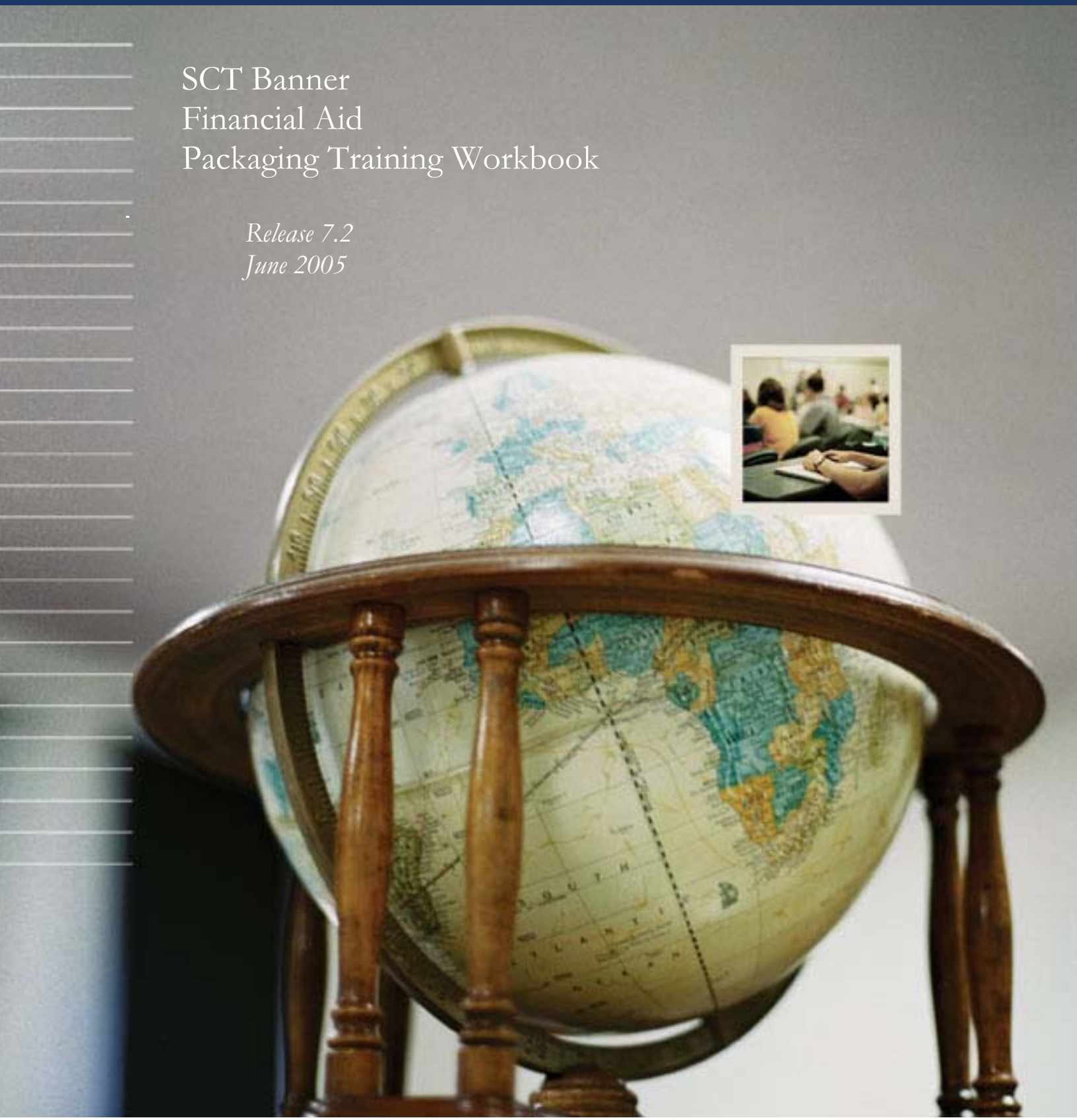
SCT Banner Financial Aid Packaging Training Workbook

Release 7.2
June 2005



SUNGARD®
SCT • HIGHER EDUCATION

Confidential Business Information

This documentation is proprietary information of SunGard SCT and is not to be copied, reproduced, lent or disposed of, nor used for any purpose other than that for which it is specifically provided without the written permission of SunGard SCT.

Prepared By: SunGard SCT
4 Country View Road
Malvern, Pennsylvania 19355
United States of America

© SunGard 2004. All rights reserved. The unauthorized possession, use, reproduction, distribution, display or disclosure of this material or the information contained herein is prohibited.

In preparing and providing this publication, SunGard SCT is not rendering legal, accounting, or other similar professional services. SunGard SCT 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.

SunGard, the SunGard logo, SCT, the SCT logo, and Banner, Campus Pipeline, Luminis, PowerCAMPUS, SCT fsaATLAS, SCT Matrix, SCT Plus, SCT OnSite and SCT PocketRecruiter are trademarks or registered trademarks of SunGard Data Systems Inc. or its subsidiaries in the U.S. and other countries. All other trade names are trademarks or registered trademarks of their respective holders.

Table of Contents

Topic	Page
Section A: Introduction	
Overview	A-1
Process Introduction	A-3
Terminology	A-5
Section B: Set Up	
Overview	B-1
Packaging Options Form	B-3
Packaging Group Validation Form	B-7
Financial Aid Selection Rules Form	B-8
Packaging Group Fund Rules Form	B-10
Default Packaging Rules Form	B-12
Packaging Rules Form	B-13
Group Inquiry Form	B-14
Additional Practice	B-16
Self Check	B-18
Answer Key for Self Check	B-20
Section C: Day-to-Day Operations	
Overview	C-1
Process Introduction	C-3
Assigning a Student Manually to a Packaging Group	C-4
Assigning a Student Online to a Packaging Group	C-8
Adding a Fund Manually to an Existing Package	C-10
Modifying an Award Amount of an Existing Package	C-12
Inputting Outside Resources	C-15
Preparing Mass Accept Awards	C-17
Additional Practice	C-19
Self Check	C-21
Answer Key for Self Check	C-24
Section D: Reference	
Set Up Forms and Where Used	D-2
Day-to-Day Forms and Set Up Needed	D-3
Forms Job Aid	D-4

Section A: Introduction

Overview

Workbook goal	The goal of this workbook is to provide you with the knowledge and practice to accurately package students with awards at your institution. The workbook is divided into four sections: • Introduction • Set-up • Day-to-day operations • Reference
Intended audience	Financial aid office administrators and staff
Objectives	At the end of this workbook, you will be able to • define packaging group codes and rules • define packaging options to determine when awards to students will be made • create exemptions and third-party contract rules • define when and how specific funds can be awarded to students using funds-management rules, and gap, equity and self-help packaging rules • enter and maintain resource information • assign a student to a packaging group either automatically online, manually, or in batch • award a student's funds based on rules, in batch or automatically online • manually award additional funds following automatic packaging to meet any remaining unmet need • send award letters • award, accept, and decline/cancel funds manually and through mass entry.
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 • 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.

Topic	Page
Process Introduction	A-3
Terminology	A-5

Process Introduction

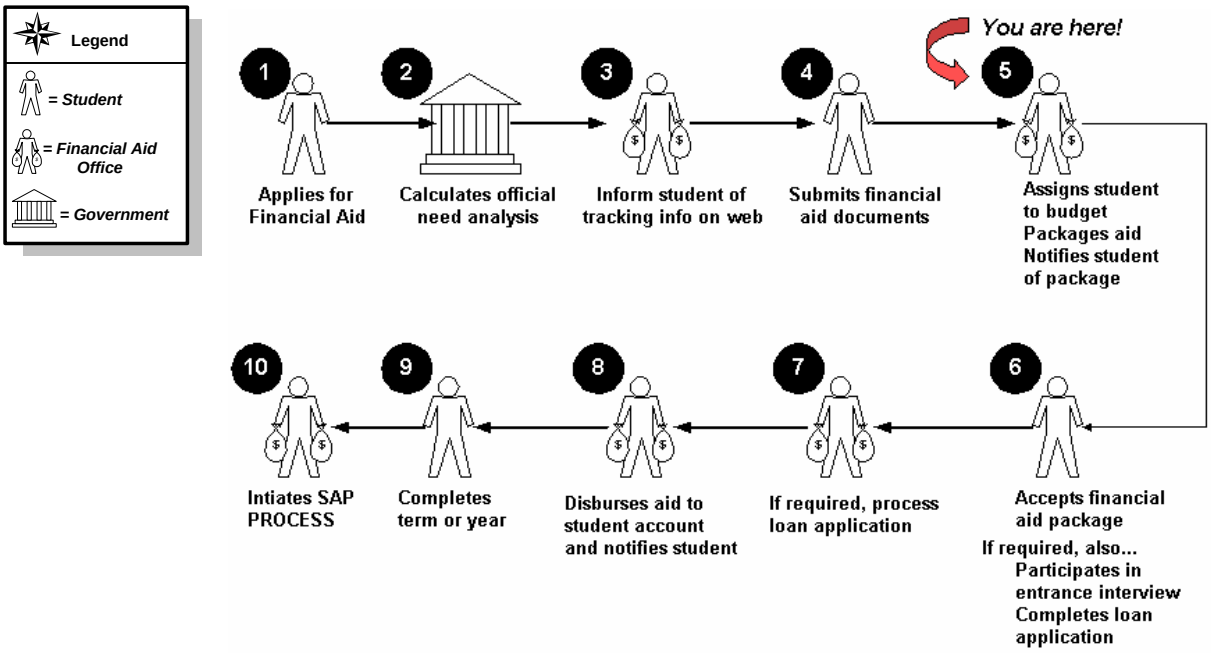
Introduction

The Financial aid office determines an award package for each applicant based on

- rules within the packaging module of SCT Banner
- data from other financial aid modules
- federal financial aid rules.

Flow diagram

This diagram highlights the processes used to package funds within the overall Financial Aid process.



Continued on the next page

Key points

Once a student has been placed into a tracking and budget group and completed the requirements, he/she is ready for the packaging process, using the Award Forms: (RPAAWRD, RPAAPMT, ROARMAN). The award maintenance forms displays and maintains packaging information for an applicant. The system automatically creates a RORSTAT record (for a student without a record for the aid year) when you enter any information on this form.

Packaging Groups can be posted automatically using the Immediate Process Form (ROAIMMP) or the Batch Automatic Grouping Process (ROBBGRP). Packaging groups can also be assigned manually through the RPAAWRD, RPAAPMT and ROARMAN forms.

Before automatically posting packaging groups, you must build Packaging group codes (RTVPGRP) and group assignment rules using the Financial Aid Selection Rules Form (RORRULE).

Once the packaging group is assigned, the Packaging Process (RPEPCKG) will assign funds to the student as determined by the user-defined packaging rules. Many factors determine packaging strategy.

Packaging can also be done on-line automatically using the user defined packaging rules from the RPAAWRD, RPAAPMT or ROARMAN forms.

The Award Acceptance Mass Entry Form (RPAMACC) enables you to enter a large number of applicant award acceptances or rejections. The Award Offer Mass Entry Form (RPAMOFF) allows for the entry of a large number of applicant award offers and/or acceptances.

