

ellucian[®]

Banner Financial Aid
Release Guide

Release 8.29.1 and 9.3.3
June 2017

Notices

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Introduction

The Banner Financial Aid 8.29.1/9.3.3 release describes recent enhancements and references to a detailed listing of resolved Change Request defects/enhancements.

Note: With the exception of some version specific terminology (form vs. page, tab vs. section, etc.), this Release Guide describes both Banner Financial Aid 8.x and 9.x implementations.

This release describes changes needed to support key enhancements and CR Defect resolutions. Enhancements include the following:

- 2016/2017 FISAP updates
- Course Program of Study updates
- COD Update to Country Codes
- Functional Miscellaneous Enhancement - Period Budgeting Aid Year Rules (RBRPBYR)

Tip: As a beta process, Ellucian has moved Banner Financial Aid product documentation out of the download package available in the Ellucian Download Center. As always, the latest product documentation is available for download from the Ellucian Support Center in the Banner Financial Aid documentation library. A file with instructions for accessing this content will be included in the TRZ package ([release_documentation_access.html](#)) for both 8.29.1 and 9.3.3.

Ellucian Solution Manager for product upgrade installation

Ellucian recommends that you use Ellucian Solution Manager to perform Banner product upgrades, rather than using a manual installation process.

With Ellucian Solution Manager, you can:

- Identify dependency information within and between products.
- View the latest version numbers for the Banner products you have installed, along with all other version numbers installed in your environment.
- Use the **Get New Releases** feature to identify available upgrades and download them immediately.
- Identify and install product pre-requisites, along with any upgrades you have selected.

Solution Manager currently supports most Banner 8 and Banner 9 products. For more information on the Banner product versions currently supported by Solution Manager, see the *Banner Upgrades Support Status* guide. For detailed instructions on how to install and configure Solution Manager, see the latest *Solution Manager User Guide*.

System Requirements

The Banner Financial Aid 8.29.1/9.3.3 release supports the baseline and localized versions of the application.

Please refer to the *Banner Administrative Pages Installation Guide 9.3.5* and the *Banner Financial Aid 9.3.3 Installation Reference* for the minimum system requirements.

Supporting resources

You can reference additional resources for more information about Banner 9 and the Financial Aid 9.3.3 release.

- *Banner Administrative Pages Installation Guide 9.3.5*

In addition to installation instructions, this installation guide provides information about how to configure the user interface. You can find this installation guide in the Banner Financial Aid documentation library in the Ellucian Support Center.

- Installation References

Each release package is accompanied by an installation reference, which is a companion to the *Banner Administrative Pages Installation Guide 9.3.5* and provides a list of prerequisites. The installation references for the Banner Financial Aid base and localization release packages are available in Ellucian Solution Manager and in the Banner Financial Aid documentation library in the Ellucian Support Center.

- *Banner Financial Aid Release Guide 8.29.1/9.3.3*

This release guide provides an overview of the Banner Financial Aid 8.29.1/9.3.3 release. You can find this release guide in the Banner Financial Aid documentation library in the Ellucian Support Center.

- *Banner 9 Sizing and Configuration Guide*

This guide provides you with details about the hardware systems that are required for Banner 9 applications and how to configure those systems. You can find this guide in the Banner 9 Sizing and Configuration documentation library in the Ellucian Support Center.

- *Application Navigator Installation Guide*

This guide provides an overview of the purpose of Application Navigator and how it works. You can find this guide in the Banner Financial Aid documentation library in the Ellucian Support Center.

- *Banner Document Management Supplement for Banner 9 Pages*

This guide provides information about the Banner Document Management (BDM) integration when accessing either ApplicationXtender Web Access or ApplicationXtender Document Manager from a Banner 9 page. It also provides information regarding some of the known differences with the BDM integration in relationship to Banner 8 forms integration. You can find this supplement in the Banner Document Management documentation library in the Ellucian Support Center.

- You can find the following guides in the Banner 9 documentation library in the Ellucian Support Center.

- *Banner Transformed: Getting Started with Your Administrative Application*
- *Banner Transformed: Branding Your Administrative Application*
- *Banner Transformed: Working with Eclipse and Your Administrative Application*
- *Banner Transformed: Extending Your Administrative Application*

Functional

This section describes changes to functional processing for this release.

