save File</u> or <u>Delete</u> from the Options menu.

Viewing results

You can also check the results of the process by looking at the Group Inquiry Form (ROIGRPI). This inquiry form displays the cumulative results from all executions of ROBBGRP. With each run of the job, the numbers will increment according to the population processed.

Continued on the next page

Assigning Budgets with the Batch Grouping Process, Continued

Banner form

Group Inquiry ROIGRPI 7.0 (C700)

Aid Year: 0405 Aid Year 2004 - 2005 Group Type: Budgeting

Term: []

Code		Group Priority	Award Priority	Rules Exist	Information Access	Student Count	Activity Date
UGNHM	Undergrad Resident At Home	5	[]	N	<input checked="" type="checkbox"/>	3	04-JAN-1995
UGINOF	Undergrad Resident Off Campus	10	[]	N	<input type="checkbox"/>	1	04-JAN-1995
UGINON	Undergrad Resident On Campus	15	[]	N	<input type="checkbox"/>	1	04-JAN-1995
UGOSHM	Undergrad Non-res At Home	20	[]	N	<input type="checkbox"/>	0	04-JAN-1995
UGOSOF	Undergrad Non-res Off Campus	25	[]	N	<input type="checkbox"/>	0	04-JAN-1995
UGOSON	Undergrad Non-res On Campus	30	[]	N	<input type="checkbox"/>	0	04-JAN-1995
GRNHM	Graduate Resident At Home	35	[]	N	<input type="checkbox"/>	0	04-JAN-1995
GRINOF	Graduate Resident Off Campus	40	[]	N	<input type="checkbox"/>	0	04-JAN-1995
GRINON	Graduate Resident On Campus	45	[]	N	<input type="checkbox"/>	0	04-JAN-1995
GROSHM	Graduate Non-res At Home	50	[]	N	<input type="checkbox"/>	0	04-JAN-1995
GROSOF	Graduate Non-res Off Campus	55	[]	N	<input type="checkbox"/>	0	04-JAN-1995
GROSON	Graduate Non-res On Campus	60	[]	N	<input type="checkbox"/>	0	04-JAN-1995
DEFAULT	Budgeting Default Group	300	[]	N	<input type="checkbox"/>	0	04-JAN-1995

Student Count ==> Total: [5] Query: [5]

Procedure

Follow these steps to view the Group Inquiry Form (ROIGRPI).

Step	Action
1	Access the Group Inquiry Form (ROIGRPI).
2	Verify the aid year information is correct.
3	Perform a Next Block function.
	Result: The number of students associated with each group is displayed in the Student Count field.

Changing a Budget Group and Aid Period

Introduction

The Applicant Budget Form (RBAABUD) is used to change a budget group and aid period.

Banner form

The screenshot shows the Applicant Budget Form (RBAABUD 7.0) with the following fields and values:

- Aid Year:** 0405
- ID:** 610009306, Carmen Carey
- Budget Group and Period:**
 - Group:** UGINH4 Undergrad Resident At Home
 - Period:** FASPR Fall-Spring Semesters
 - Percent of Full Year:** 100
 - Buttons:** Create Budget, Delete Budget
- Budget Type:**
 - Type:** CAMP Campus based
 - EFC Method:** F
 - System Indicator:** S
- Budget Components Table:**

Code	Description	Budget Components Amount	Activity Date	User ID	System Indicator
B+S	Books and Supplies	750	03-DEC-2004	FAISUSR	M
O/S	Non resident fee	2,000	03-DEC-2004	FAISUSR	M
PERS	Personal Expenses	950	03-DEC-2004	FAISUSR	M
R+B	Room and Board	3,550	03-DEC-2004	FAISUSR	M
T+F	Tuition and Fees	9,500	03-DEC-2004	FAISUSR	M
Total:		16,750			

Procedure

Follow these steps to change a budget group and aid period.