Terminology

Award	A financial aid package.
Packaging group	A population of students with similar characteristics.

Section B: Set Up

Overview

Introduction	The Packaging module in SCT Banner permits you to define packaging groups, the funds that are to be given to each group and the order in which they are to be given, and the packaging philosophy to be used (gap, equity, or self-help). This module provides you with the following features. • Packaging Groups - defines an unlimited number of groups. • Grouping of Students - places students with similar characteristics into the same groups. Packaging philosophies - defined by packaging group • Mass Entry - allows entry of multiple awards for multiple students on a single screen. • Letter Generation - provides the ability to print letters to students informing them of their awards.
Purpose	The purpose of this section is to outline the set-up process and detail the procedures to set up your SCT Banner system to package student awards.
Intended audience	Financial aid office administrators
Objectives	At the end of this section, you will be able to • define packaging group codes and rules • define packaging options to determine when awards to students will be made • create exemptions and third-party contract rules • define when and how specific funds can be awarded to students using funds-management rules, and gap, equity and self-help packaging rules.
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 • 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.

Form Description/Topic	Page
Packaging Options Form	B-3
Packaging Group Validation Form	B-7
Financial Aid Selection Rules Form	B-8
Packaging Group Fund Rules Form	B-10
Default Packaging Rules Form	B-12
Packaging Rules Form	B-13
Group Inquiry Form	B-14
Additional Practice	B-16
Self Check	B-18
Answer Key for Self Check	B-20

Menu structure

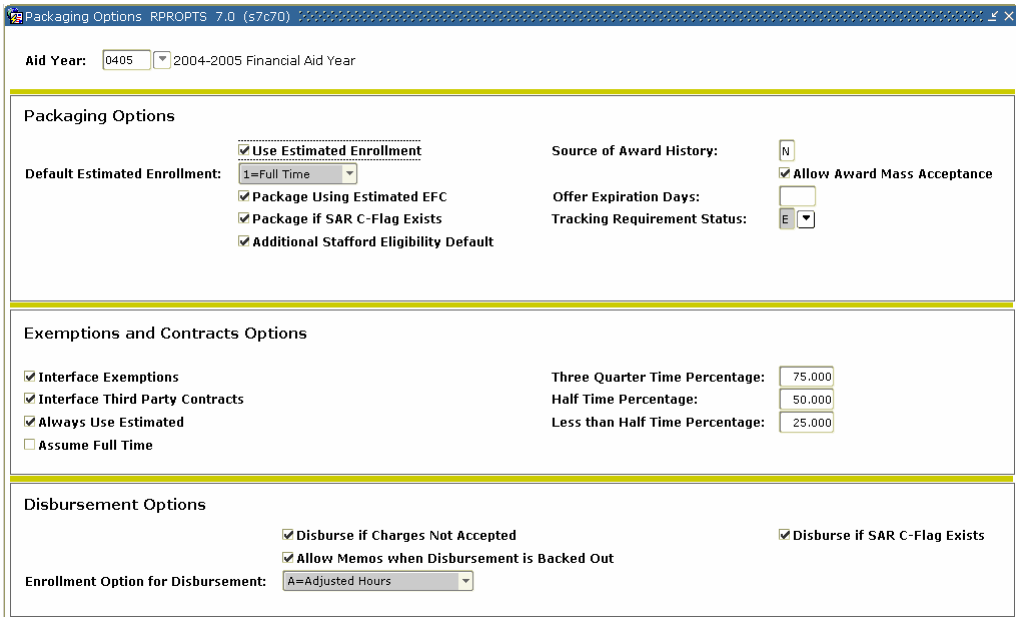
- Packaging and Disbursement [*RESPACK]
  - Package Maintenance [RPAAPMT]
  - Award Maintenance [RPAAWRD]
  - Financial Aid Record Maintenance [ROARMAN]
  - Award Acceptance Mass Entry [RPAMACC]
  - Award Offer Mass Entry [RPAMOFF]
  - Resource Maintenance [RPAARSC]
  - Applicant Comments [RHACOMM]
  - Applicant Immediate Process [ROAIMMP]
  - Contracts and Exemptions Payment Inquiry [RPIARPY]
  - Applicant Award by Term [RPIATRM]
  - Disbursement Results [ROIDISB]
  - Packaging and Disbursement Control [*RESPACKCM]
    - Financial Aid Selection Rules [RORRULE]
    - Packaging Group Fund Rules [RPRGFND]
    - Default Packaging Rules [RPRDEFR]
    - Packaging Rules [RPRPCKR]
    - Exemption Rules [RPREXPT]
    - Third Party Contract Rules [RPRCONT]

Packaging Options Form

Introduction

The Packaging Options Form (RPROPTS) permits the selection of options that control how certain functions in Financial Aid perform.

Banner form



Field options

The **Packaging Options** section of this form is used to review, set, and/or adjust the indicators according to your institution's packaging policies. Adjustable options include the items in this table.

Field	Description
Use Estimated Enrollment	Check box determines whether to use estimated enrollment by default. Estimated Enrollment is taken from the RCRAPP1_EXP_ENROLL_STATUS from the RNANAXX Need Analysis Form.
Default Estimated Enrollment	The value in this field is used if the **Use estimated enrollment** indicator is not checked. Also used if the **Use estimated enrollment** indicator is checked but the RCRAPP1 expected enrollment field is null on the Need Analysis Form (RNANAxx).
Package Using Estimated EFC	A packaging option that allows the institution to package using estimated EFC. A (Y)es permits estimated EFC's to be used in packaging. A (N)o prohibits estimated EFC's to be used in packaging.
Package if SAR C Flag Exists	Indicates whether Packaging should occur if SAR C-Flags exist. Y or blank - Package even if C-Flags exist. N - Do not package if C-Flags exist.

Continued on the next page

Field options, continued

Field	Description
Addl Stafford Elig Default	Default indicator for additional Stafford eligibility. When this indicator is set to (Y)es, then all independent students will be eligible to receive the higher level of unsubsidized Stafford Loan.
Source of Award History	Indicates which source of award history to use during award packaging validation. B or blank - Banner, N - NSLDS.
Allow Award Mass Accept	A packaging option that enables the institution to accept the entire award package using the RPAMACC form.
Offer Expiration Days	A packaging option that allows the institution to determine the number of days that a financial aid offer is valid prior to expiration.
Tracking Requirement Status	Used to set an initial Tracking Requirement Status Code when the packaging of a fund triggers a requirement to be established. You may double-click the field to call up a table of existing status codes.
Contracts and Exemptions Options	Packaging options allowing you to interface contract and exemptions with accounts receivable and set rules prior to the exemptions and contracts being paid to the student. The exemptions and contract will feed over to financial aid as a resource.
Disbursement Options	Disbursement options allowing you to set that will either allow a disbursement to happen or not based on students situation (Enrollment, SAR C flags, Charges)

Procedure

Follow these steps to start the packaging implementation of SCT Banner.

Step	Action
1	Access the Packaging Options Form (RPROPTS).
2	Enter the **Aid Year** for which you will be setting packaging options.
3	Perform the **Next Block** function.
4	Review, set, and/or adjust the indicators in the **Packaging Options** section. Adjust some or all of these indicators, depending on the needs of your institution.

Continued on the next page

Procedure, continued

Step	Action
5	Review, set, and/or adjust the indicators in the **Exemptions/Contracts Options** section. Note: You may toggle interface exemptions and/or third-party contracts on or off here; determine whether to always use estimated values and/or assume full-time status by default, and set percentages for less-than-full-time status.
6	Review, set, and/or adjust the indicators in the **Disbursement Options** section. Note: You may determine here whether to disburse if charges are not accepted and/or if SAR C flags exist, whether to allow memos when disbursement has been backed out, and set an enrollment option for disbursement: Adjusted hours, Billing hours, or Expected enrollment.
7	Review, set, and/or adjust the indicators in the **Allow Memos when Disbursement is Backed Out.** This field indicates whether to allow memoing when disbursement has been backed out.
8	Click the **Save** icon.
9	Perform a **Next Block** function to access the Enrollment Cut Off Date Rules block.
10	Enter the term code appropriate to the aid year being used.
11	Enter the **Disbursement Enroll Option:** A, Adjusted Hours; B, Billing Hours, E, Expected Enrollment
12	Enter your institution's enrollment/census date in the **Cut Off Date** field. Result: This affects the Funds Management Form (RFRMGMT) options of the **If Ineligible Before/After Cut-Off Date** fields.
13	Click the **Save** icon.
14	Perform a **Next Block** function to access the Pell Options window.
15	Review, set, and/or adjust the indicators in the **Pay Pell If Disbursement Amount Differs from Award Amount** field. Note: This field indicates if the system should pay the disbursement amount, award amount or a zero amount when the award and disbursement amounts are not equal according to the Pell Payment chart. The choices are always pay, never pay or pay the lesser.

Continued on the next page

Procedure, continued

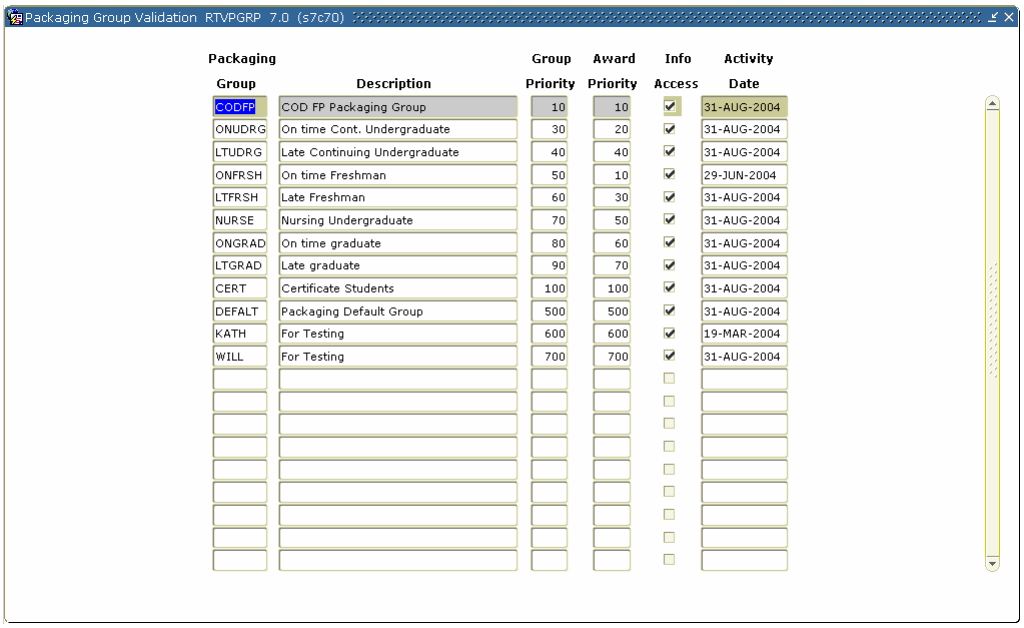
Step	Action
16	Review, set, and/or adjust the indicators in the **Default Less Than Half Time COA** field. Result: This indicates the default PELL Cost of Attendance for students who are enrolled for less than half time.
17	Review, set, and/or adjust the indicators in the **Pay Pell If System EFC and SAR EFC Are In Same Pell Payment Cell** field. Note: This field indicates whether to disburse Pell when System EFC and SAR EFC aren't equal but are within the same PELL payment cell.
18	Review, set, and/or adjust the indicators in the **Delete Pell Award if Zero** field. Note: A 'Y' indicates that Pell awards should be deleted from the database if the award is reduced to 0 by the Pell calculation, if no locks, originations, memo, authorization, or paid amounts exist.
19	Perform a **Next Block** function.
20	Review, set, and/or adjust the indicators in the **Term Code** field. Note: This is the code defining the term for association with the financial aid cut-off date.
21	Review, set, and/or adjust the indicators in the **Pell Award Enroll Option** field. Note: This indicates where the RPEPELL program is to retrieve the enrollment for the students selected when awarding PELL.
22	Review, set, and/or adjust the indicators in the **Pell Disbursement Enrollment Option** field. Note: This indicates where the RPEDISB program is to retrieve the enrollment for the students selected when disbursing PELL.
23	Review, set, and/or adjust the indicators in the **Pell ISIR Term** field. Note: If the choice in the Pell Award Enroll Option field is to award based on the ISIR/ FAFSA term, this indicator ties the term form to the appropriate term field on the Term Enrollment Information window of the Needs Analysis Form (RNANAxx). The Term Enrollment Information window fields must be populated by the institution, as this information is no longer collected on the FAFSA.