2016/2017 FISAP - Functional

This section describes changes to Fiscal Operations Report and Application to Participate (FISAP) processing for this release.

Overview

The FISAP is used by institutions to apply for Campus-Based Program funding for the upcoming award year and to report Campus-Based Program expenditures for the previous award year.

Each year Title IV-eligible institutions must report the fiscal year's final campus-based aid disbursed by fund type along with the number of students receiving such aid. This reporting is done using the FISAP, which includes data from Banner Financial Aid, Banner Student, and Banner Accounts Receivable. Banner provides your institution with the two grids needed to report this campus-based data. You can then use these reports to transfer the data to the Department of Education's FISAP web site.

To be selected for inclusion in the FISAP report, a student must be a U.S. Citizen or eligible noncitizen. Also, if a need analysis calculation has been run, the student must have an official EFC.

Modifications necessary to support 2016/2017 FISAP processing were originally delivered in the Banner Financial Aid 8.29.x.x posting and re-delivered with this 8.29.1/9.3.3 release.

For 2016/2017, the Department of Education did not add any new fields to the FISAP. However, dates were incremented and text in the instructions modified.

FISAP Instructions

Use this information for reference purposes.

The following changes do not impact RORFS17:

Section	Change
The Legal Reason you Must Complete the Application to Participate	Disclosure of Estimated Burden statement has been revised.
Introduction	<ul style="list-style-type: none"> Because October 1, 2017 falls on Sunday, the due date for the FISAP has been updated to Friday, September 29, 2017. To clarify the signature requirement, a section "Who can sign the FISAP?" has been added.

Section	Change
	<ul style="list-style-type: none"> Additional information has been added concerning the rules for transferring funds between programs and the rules of carrying funds forward and back, along with a note about using the transferred or carried funds.
Part I, General Information	A section has been added "Who can sign the certification and signature pages?"
Part I, Section B	Reminders have been added concerning signature authorization.
Part II, Section A	<ul style="list-style-type: none"> A note has been updated reminding schools that beyond the 2017-2018 Award year, Federal Perkins Loans may not be awarded or disbursed. Field 1 has been revised to update information concerning the Federal Perkins Loan Level of Expenditures (LOE).
Part III, Section A	Field 34.2 Collection costs has been clarified by adding the cite.
Part III, Section C	Field 2.2 has been updated with current contact information for TPD.
Appendix A	Information concerning eligibility to receive a waiver for the FWS/ FSEOG Institutional-Share Requirement has been revised.
Appendix B	Information concerning using EDExpress to print FISAP reports has been updated.

Auto Zero EFC

Not every student with a zero EFC receives an automatic zero EFC.

The Department of Education sets an Auto Zero EFC Flag on the ISIR record if they meet certain criteria. However, when records are recalculated and manually entered into the system this status can change and the flag sent from ED is not updated within Banner.

Another indicator that the student has received an Auto Zero EFC is the Methodology Type which indicates which EFC formula was used to calculate a student's EFC. The Methodology Type is received on the initial ISIR record and is also updated correctly when changes are made to the student's record and a need analysis calculation is run. Therefore, the RORFS17 process will determine a student's Auto Zero EFC status by looking at the Methodology Type: RCRAPP2_C_1_ANLY_TYPE for Independent students and RCRAPP2_C_PAR_1_ANLY_TYPE for Dependent students.

If the Methodology Type is NULL, indicating that the institution has not run a need analysis calculation on a manual record, the income specific criteria will be reviewed for the student to determine whether or not they are eligible for an Auto Zero EFC.

The Final FISAP documentation was published on April 25, 2017 and can be found at: <https://ifap.ed.gov/fisapformandinst/1819FISAPForm.html>

New process

A new process has been included for this release.

FISAP Report for 2016-17 year (RORFS17)

The FISAP Report for 2016-17 year (RORFS17) is needed to properly generate the FISAP due on Friday, September 29, 2017.

This process has been updated to include new (2016/2017) aid year references.

FISAP definitions

This section describes calculations used for FISAP processing.

Calculation of Automatic Zero EFC

Automatic Zero EFC students are determined by the following criteria based upon 2016/2017 information.

Dependent students

Dependent Students automatically qualify for an automatic zero EFC if both item 1 and item 2 are true.