Step	Action
1	Access the Applicant Budget Form (RBAABUD).
2	Enter the aid year in the Aid Year field.
3	Enter an ID number of a student in the ID field.
4	Select the appropriate budget group in the Group field.
5	Select the correct period in the Period field.
6	Click the Create Budget icon. Result: This will default in the budget consistent with group and aid period from RBRCOMP.
7	Review the resulting change in EFC on ROASTAT and RNARSLT. Note: The student and/or parent EFC will adjust automatically if you have the Use EFC Proration field checked on the ROAINST form. If you are not using EFC proration, enter the number of months of budget duration on the RNAOVxx form and click <u>Calculate Need</u> on the Options menu to adjust the EFC.

Entering Comments About Budget Changes

Introduction

The Applicant Comments Form (RHACOMM) is used to enter comments about an applicant's changes in his/her budget.

Example: When a budget is modified, you want to document the changes in SCT Banner.

Banner form

Procedure

Follow these steps to complete the process

Step	Action
1	Access the Applicant Comments Form (RHACOMM).
2	Enter an ID number of a student in the ID field.
3	Enter the aid year in the Aid Year field for the aid year or select it from the LOV.
4	Enter a free-form text comment in the Comment fields for the budget adjustment.
5	Click the Save icon.
6	Click the Exit icon.

Entering Mixed Enrollment Budgets

Introduction The Applicant Budget Form (RBAABUD) is used to make adjustments to the student cost of attendance.

Banner form

Procedure Follow these steps to complete the process.

Step	Action
1	Access the Applicant Budget Form (RBAABUD).
2	Select an aid year in the Aid Year field.
3	Enter an ID number of the student in the ID field.
4	Perform a Next Block function.
5	Select the <u>Mixed Enrollment</u> tab.
6	Select a budget group code in the first Code field.
7	Enter the percentage of the student's enrollment in the Percent field of the student's enrollment accounted for by this group.
8	Select another budget group code in the next Code field.
9	Enter the percentage of the student's enrollment in the Percent field of the student's enrollment accounted for by this group. <u>Note:</u> The total percentage must equal 100.
10	Click the Save icon.
11	Perform an Insert Record function. <u>Result:</u> The Applicant Budget tab is displayed. Notice that X is displayed in the System Indicator field for each mixed budget component in the Budget Components block.
12	Click the Exit icon.

Self Check

Directions	Use the information you have learned in this workbook to complete this self check activity.
Question 1	<p>The two fields that must be populated in the Budget Group/Period block of the Applicant Budget Form (RBAABUD) in order for SCT Banner to calculate a budget for a student are the</p> <ul style="list-style-type: none">a) Group and Aid Period.b) Group and Term Code.c) Group and Prorate Indicator.d) Budget Type and Aid Period.e) Budget Group and Budget Type.
Question 2	<p>A mixed budget exists if the indicator in the Sys/Man column is marked with a</p> <ul style="list-style-type: none">a) M.b) X.c) S.d) D.e) J.
Question 3	<p>Below are three methods for creating a student budget on the Applicant Budget Form (RBAABUD).</p> <ul style="list-style-type: none">1. Access the Group Data window, enter a budget group and aid period and click the Create Budget icon.2. Access the ROAIMMP form and perform immediate on-line budget grouping.3. Run the batch ROBBGRP Batch Grouping process. <p>True False</p>
Question 4	<p>The name of the form you will use to document changes to a student's budget is the</p> <ul style="list-style-type: none">a) Applicant Comments Form (RHACOMM).b) Applicant Budget Form (RBAABUD).c) Applicant Requirements Tracking Form (RRAAREQ).d) Message Code Validation Form (RTVMESG).e) Message Rules Form (RORMESG).