Packaging Group Validation Form

Introduction

The Packaging Group Validation Form (RTVPGRP) is used to create packaging groups and establish the priority rules for the group assignment and fund awarding processes.

Banner form



Packaging Group	Description	Group Priority	Award Priority	Info Access	Activity Date
CODFP	COD FP Packaging Group	10	10	✓	31-AUG-2004
ONUDRG	On time Cont. Undergraduate	30	20	✓	31-AUG-2004
LTUDRG	Late Continuing Undergraduate	40	40	✓	31-AUG-2004
ONFRSH	On time Freshman	50	10	✓	29-JUN-2004
LTFRSH	Late Freshman	60	30	✓	31-AUG-2004
NURSE	Nursing Undergraduate	70	50	✓	31-AUG-2004
ONGRAD	On time graduate	80	60	✓	31-AUG-2004
LTGRAD	Late graduate	90	70	✓	31-AUG-2004
CERT	Certificate Students	100	100	✓	31-AUG-2004
DEFALT	Packaging Default Group	500	500	✓	31-AUG-2004
KATH	For Testing	600	600	✓	19-MAR-2004
WILL	For Testing	700	700	✓	31-AUG-2004

Procedure

Follow these steps to complete the process.

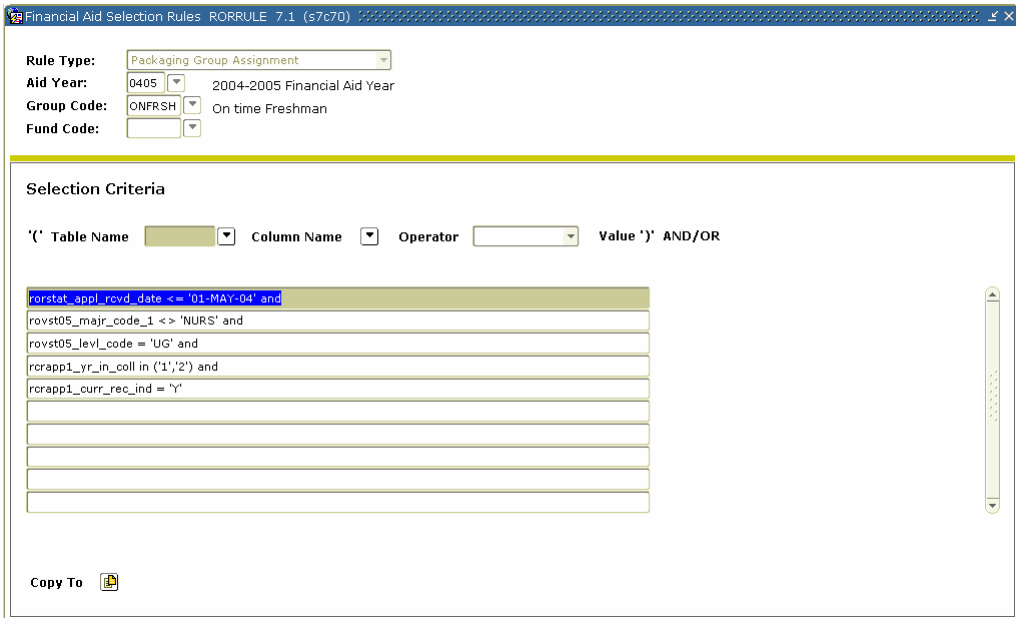
Step	Action
1	Access the Packaging Group Validation Form (RTVPGRP).
2	Enter the following to define your packaging group code: FRSHXX (where 'XX' are your initials).
3	Enter a **Description** to identify your group as FRSHXX (where XX are your initials).
4	Enter the **Packaging Group Priority** and the **Award Priority**. Note: Smaller values have higher processing priority; your values entered in these fields should always be less than that of the Packaging Default Group. Numbers for each group should be unique.
5	Enter the info Access – if a packaging group info access is checked then all students in that group, there awards are viewable in Self-Service, if the groups info access is not checked then the students awards are not viewable in Self-Service.
6	Click the **Save** icon.
7	Click the **Exit** icon.

Financial Aid Selection Rules Form

Introduction

The Financial Aid Selection Rules Form (RORRULE) enables you to perform a variety of functions based on the rule type. Instructions on this form are written in SQL and direct SCT Banner to assign the packaging groups according to the varying rules.

Banner form



Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Financial Aid Selection Rules Form (RORRULE).
2	Select Packaging Group Assignment in the **Rule Type** field.
3	Enter the appropriate **Aid Year.**
4	Enter the **Group Code** previously created on RTVPGRP (FRSHXX). Note: Do not input a fund code.

Continued on the next page

Procedure, continued

Step	Action

5	Determine what your selection criteria for this packaging group will be and enter that data into the **Selection Criteria** field. (example XX is for the aid year ending 0506 (06), XXXX is for the year 2005)
	
	<u>Examples</u>: Here are some examples of possible selection criteria.
	Freshman On-Time:
	`RORSTAT_APPL_RCVD_DATE <= '01-MAY-XXXX' AND`
	
	`ROVSTXX_LEVL_CODE = 'UG' AND`
	`RCRAPP1_YR_IN_COLL IN ('1','2') AND`
	`RCRAPP1_CURR_REC_IND = 'Y'`
	Freshman Late:
	`RORSTAT_APPL_RCVD_DATE > '01-MAY-XXXX' AND`
	
	`ROVSTXX_LEVL_CODE = 'UG' AND`
	`RCRAPP1_YR_IN_COLL IN ('1','2') AND`
	`RCRAPP1_CURR_REC_IND = 'Y'`
	
	Additional lines may be added to these groups to allow further definition. For example, add `RCRAPP1_STAT_CODE_RES = 'WA'` to select students who listed Washington State as their state of legal residence as listed on the Needs Analysis Form (RNANAxx).

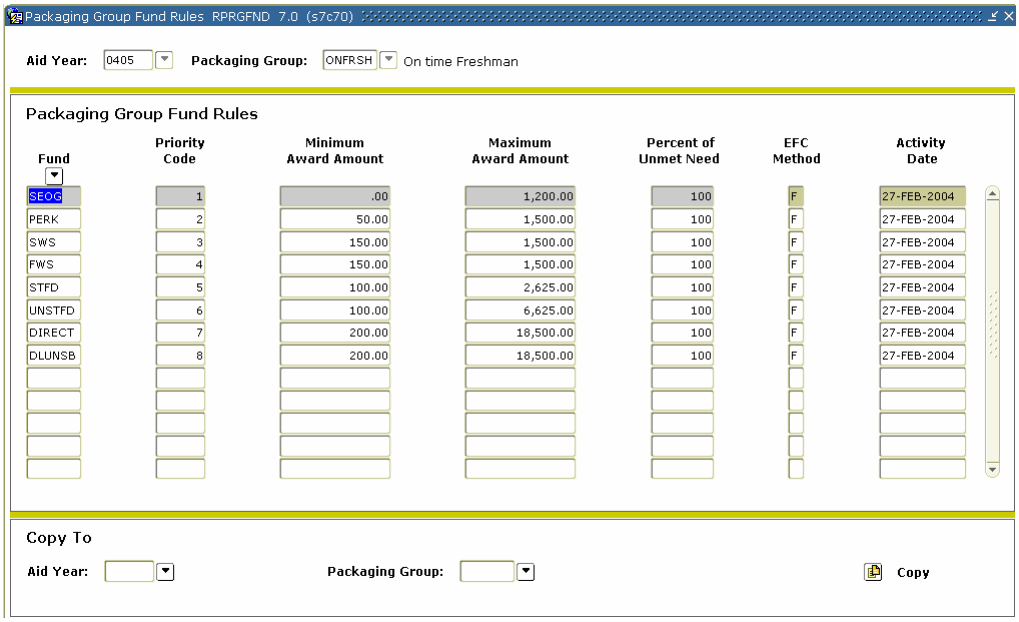
6	Click the **Save** icon. Select under options the compile rule option.
7	Click the **Exit** icon. <u>Result</u>: By exiting the form, the rule will compile if you haven't already performed the compile process.

Packaging Group Fund Rules Form

Introduction

The Packaging Group Fund Rules Form (RPRGFND) is used to establish fund-specific rules for your packaging group.

Banner form



Fund	Priority Code	Minimum Award Amount	Maximum Award Amount	Percent of Unmet Need	EFC Method	Activity Date
SEOG	1	.00	1,200.00	100	F	27-FEB-2004
PERK	2	50.00	1,500.00	100	F	27-FEB-2004
SWS	3	150.00	1,500.00	100	F	27-FEB-2004
FWS	4	150.00	1,500.00	100	F	27-FEB-2004
STFD	5	100.00	2,625.00	100	F	27-FEB-2004
UNSTFD	6	100.00	6,625.00	100	F	27-FEB-2004
DIRECT	7	200.00	18,500.00	100	F	27-FEB-2004
DLUNSB	8	200.00	18,500.00	100	F	27-FEB-2004

Procedure 1

Follow these steps to complete the process.

Step	Action
1	Access the Packaging Group Fund Rules Form (RPRGFND).
2	Enter the FRSHXX code you recently created in the Packaging Group field.
3	Click in the **Fund Code** field in the Packaging Group Fund Rules block and use the List of Values to select the funds to be awarded in this packaging group. Select a variety of funds (except Pell Grant, whose packaging process, RPEPELL, occurs outside of the RPEPCKG Process) including grants, loan, and work.
4	Define the priority code for the funds. Note: This is the order in which you want SCT Banner to auto-package the fund to this group of students. The lower the number the higher the priority.