1. Anyone included in the parent's household size (as defined on the FAFSA) received benefits during 2014 or 2015 from any of the designated means-tested Federal benefit programs: the SSI Program, the Food Stamp Program, the Free and Reduced Price School Lunch Program, the TANF Program, and WIC;
OR
the student's parents filed or are eligible to file a 2015 IRS Form 1040A or 1040EZ (they are not required to file a 2015 Form 1040)*, or the parents are not required to file any income tax return;
OR
the student's parent is a dislocated worker.
AND
2. The 2015 income of the student's parents is \$24,000 or less.
 - For tax filers, use the parents' adjusted gross income from 2015 Form 1040A or 1040EZ* to determine if income is \$24,000 or less.
 - For non-tax filers, use the income shown on the 2015 W-2 forms of both parents (plus any other earnings from work not included on the W-2s) to determine if income is \$24,000 or less.

Independent students

Independent students with dependents other than a spouse automatically qualify for an Automatic Zero EFC if both of the following are true.

1. Anyone included in the student's household size (as defined on the FAFSA) received benefits during 2014 or 2015 from any of the designated means-tested Federal benefit programs: the SSI Program, the Food Stamp Program, the Free and Reduced Price School Lunch Program, the TANF Program, and WIC;

OR

the student and the student's spouse (if the student is married) each meet one of the following conditions: filed or is eligible to file a 2015 IRS Form 1040A or 1040EZ or is not required to file any income tax return;

OR

the student (or the student's spouse, if any) is a dislocated worker.

AND

2. The student's (and spouse's) 2015 income is \$24,000 or less.
 - For tax filers, use the student's (and spouse's) adjusted gross income from 2015 Form 1040A or 1040EZ* to determine if income is \$24,000 or less.
 - For non-tax filers, use the income shown on the student's (and spouse's) 2015 W-2 forms (plus any other earnings from work not included on the W-2s) to determine if income is \$24,000 or less.

Note: An independent student without dependents other than a spouse is not eligible for an automatic zero EFC.

Institutions have different uses for manual records. Some institutions may use them in lieu of EDE records and want to include them in their FISAP reporting. Banner will calculate the FISAP Total Income for manual records without a need analysis calculation, but there are certain mandatory field requirements the institution must input for the student to be a part of the FISAP calculation. This is outlined in the income information described in the *Calculation of FISAP Total Income* section, below. Some institutions will want partial MANUAL records in the FISAP reporting and some will not want any. Regardless of the scenario, the information outlined in the *Calculation of FISAP Total Income* section should be used to ensure valid results.

One of the following 2015 income tax forms may be filed as an alternative to filing a Form 1040A or 1040EZ:

- The income tax return required by the tax code of the Commonwealth of Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Republic of the Marshall Islands, the Federated States of Micronesia, or Palau.
- Applicants who are not required to complete an IRS Form 1040, but do so solely to claim an educational tax credit are considered eligible if they meet all the other requirements for the simplified EFC formulas.

Calculation of FISAP Total Income

FISAP Total Income (TI) is calculated for Dependent and Independent students.

Note:

Each of the calculations in this section use the following common variables:

- UI (Untaxed Income) = Tax-Deferred Pensions + IRA and Keogh Deductions + Child Support Received + Tax-Exempt Interest + Untaxed IRA Distributions + Untaxed Pensions + Military and Clergy Allowance + VA Non-Education Benefits + Other Untaxed Income
- AFI (Additional Financial Information) = Education Tax Credits + Child Support Paid + Need Based Employment + Grant and Scholarship Aid + Combat Pay + Co-op Earnings

Dependent student

Dependent student values.