Continued on the next page

Self Check, Continued

Question 5

You prevent the student's group and budget from changing during the batch grouping process by

- a) doing nothing because once a student is in a budget group, the grouping process cannot change the student's budget group.
 - b) accessing the Mixed Budget window on the RBAABUD form and clicking the Group Lock checkbox.
 - c) accessing the Group Data window on the RBAABUD form and clicking the Group Lock checkbox.
 - d) accessing the Group Data window on the RBAABUD form and inserting a record.
 - e) accessing the Group Data window on the RBAABUD form and saving the record.
-

Answer Key for Self Check

-
- Question 1** The two fields that must be populated in the Budget Group/Period block of the Applicant Budget Form (RBAABUD) in order for SCT Banner to calculate a budget for a student are the
- a) Group and Aid Period.**
-
- Question 2** A mixed budget exists if the indicator in the Sys/Man column is marked with a
- b) X.**
-
- Question 3** Below are three methods for creating a student budget on the Applicant Budget Form (RBAABUD).
- True**
-
- Question 4** The name of the form you will use to document changes to a student's budget is the
- a) Applicant Comments Form (RHACOMM).**
-
- Question 5** You prevent the student's group and budget from changing during the batch grouping process by
- c) accessing the Group Data window on the RBAABUD form and clicking the Group Lock checkbox.**
-

Section D: Reference

Overview

Purpose The purpose of this section is to provide reference materials related to the workbook.

In this section These topics are covered in this section.

Topic	Page
Set Up Forms and Where Used	D-2
Day-to-Day Forms and Set Up Needed	D-3
Forms Job Aid	D-4

Set Up Forms and Where Used

Purpose Use this table as a guide to the set up forms and the day-to-day forms that use them.

Setup Form		Day-to-Day Form(s)	
Form Name	Code	Form Name	Code
Aid Period Validation	RTVAPRD	Applicant Budget Form	RBAABUD
Aid Period/Term Rules	RORTPRD	Applicant Budget Form	RBAABUD
Budget Component Validation	RTVCOMP	Applicant Budget Form	RBAABUD
Budget Type Validation	RTVBTYP	Applicant Budget Form	RBAABUD
Budget Group Validation	RTVBGRP	Applicant Budget Form	RBAABUD
Financial Aid Selection Rules	RORRULE	Applicant Immediate Process Form	ROAIMMP
Budget Group/Type Rules	RBRGTYP	Applicant Budget Form	RBAABUD
Budget Component Rules	RBRCOMP	Applicant Budget Form	RBAABUD
Message Code Validation	RTVMESG	This form is linked to another set up form, Requirements Tracking Validation Form	
Message Rules	RORMESG	Text entered on this form will print explanatory information on letters to students regarding unsatisfied requirements.	

Day-to-Day Forms and Set Up Needed

Purpose Use this table as a guide to the day-to-day forms and the set up forms needed for each.

Day-to-Day Form	Setup Forms Needed
Applicant Budget Form (RBAABUD)	<ul style="list-style-type: none"> • Budget Group Validation Form (RTVBGRP) • Aid Period Validation form (RTVAPRD) • Budget Component Validation Form (RTVCOMP)
Applicant Immediate Process Form (ROAIMMP)	<ul style="list-style-type: none"> • Financial Aid Selection Rules Form (RORRULE)
Batch Grouping Process (ROBBGRP)	<ul style="list-style-type: none"> • N/A
Group Inquiry Form (ROIGRPI)	<ul style="list-style-type: none"> • N/A
Applicant Comments Form (RHACOMM)	<ul style="list-style-type: none"> • Aid Year Validation Form (ROIAIDY)

Forms Job Aid

Purpose

Use this table as a guide to the forms used in this workbook. The Owner column may be used as a way to designate the individual(s) responsible for maintaining a form.

Form Name	Form Description	Owner
RTVAPRD	Aid Period Validation	
RORTPRD	Aid Period/Term Rules	
RTVCOMP	Budget Component Validation	
RTVBTYP	Budget Type Validation	
RTVBGRP	Budget Group Validation	
RORRULE	Financial Aid Selection Rules	
RBRGTYP	Budget Group/Type Rules	
RBRCOMP	Budget Component Rules	
RTVMESG	Message Code Validation	
RORMESG	Message Rules	

Release Date

This workbook was last updated on 07/06/2005.