Continued on the next page

Procedure, continued

Step	Action
5	Click in the **Award Amount Minimum** and **Maximum** fields and define the minimum and maximum amount a student may be awarded. Note: Initially the award minimum and maximum will be populated from the RFRMGMT Form, but these amounts may be changed for specific packaging groups as needed.
6	Click in the **Percent Unmet Need** field and enter the percentage of unmet need this fund should meet when being awarded.
7	Click in the **EFC Method** field and define the methodology to be used in packaging the fund: I(nstitutional) or F(ederal).
8	Click the **Save** icon.

Procedure 2

Follow these steps to complete the process.

Step	Action
1	Access the Financial Aid Selection Rules Form (RORRULE).
2	Select Packaging Group Fund Awarding in the **Rule Type** field.
3	Confirm the previously used **Aid Year**.
4	Select a fund in the **Fund Code** field that you attached to the group on the Packaging Group Fund Rules Form (RPRGFND).
5	Move to the Selection Criteria block and enter (RORSTAT_VER_COMPLETE = 'Y' or RCRAPP1_VERIFICATION_MSG = '2') Note: This rule will prevent this specific fund for this specific packaging group from being awarded if a student was selected for verfication but verification is not complete.
6	Click the **Save** icon.
7	Select Compile Rule on the **Options** menu.
8	Click the **Exit** icon. Result: By exiting the form, the rule will compile if you haven't already performed the compile process.

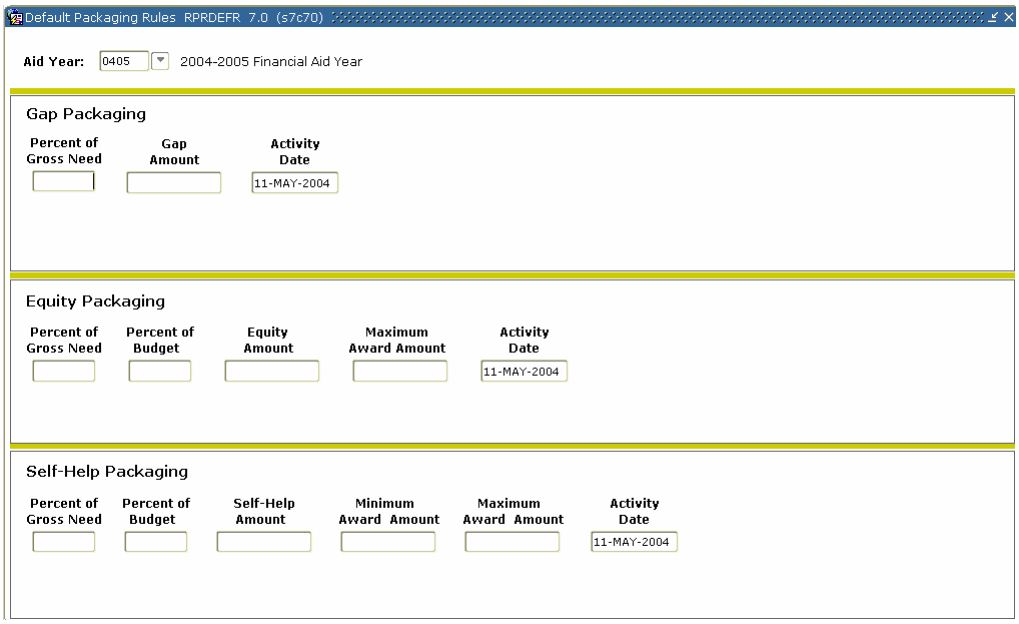
Default Packaging Rules Form

Introduction

The Default Packaging Rules Form (RPRDEFR) may be used to set default limits and specifications for gap, equity, and self-help packaging for Financial Aid award packaging. This is an optional form depending on institutional policy.

Example: A decision has been made that all students who submitted their financial aid application after your deadline will have a mandatory $500 gap in their financial aid award. In other words, every student who submitted his/her FAFSA late will have a minimum of $500 of unmet need automatically built into his/her financial aid award.

Banner form



Procedure

Follow these steps to complete the process.

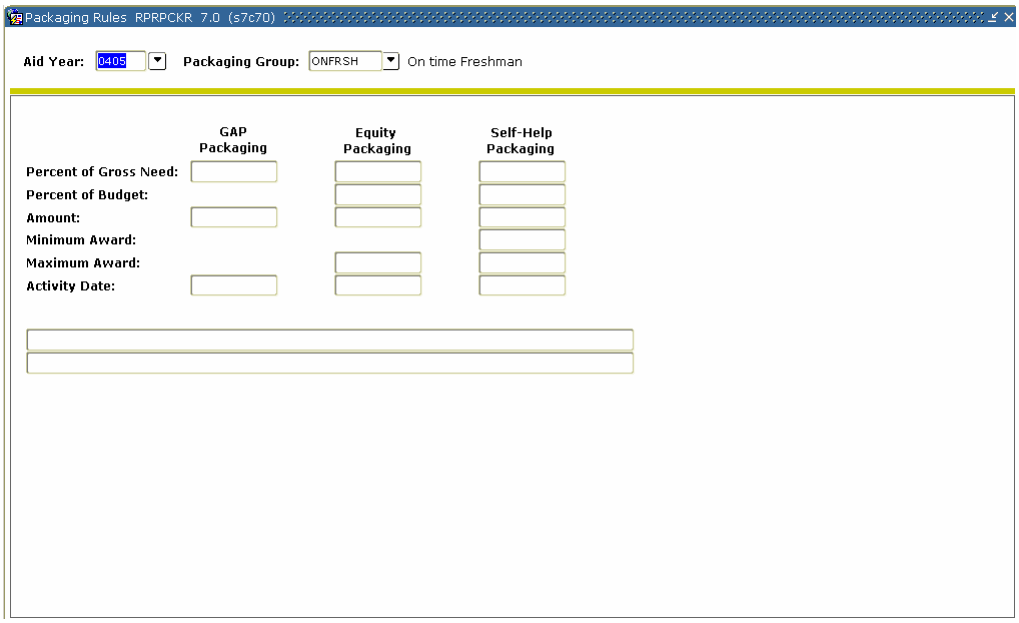
Step	Action
1	Access the Default Packaging Rules Form (RPRDEFR).
2	Confirm the **Aid Year**.
3	Move to the GAP Packaging block.
4	Enter $500 in the **GAP Amount** field.
5	Click the **Save** icon.
6	Click the **Exit** icon.

Packaging Rules Form

Introduction

The Packaging Rules Form (RPRPCKR) may be used to automate GAP, equity, or self help packaging strategies based on packaging groups. This is an optional form depending on institutional policy.

Banner form



Procedure

Follow these steps to complete the process.

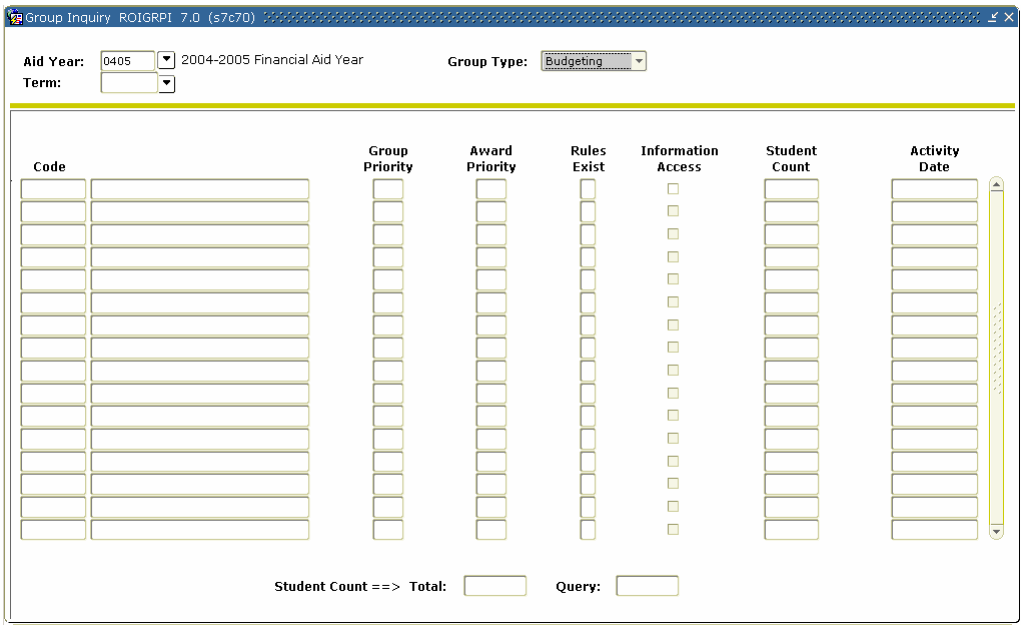
Step	Action
1	Access the Packaging Rules Form (RPRPCKR).
2	Confirm the **Aid Year**.
3	Select a **Packaging Group** from the List of Values that has been determined to be a pool of the late applicants. Note: The group you created, FRSHXX, may be used.
4	Move to the **Gap Packaging Amount** field.
5	Perform an **Insert Record** function to pull your default amount created on RPRDEFR.
6	Modify your GAP amount from $500 to $250. This will change the default from $500 to $250 only for the packaging group you have created. If your packaging group does not have a different amount than the default created on RPRDEFR, this step does not need to be performed.
7	Click the **Save** icon.

Group Inquiry Form

Introduction

Use the Group Inquiry Form (ROIGRPI) to display group information for all valid group codes and the number of students assigned to each group for the specified aid year and group type.

Banner form



Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Group Inquiry Form (ROIGRPI). Note: This form is an inquiry only form, so the information displayed cannot be updated, changed, or deleted.
2	Confirm the correct **Aid Year** in the key block.
3	Select the group type in the **Group Type** field to specify the type of information to be displayed in the form Note: The **Term** field is valid only when the Group Type is SAP.

Continued on the next page

Group Inquiry Form, Continued

Procedure, continued

Step	Action
4	Review the fields described in the table.

Column	Purpose
Code	Group code and description for the Group type and Aid Year in the Key block.
Group Priority	Displays the priorities to be used during the automatic grouping process (ROBBGRP), as defined on RTVPGRP.
Award Priority	Displays the priorities to be used during the automatic packaging process (RPEPCKG), as defined on RTVPGRP.
Rules Exist	Indicates whether group assignment rules have been established in RORRULE.
Information Access	This field will be checked if the info access indicator is checked for the group on RTVPGRP
Student Count	Indicates a total number of students that have been assigned to each group.
Student Count Total	The total student count for the group type in the key block.
Student Count Query	The total number of students assigned to the tracking groups included in that query.

5	Click the **Exit** icon.

Additional Practice

Procedure 1

A decision has been made that all returning students cannot be awarded grants in excess of 75 percent of their total budget. Your institution has set the budget for an academic year to be $15,000. Therefore, the total grant amount awarded to a returning student will never exceed $10,500.

Step	Action
1	Access the Default Packaging Rules Form (RPRDEFR).
2	Confirm the **Aid Year**.
3	Move to the Equity Packaging block and enter 75 percent in the **Percent of Budget** field.
4	Click on the **Save** icon.
5	Click the **Exit** icon
6	Access the Packaging Rules Form (RPRPCKR).
7	Confirm the **Aid Year**.
8	Select a Packaging Group from the List of Values that has been determined to be a pool of the returning students.
9	Move to the **Equity Packaging Percent of Budget** field.
10	Perform an **Insert Record** function to pull your default percentage created on RPRDEFR.
11	Click the **Save** icon.
12	Click the **Exit** icon.

Continued on the next page

Additional Practice, Continued

Procedure 2

A decision has been made that all freshmen students must have a minimum of $2000 of self-help (work or loans) award in their award package.

Note: Equity Packaging and Self-Help packaging are mutually exclusive. Banner will allow you to define one or the other, but not both. In order to perform this exercise, you will need to remove the equity packaging information.

Step	Action
1	Access the Default Packaging Rules Form (RPRDEFR).
2	Confirm the **Aid Year**.
3	Move to the Self-Help Packaging block and enter $2000 in the **Amount** field.
4	Click on the **Save** icon.
5	Click on the **Exit** icon
6	Access the Packaging Rules Form (RPRPCKR).
7	Confirm the **Aid Year**.
8	Select a packaging group from the List of Values that has been determined to be a pool of the freshmen students.
9	Move to the **Self-Help Packaging Amount** field.
10	Perform an **Insert Record** function to pull your default amount created on RPRDEFR.
11	Click the **Save** icon.
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

The purpose for using the Packaging Options Form (RPROPTS) is to

a) define your global packaging policies.
b) create a packaging group.
c) establish fund awarding rules.
d) set up self-help packaging rules.
e) set up equity packaging rules.

Question 2

The packaging options listed below are found on which form?

- The Use Estimated Enrollment check box determines whether to use estimated enrollment by default.
- The Default Estimated Enrollment field sets the default option for all funds (full-time, ¾ time, ½ time or less than ½ time).
- The Package Using Estimated EFC check box determines whether estimated EFC will be used.
- The Package if SAR C Flag Exists check box determines whether packaging will be allowed when SAR C flags exist.
- Additional Stafford Eligibility Default determines whether SCT Banner should check for additional eligibility.
- The Allow Award Mass Accept check box determines whether mass acceptance of the entire applicant package will be allowed.
- The Offer Expiration Days field sets the number of days before the offer is no longer valid.
- The Tracking Requirement Status field will contain a tracking requirement status code; you may double-click the field to call up a table of existing status codes.

a) Institutional Options Form (ROAINST).
b) Packaging Group Fund Rules Form (RFRGFND).
c) Packaging Rules Form (RPRPCKR).
d) Packaging Options Form (RPROPTS).
e) Default Packaging Rules Form (RPRDEFR).

Continued on the next page

Self Check, Continued

Question 3

The two main steps you must follow to establish a packaging group are first you must

a) complete RPROPTS, then establish the group selection criteria on RORRULE.
b) create a packaging group on RTVPGRP, then establish the group selection criteria on RORRULE.
c) create RPRDEFR, then create RPRFSRC.
d) create RPRPCKR, then establish the group selection criteria on RORRULE.
e) create RPRGFND, then establish the group selection criteria on RORRULE.

Question 4

The form used to set up specific lists of funds for a packaging group is the

a) Packaging Rules Form (RPRPCKR).
b) Packaging Options Form (RPROPTS).
c) Packaging Group Validation Form (RTVPGRP).
d) Default Packaging Rules Form (RPRDEFR).
e) Packaging Group Fund Rules Form (RPRGFND).

Question 5

The SCT Banner Financial Aid System will allow you to define both Equity Packaging and Self-Help packaging simultaneously.

True False

Answer Key for Self Check

Question 1

The purpose for using the Packaging Options Form (RPROPTS) is to

a) define your global packaging policies.

Question 2

The packaging options listed below are found on which form?

d) Packaging Options Form (RPROPTS).

Question 3

The two main steps you must follow to establish a packaging group are first you must

b) create a packaging group on RTVPGRP, then establish the group selection criteria on RORRULE.

Question 4

The form used to set up specific lists of funds for a packaging group is the

e) Packaging Group Fund Rules Form (RPRGFND).

Question 5

The SCT Banner Financial Aid System will allow you to define both Equity Packaging and Self-Help packaging simultaneously.

False. Equity Packaging and Self-Help packaging are mutually exclusive. SCT Banner will allow you to define one or the other, but not both.

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 online and batch packaging at your institution.
Intended audience	Financial aid office staff.
Objectives	At the end of this section, you will be able to • enter and maintain resource information • assign a student to a packaging group either automatically online, manually, or in batch • award a student's funds based on rules, in batch or automatically online • manually award additional funds following automatic packaging to meet any remaining unmet need • send award letters • award, accept, and decline/cancel funds manually and through mass entry.
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 workbook. You will also need to ensure that the rules and validation codes in SCT Banner needed for packaging have been set up for you.

Continued on the next page

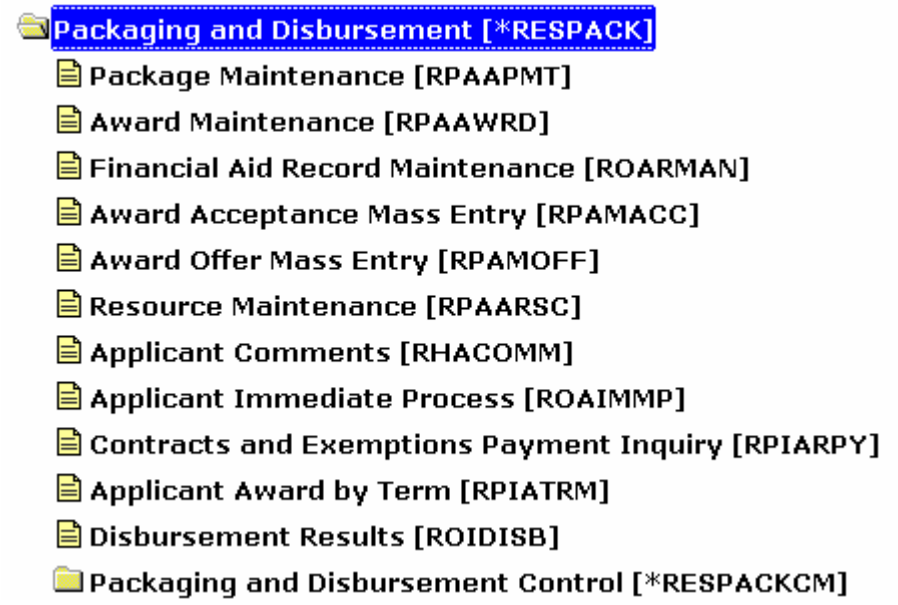
Overview, Continued

In this section

These topics are covered in this section.

Topic	Page
Process Introduction	C-3
Assigning a Student Manually to a Packaging Group	C-4
Assigning a Student Online to a Packaging Group	C-8
Adding a Fund Manually to an Existing Package	C-10
Modifying an Award Amount of an Existing Package	C-12
Inputting Outside Resources	C-15
Preparing Mass Accept Awards	C-17
Additional Practice	C-19
Self Check	C-21
Answer Key for Self Check	C-24

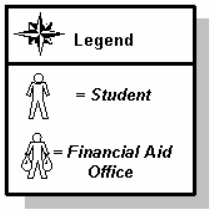
Menu structure

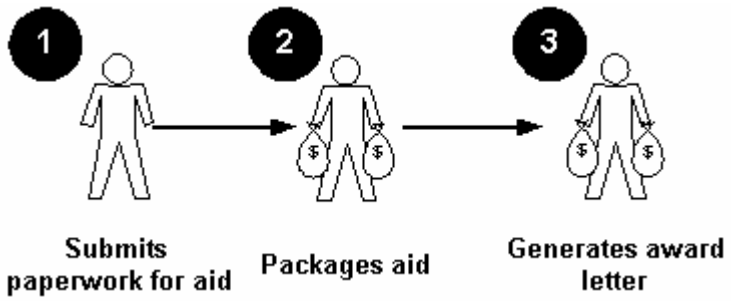


Process Introduction

Flow diagram

This diagram highlights the process used to package funds.





What happens

The stages of the process are described in this table.

Stage	Description
1	Student submits paperwork for aid.
2	Financial aid office packages aid.
3	Financial aid office generates award letter to send to student.

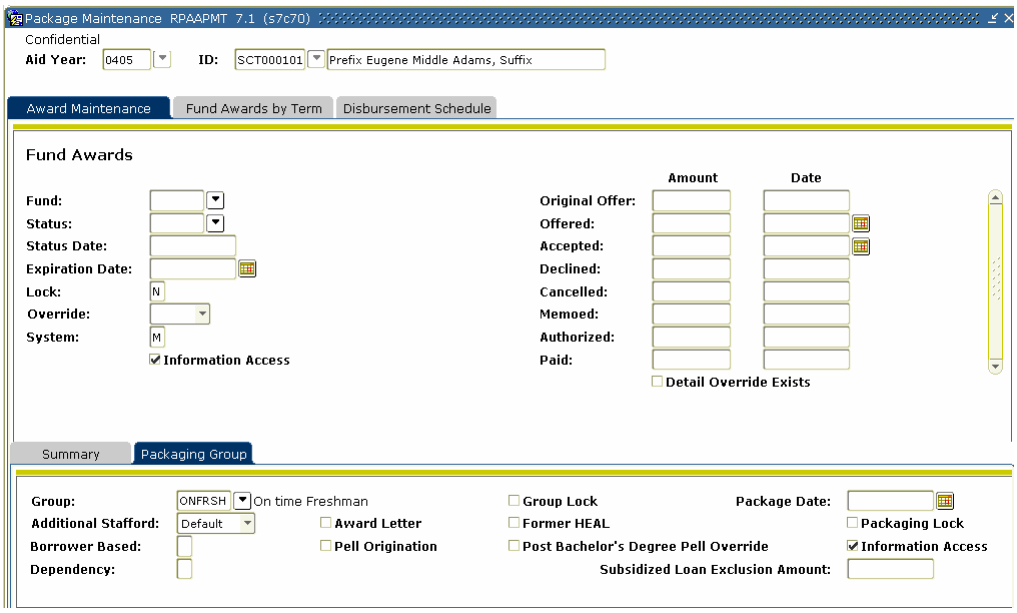
Assigning a Student Manually to a Packaging Group

Introduction

Once all the packaging options and packaging groups have been defined, you are ready to assign packaging groups to your students. If you are manually assigning a student to a packaging group, it is important to remember that the rules that were created to place a student into a packaging group will not be referenced for this procedure because you are overriding Banner to group a student manually.

You will use the Award Form Maintenance (RPAAWRD) to manually assign the students to a packaging group. The Award Maintenance Forms – Package Maintenance Form (RPAAPMT) and Financial Aid Record Maintenance (ROARMAN)-- can also be used in assigning a packaging group to a student manually.

Banner form



Continued on the next page

Assigning a Student Manually to a Packaging Group,
Continued

Procedure

Follow these steps to complete the process.

Note: The student must have a budget assigned in order for any awards to be packaged.

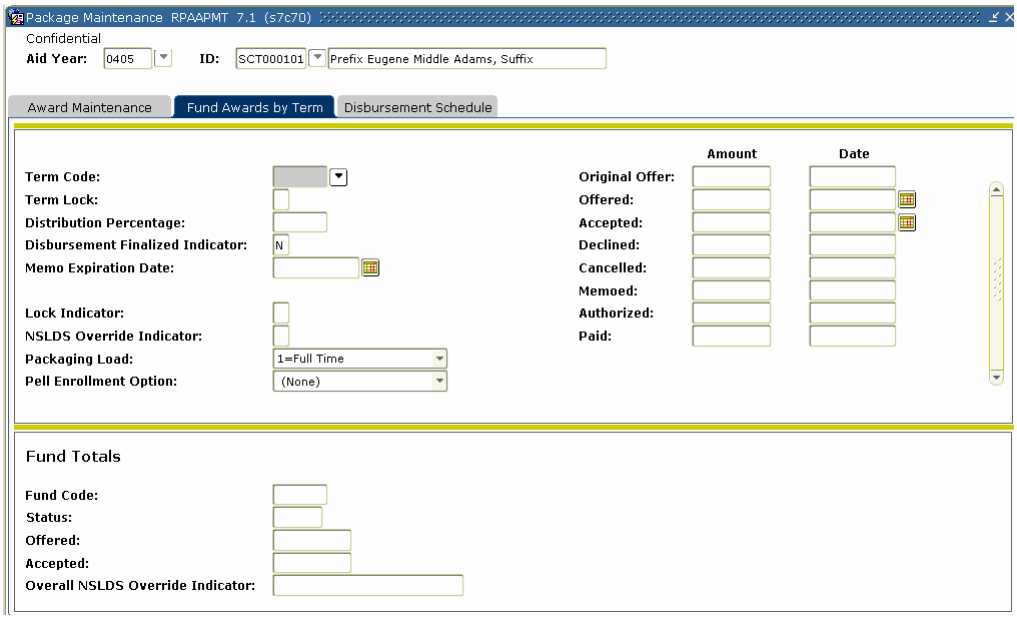
Step	Action
1	Access the Award Form (RPAAWRD).
2	Confirm the previously used **Aid Year**.
3	Enter the ID of a student in the **ID** field who exists in SCT Banner as a financial aid student.
4	Perform the **Next Block** function.
5	Select the Packaging Group tab at the bottom of the window.
6	Select the previously created group (FRSHXX) in the **Group** field.
7	Move to the **Fund** field on the Fund Awards block.
8	Select Assign Packaging Group from the **Options** menu. Result: SCT Banner will now attempt to package this student with the funds you attached to this packaging group on the Packaging Group Fund Rules Form (RPRGFND). All funds in the packaging group will be validated prior to being awarded.
9	Review the funds awarded to the student.
10	Select the **Summary** tab to view the updated unmet need based on the packaging process.
11	Click the **Save** icon.
12	Click the **Exit** icon.

Continued on the next page

Assigning a Student Manually to a Packaging Group,
Continued

Fund Awards by Term tab

The Fund Awards by Term tab displays the awards for the term you select.



Procedure

Follow these steps to complete the form.

Note: The student must have a budget assigned in order for any awards to be packaged.

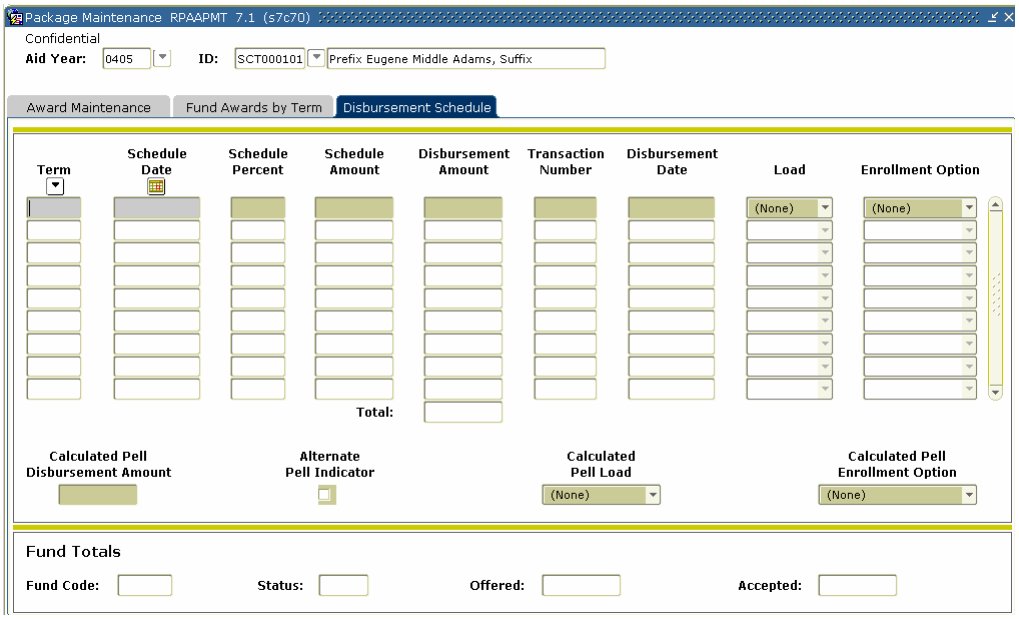
Step	Action
1	Access the Fund Awards by Term tab.
2	Select a term in the **Term Code** field.
3	Click the **Save** icon

Continued on the next page

Assigning a Student Manually to a Packaging Group, Continued

Disbursement Schedule tab

The Disbursement Schedule tab displays disbursement dates of the awards for the term you select.



Procedure

Follow these steps to complete the process.

Note: The student must have a budget assigned in order for any awards to be packaged.

Step	Action
1	Access the Disbursement Schedule tab.
2	Select a term in the **Term Code** field.
3	Click the **Save** icon
4	Click the **Exit** icon.

Continued on the next page

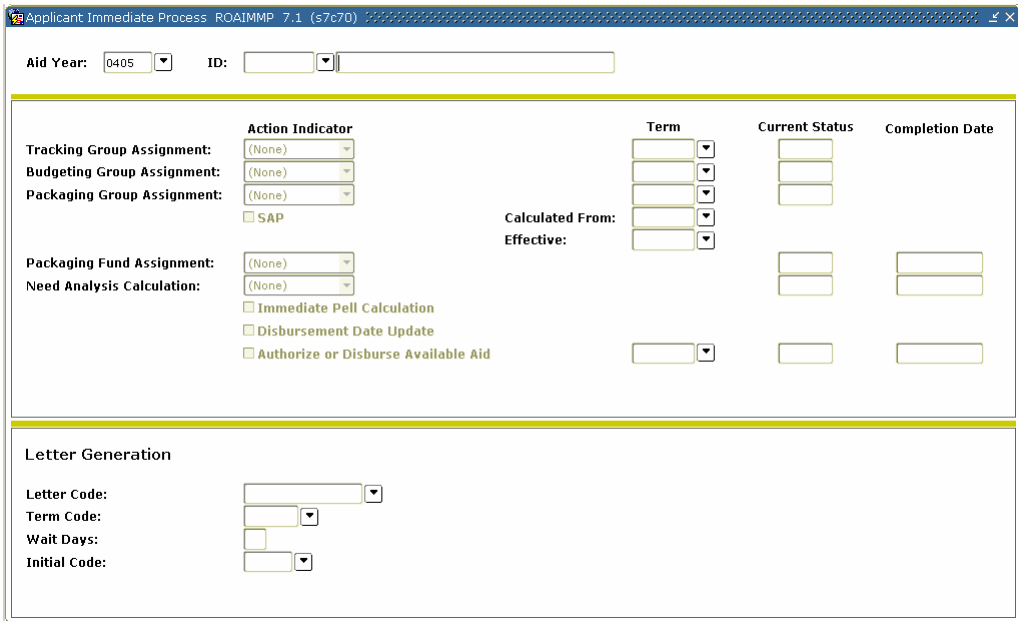
Assigning a Student Online to a Packaging Group

Introduction

Now that you are able to manually assign a student to a packaging group, it is time to have SCT Banner assign a student to a packaging group based on the rules that have been created.

You will use the Applicant Immediate Process Form (ROAIMMP) to assign the students online.

Banner form



Continued on the next page

Assigning a Student Online to a Packaging Group, Continued

Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Applicant Immediate Process Form (ROAIMMP).
2	Confirm the previously used **Aid Year**.
3	Enter the ID of a student in the **ID** field who exists in SCT Banner as a financial aid student.
4	Perform the **Next Block** function and select the Action Indicator option for an Immediate Process in the **Packaging Group Assignment** field.
5	Click in the **Term** field and select the correct term.
6	Click the **Save** icon. Note: The packaging group to which the student has been assigned is listed on the Auto Help line.
7	Click the **Exit** icon.
8	Access the Award Form (RPAAWRD).
9	Perform the **Next Block** function.
10	Select Assign Packaging Group from the **Options** menu. Result: SCT Banner will now package this student using the fund order set up on RPRGFND for the packaging group. Note: The student must have a budget assigned in order for any awards to be packaged.
11	Click the **Save** icon.
12	Click the **Exit** icon. Note: You can also perform automatic packaging from the ROAIMMP Form by choosing the Immediate option of **Packaging Fund Assignment**.

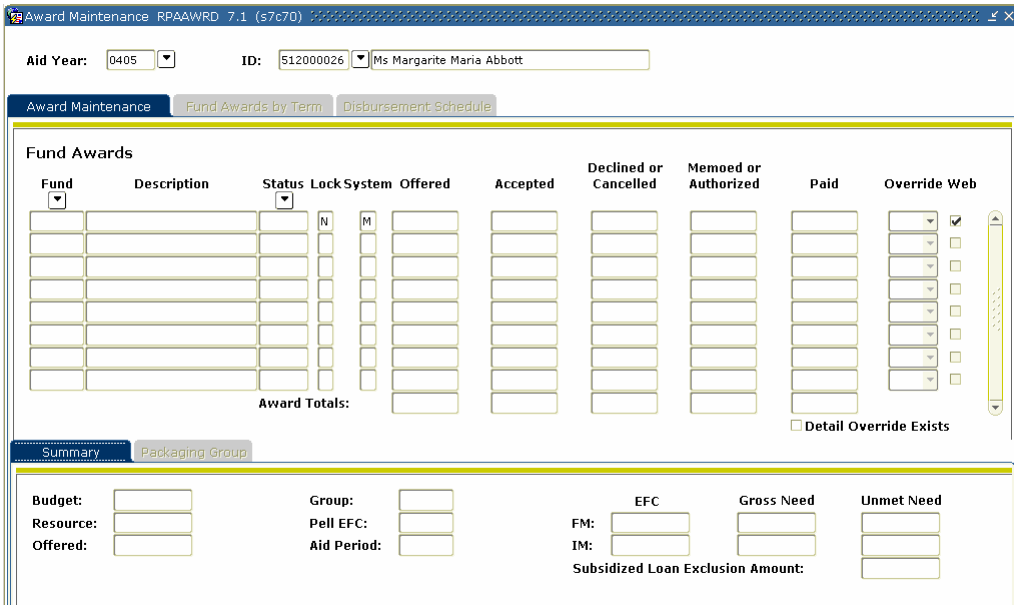
Adding a Fund Manually to an Existing Package

Introduction

You can use the Award Maintenance Form (RPAAWRD) to a fund manually to an existing package.

Example: A student has come into your office with changes that affect his/her eligibility and you have revised his/her Need Analysis and Budget. The student has already been packaged, but the changes have resulted in additional eligibility and you choose to make those changes manually.

Banner form



Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Award Maintenance Form (RPAAWRD).
2	Confirm the **Aid Year**.
3	Enter the ID of a student in the **ID** field who exists in SCT Banner.
4	Click in the **Fund** field. <u>Note</u>: Note the funds previously awarded to the student.
5	Perform an **Insert Record** function. Use the List of Values to choose an additional fund to award this student in this packaging group.
6	Click in the **Status** field and use the List of Values to select an Award Status that means 'Accepted'
7	Click in the **Offered** field and then enter an amount of the award.

Continued on the next page

Adding a Fund Manually to an Existing Package, Continued

Procedure, continued

Step	Action
8	Click in the **Accepted** field and then enter an amount. (An accepted amount cannot be entered unless the award is in an Accepted status). Note: The **System** field will display an M for manual award.
9	Continue these steps to award a variety of funds until you have completed the student's package. Click the **Save** icon when you have completed your additions.
10	Choose the Packaging Group tab.
11	The **Award Letter** check box should be checked. If it is not, click in the **Award Letter** check box in the Packaging Group tab. Select this check box for the Population Selection process to identify the student in order to send him or her an award letter.
12	Click the **Save** icon.
13	Click the **Exit** icon.

Modifying an Award Amount of an Existing Package

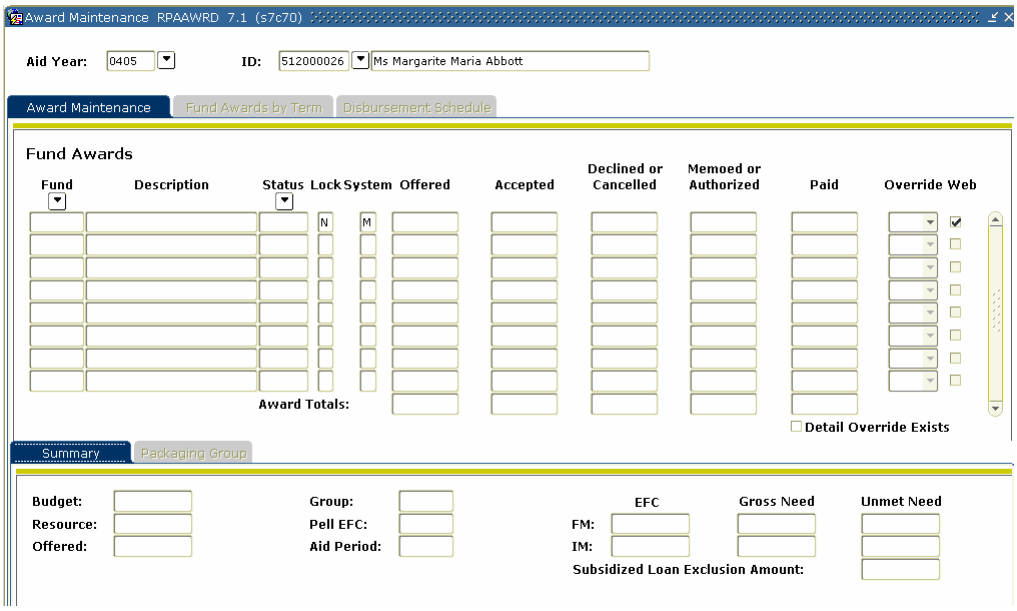
Introduction

You can also use the Award Maintenance Form (RPAAWRD) to modify an award amount of an existing package.

Example: A student has come into your office with a request to reduce the amount of loan that he/she was awarded.

Note: the same functions can be performed on the RPAAPMT and ROARMAN forms.

Banner form



Procedure 1

Follow these steps to complete the process.

Step	Action
1	Access the Award Maintenance Form (RPAAWRD).
2	Confirm the **Aid Year**.
3	Enter the ID of a student in the **ID** field who exists in Banner.
4	Click on the fund in the Fund Awards block that the student wishes to have reduced.
5	Click in the **Accepted** field for that fund and enter the amount the student wishes to accept.
6	Click on the **Save** icon. Note: The **Declined or Cancelled** field is now populated with the difference between the offered amount and the accepted amount.

Continued on the next page

Modifying an Award Amount of an Existing Package,
Continued

Procedure 2

Follow these steps to have this loan for only the first semester per the student's request.

Step	Action
1	Access the Award Form (RPAAWRD). Note: All the following functions can be performed on the RPAAPMT and ROARMAN forms.
2	Confirm the **Aid Year**.
3	Enter the ID of a student in the **ID** field who exists in Banner.
4	Perform the **Next Block** function to navigate to the Fund Awards by Term block on the RPAAWRD Form.
5	Navigate to the fund term he/she wishes to have for one semester only.
6	Move to the **Percent** field and enter 100%.
7	Move to the second term and enter 0% in its **Percent** field.
8	Click the **Save** icon. Result: The **Offered** and **Accepted** fields for the first term are for the full amount and the **Offered** and **Accepted** amounts for the second term are placed at $0.00. This also can be done by changing the offered and accepted amounts from the full award amount in the first term and 0 award amount in the second term. The percentages will change accordingly Warning: You never should change the percentages and amounts at the same time.
9	Click the **Exit** icon.

Continued on the next page

Modifying an Award Amount of an Existing Package,
Continued

Procedure 3

Follow these steps to increase an existing award.

Step	Action
1	Access the Award Form (RPAAWRD). Note: All the following functions can be performed on the RPAAPMT and ROARMAN forms.
2	Confirm the **Aid Year**.
3	Enter the ID of a student in the **ID** field who exists in Banner.
4	Perform the **Next Block** function to navigate to the Fund Awards by Term block on the RPAAWRD Form.
5	Navigate to the fund term he/she wishes to package an increase.
6	Move to the first terms offered amount and enter an increase to the terms award in both the offered and accepted amounts (if accepted).
7	Click the **Save** icon.
8	The following information window will appear: Notice Sum of award term amounts does not equal total. Do you want to repackage the award with the new total? Press Yes or No (No will cause all attempted term changes to be rolled back). Result: you now have the choice to accept the new award or roll back to the original award, upon accepting the new award the awards block will be updated with the new total award amount. Warning: you never should change the percentages and amounts at the same time.
9	Click the **Exit** icon.

Inputting Outside Resources

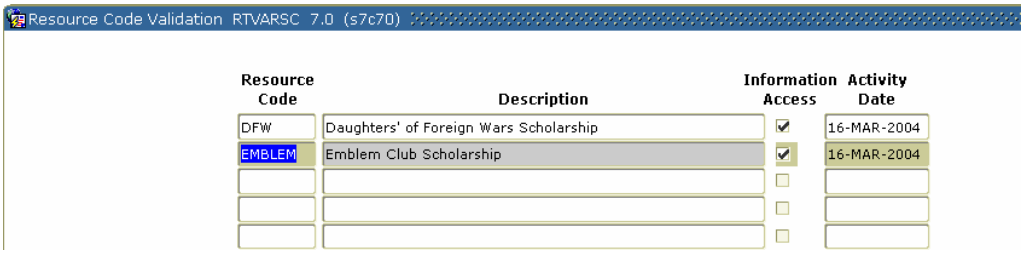
Introduction

The Resource Code Validation Form (RTVARSC) is used by the financial aid office or business office to define resources.

Example: Your school receives notification of an outside scholarship that has been awarded to ten of your students. The scholarship agency awards the scholarship to the students directly. Your organization has chosen to treat these types of scholarships as resources.

Note: Default Resource codes only need to be set up once.

Banner form



Procedure

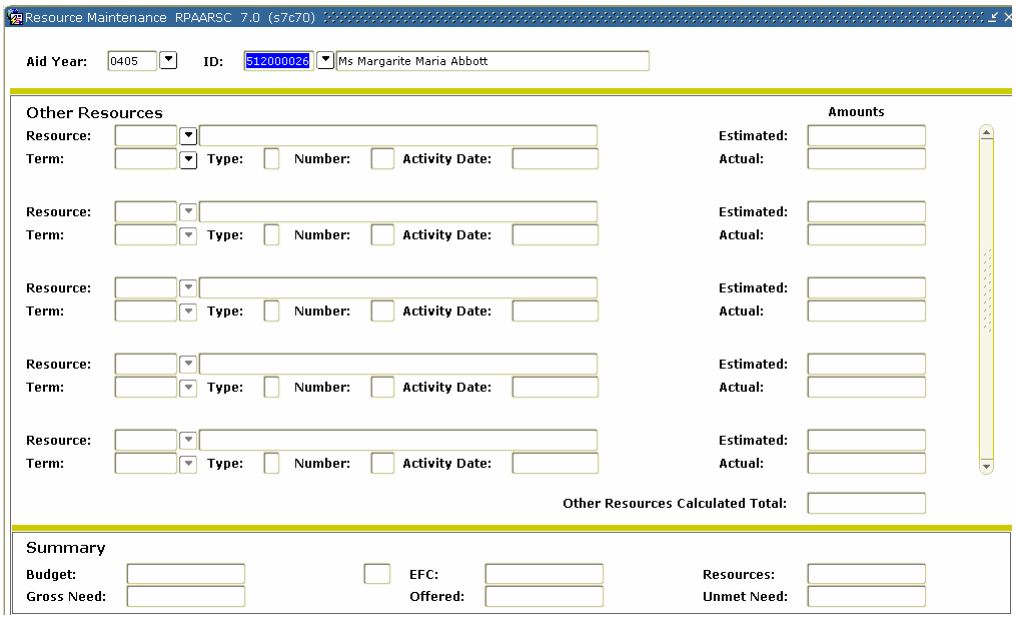
Follow these steps to complete the process.

Step	Action
1	Access the Resource Code Validation Form (RTVARSC).
2	Enter a new resource code (from 1 to 6 alphanumeric characters) in the **Resource Code** field.
3	Enter a definition of your new resource code in the **Resource Description** field.
4	Click on the **Save** icon.
5	Click on the **Exit** icon.

Continued on the next page

Inputting Outside Resources, Continued

Banner form



Procedure

Follow these steps to complete the process.

Step	Action
1	Access the Resource Form (RPAARSC).
2	Confirm the **Aid Year**.
3	Select the ID number of a student.
4	Perform a **Next Block** function to move to the Other Resources block.
5	Move to the **Resource** field and enter the code previously created. Or use the **Search** icon to search for the resource code created on RTVARSC. Result: The description is now populated.
6	Select an appropriate term for the aid year and the term for which the student received the scholarship in the **Term** field.
7	Enter the amount in the **Estimated** field and/or the **Actual** field.
8	Click on the **Save** icon.
9	Click on the **Exit** icon.
10	Review the results on the Award Form (RPAAWRD) in the **Resource** field of the Summary tab. Note: this process can be done also through the ROARMAN form.

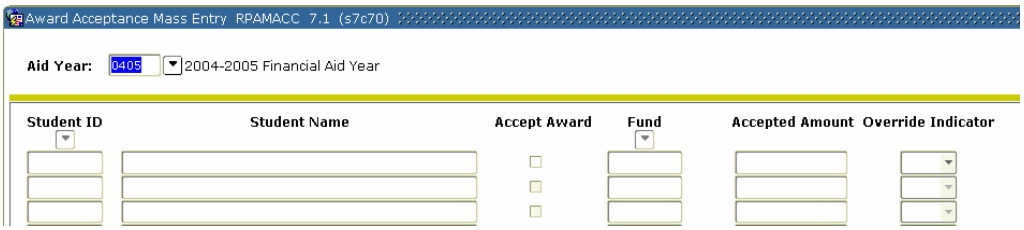
Preparing Mass Accept Awards

Introduction

The Award Acceptance Mass Entry Form (RPAMACC) enables you to enter a large number of applicant award acceptance or rejections or to accept the students entire package with one record..

Example: Your institution does not automatically accept loan or work funds when they are awarded; it sends award letters to students permitting them to accept or decline them. You want to mass process all the letters that students have returned to the financial aid office.

Banner form



Procedure 1

Follow these steps to complete the process.

Step	Action
1	Access the Award Acceptance Mass Entry Form (RPAMACC).
2	Confirm the **Aid Year**.
3	Select the **ID** of a student who has been offered a loan or work fund.
4	The **Accept Award** checkbox should be populated.
5	Click in the **Fund Code** field and enter a loan or work fund. Note: The fund should have an original Award Status of Offered.
6	Click in the **Accepted Amount** field and enter the amount the student has accepted if it is different than the amount awarded. Note: If the student accepts the full award, you do not need to enter an amount in this field; the full amount of the award will be accepted. If the student accepts the entire package you need not enter a fund code just the accept award flag, it will then accept all award that the student has that are offered.
7	Click on the **Save** icon.
8	Click on the **Exit** icon.

Continued on the next page

Procedure 1, continued.

Step	Action
9	Access the Award Form (RPAAWRD).
10	Confirm the **Aid Year**.
11	Select the **ID** of the student whose award you previously accepted on RPAMACC.
12	Perform a **Next Block** function. Note: The fund has been changed from an offered status to an accepted status.
13	Click on the **Exit** icon.
14	Access RPAMACC.
15	Confirm the **Aid Year**.
16	Select the **ID** number of a student who has been awarded a loan or work fund.
17	Remove the **Accept Award** flag.
18	Click in the **Fund Code** field and enter a loan or work fund.
19	Click on the **Save** icon.
20	Click on the **Exit** icon.
21	Access RPAAWRD.
22	Confirm the **Aid Year.**
23	Select the **ID** of the student in the previous steps.
24	Perform a **Next Block** function. Note: The student's fund has been changed from an offered status to a declined status.
25	Click on the **Exit** icon.

Additional Practice

Procedure

Using a student who has not yet been packaged, place the student into a packaging group. First, you will manually enter a fund and amount and then you will auto package the student.

Step	Action
1	Access the Award Form (RPAAWRD). Note: the same functions can be performed on the RPAAPMT and ROARMAN forms.
2	Enter the ID number of your student in the **ID** field.
3	Select the **Next Block** function.
4	Select the Packaging Group tab.
5	Double-click in the **Group** field and select a packaging group from the Packaging Group Validation Form (RTVPGRP). Note: The **Packaging Date** field enables you to maintain the packaging date for a student. The packaging program (RPEPCKG) will automatically generate this date when performed either online or in batch. Records that have the packaging date populated will not re-package if RPEPCKG is re-run in batch. Manually entering funds for a student will not generate a packaging date.
6	Click the **Save** icon.
7	Select the **Next Block** function.
8	Double-click in the **Fund** field and select a fund.
9	Double-click in the **Status** field and select a Status code.

Continued on the next page

Procedure, continued

Step	Action
10	Enter an offer amount in the **Offered** field. Note: You can optionally use the **Override** field to override any error conditions that you encounter when accepting/rejecting an award. **No** is the default. When you override error messages that apply to the student, the **Yes** option overrides the most recent error and the **All** option overrides all five error conditions: • Exceeds Unmet Need. • Outstanding Requirements. • Exceeds EFC. • Violates Fed Fund ID limits. • Violates Fund Min/Max. Students in need of a new or revised award letter must have a check manually placed in the **Award Letter** field of the Packaging Group Information section of RPAAWRD. Select this check box whenever the offered amount changes on any fund in the student's package and you want the changes to the fund to generate a new award letter (see *Section B Set up, Packaging Options and Fund Options*).
11	Click the **Save** icon. Note: Notice the Packaging Date in the Packaging Group block. This date will not populate when funds are entered manually. It is populated only after RPEPCKG is run.
12	Select Assign Packaging Group from the **Options** menu.
13	Review the award package. Note: Notice the Packaging Date in the Packaging Group block is now populated.
14	Click the **Exit** icon.

Self Check

Directions

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

Question 1

The Assign Packaging Group option on the Award Form (RPAAWRD) creates an award package for the selected student based upon the institution's

a) budgeting rules.
b) tracking rules.
c) satisfactory academic rules.
d) packaging rules.
e) fund disbursement rules.

Question 2

The Package Date field on RPAAWRD populates

a) when the students are packaged using the batch or online RPEPCKG process.
b) when the date is manually entered.
c) when a RORRULE is written to do so.
d) each time you access the RPAAWRD Form.
e) each time you manually award a fund to a student.

Question 3

When you manually assign a student to a packaging group the previous rules that have been created for packaging groups will not be referenced.

True False

Continued on the next page

Self Check, Continued

Question 4

When you assign a packaging group to a student after you save the record on the Applicant Immediate Process Form (ROAIMMP)

a) the Action Indicator field will indicate which packaging group the student has been assigned.
b) the Current Status field will indicate which packaging group the student has been assigned.
c) the Auto Help line will indicate which packaging group the student has been assigned.
d) you must go to the Award Form (RPAAWRD) to see which packaging group the student has been assigned.

Question 5

The funds that are already awarded to the student can be viewed

a) on the Summary tab on the Award Form (RPAAWRD).
b) in the Status field in the Fund Awards Window on the Award Form (RPAAWRD).
c) in the Awards Block on the RPAAWRD, RPAAPMT and ROARMAN forms
d) on the Applicant Budget Form (RBAABUD).
e) on the Applicant Immediate Process (ROAIMMP).

Question 6

If any awards have been manually added for a student, the System field will display

a) an *S*.
b) an *X*.
c) nothing in this field.
d) an *A*.
e) an *M*.

Question 7

You can determine how much a student was originally awarded on RPAAPMT by

a) the Memo'd/Authorized field.
b) the Paid field.
c) the Original Offered field
d) subtracting the Declined/Cancelled field from the Accepted field,
e) guessing the amount.

Continued on the next page

Self Check, Continued

Question 8

To designate half of an award for the fall and half for the spring, you would go to the Fund Awards by Term tab (RPAAWRD), to the Accepted field and input 50% of the award amount, and then go to the second term and input 50% of the award amount in its Accepted field.

True False

Question 9

On the Award Form (RPAAWRD) outside resources for a student are viewed in the

a) Summary tab in the Resource field.
b) Packaging Group tab in the Resource field.
c) Fund Awards by Term tab in the Resource field.
d) Enrollment window in the Resource field.
e) Disbursement Schedule tab in the Resource field.

Question 10

The initial status of the fund when you are populating the Fund Code on Award Acceptance Mass Entry Form (RPAMACC) should be

a) *Accepted*.
b) *Cancelled*.
c) *Paid*.
d) *Offered*.
e) *Declined*.

Answer Key for Self Check

Question 1

The Assign Packaging Group option on the Award Form (RPAAWRD) creates an award package for the selected student based upon the institution's

d) packaging rules.

Question 2

The Package Date field on RPAAWRD populates

a) when the students are packaged using the batch or online RPEPCKG process.

Question 3

When you manually assign a student to a packaging group the previous rules that have been created for packaging groups will not be referenced

True

Question 4

When you assign a packaging group to a student after you save the record on the Applicant Immediate Process Form (ROAIMMP)

c) the Auto Help line will indicate which packaging group the student has been assigned.

Question 5

The funds that are already awarded to the student can be viewed

c) in the Awards Block on the RPAAWRD, RPAAPMT and ROARMAN forms

Question 6

If any awards have been manually added for a student, the System field will display

e) an *M*.

Question 7

You can determine how much a student was originally awarded on RPAAWRD by

c) the Original Offered field

Continued on the next page

Answer Key for Self Check, Continued

Question 8

To designate half of an award for the fall and half for the spring, you would go to the Fund Awards by Term tab (RPAAWRD), to the Accepted field and input 50% of the award amount, and then go to the second term and input 50% of the award amount in its Accepted field.

True

Question 9

On the Award Form (RPAAWRD) outside resources for a student are viewed in the

a) Summary tab in the Resource field.

Question 10

The initial status of the fund when you are populating the Fund Code on Award Acceptance Mass Entry Form (RPAMACC) should be

d) *Offered*.

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.

Set Up Form		Day-to-Day Form(s)	
Form Name	**Code**	**Form Name**	**Code**
Packaging Options	RPROPTS		
Packaging Group Validation	RTVPGRP		
Financial Aid Selection Rules	RORRULE		
Packaging Group Fund Rules	RPRGFND		
Default Packaging Rules	RPRDEFR		
Packaging Rules	RPRPCKR		
Packaging Group Fund Source Rules	RPRFSRC		
Group Inquiry Form	ROIGRPI		

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	Set Up Forms Needed
Award Form (RPAAWRD)	• Packaging Options (RPROPTS) • Packaging Group Validation (RTVPGRP) • Financial Aid Selection Rules(RORRULE) • Packaging Group Fund Rules (RPRGFND) • Default Packaging Rules (RPRDEFR) • Packaging Rules (RPRPCKR) • Packaging Group Fund Source Rules (RPRFSRC) • Group Inquiry Form(ROIGRPI)
Financial Aid Record Maintenance (ROARMAN)	• Same as above
Package Maintenance (RPAAPMT)	• Same as above

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
RPROPTS	Packaging Options	
RTVPGRP	Packaging Group Validation	
RORRULE	Financial Aid Selection Rules	
RPRGFND	Packaging Group Fund Rules	
RPRDEFR	Default Packaging Rules	
RPRPCKR	Packaging Rules	
RPRFSRC	Packaging Group Fund Source Rules	
ROIGRPI	Group Inquiry Form	

Release Date

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