Total Income (TI)

Status	Description
Tax Filer	If parents' tax filing status is tax filer, the following information is used to determine Total Income: Parents' Adjusted Gross Income + (UI) - (AFI) = TI
Non-Tax Filer	If parents' tax filing status is non-tax filer, the following information is used to determine Total Income: Father's Income + Mother's Income + (UI) - (AFI) = TI

Student's Total Income (STI)

Note:

Each of the calculations in this section use the following common variables:

- UI (Untaxed Income) = Tax-Deferred Pensions + IRA and Keogh Deductions + Child Support Received + Tax-Exempt Interest + Untaxed IRA Distributions + Untaxed Pensions + Military and Clergy Allowance + VA Non-Education Benefits + Other Untaxed Income
- AFI (Additional Financial Information) = Education Tax Credits + Child Support Paid + Need Based Employment + Grant and Scholarship Aid + Combat Pay + Co-op Earnings

Status	Description
Student Tax Filer	If the student's tax filing status is tax filer, the following information is used to determine Student Total Income: Student's Adjusted Gross Income + (UI) - (AFI) = STI
Student Non-Tax Filer	If the student's tax filing status is non-tax filer, the following information is used to determine Student Total Income: Student's Income + (UI) - (AFI) = STI

Dependent Student FISAP Total Income (FTI)

$$TI + STI = FTI$$

Independent student

Independent student values.

Total Income (TI)

Note:

Each of the calculations in this section use the following common variables:

- UI (Untaxed Income) = Tax-Deferred Pensions + IRA and Keogh Deductions + Child Support Received + Tax-Exempt Interest + Untaxed IRA Distributions + Untaxed Pensions + Military and Clergy Allowance + VA Non-Education Benefits + Other Untaxed Income
- AFI (Additional Financial Information) = Education Tax Credits + Child Support Paid + Need Based Employment + Grant and Scholarship Aid + Combat Pay + Co-op Earnings

Status	Description
Student Tax Filer	If student's tax filing status is tax filer, the following information is used to determine Total Income: Student's Adjusted Gross Income + (UI) - (AFI) = TI
Student Non-Tax Filer	If student's tax filing status is non-tax filer, the following information is used to determine Total Income: Student's Income + Spouse's Income + (UI) - (AFI) = TI

Independent Student FISAP Total Income (FTI)

$$TI = FTI$$

Manual records creation without FAFSA

The FISAP depends on the student’s dependency status, tax filing status and income being reported in Banner Financial Aid.

If you have created student records by just entering the student’s EFC on the **2016/2017 Need Analysis Result (RNARS17)** so that the student is packaged, then Banner doesn’t have sufficient data to accurately place or count the student in the two income grids. At a minimum, you must enter the following on the **2016/2017 Need Analysis (RNANA17)**:

Dependent Students	Independent Students
Parent Tax Return Filed	Student Tax Return Filed
Parent Tax Return Type Form Filed	Student Tax Return Type Form Filed
Parent Eligible to File 1040A/EZ	Student Eligible to File 1040A/EZ
First Bachelor’s Degree by 01-JULY-2016	Student Have Children You Support
Parent AGI or wages	Student Have Legal Dependents
Parent SSI	First Bachelor’s Degree by 01-JULY-2016
Parent Food Stamps	Student and spouse AGI or wages
Parent Free or Reduced Lunch	Student SSI
Parent TANF	Student Food Stamps
Parent Dislocated Worker	Student Free or Reduced Lunch
Parent WIC	Student TANF
Parent Additional Financial Information <ul style="list-style-type: none"> • Education Tax Credits • Child Support Paid • Need Based Employment • Grant and Scholarship Aid • Combat Pay • Co-op Earnings 	Student Dislocated Worker
	Student WIC
	Student Additional Financial Information <ul style="list-style-type: none"> • Education Tax Credits • Child Support Paid • Need Based Employment • Grant and Scholarship Aid

Dependent Students	Independent Students
	<ul style="list-style-type: none"> • Combat Pay • Co-op Earnings
Parent Untaxed Income <ul style="list-style-type: none"> • Tax-Deferred Pensions • IRA and Keogh Deductions • Child Support Received • Tax-Exempt Interest • Untaxed IRA Distributions • Untaxed Pensions • Military and Clergy Allowance • VA Non-Education Benefits • Other Untaxed Income 	
	Student Untaxed Income <ul style="list-style-type: none"> • Tax-Deferred Pensions • IRA and Keogh Deductions • Child Support Received • Tax-Exempt Interest • Untaxed IRA Distributions • Untaxed Pensions • Military and Clergy Allowance • VA Non-Education Benefits • Other Untaxed Income • Other Non-Reported Money

Also, for these records dependency may be directly entered on the **Applicant Override (RNAOV17)**, FM-Student Dependency.

Common Origination and Disbursement (COD) Update

This section describes a recent COD Country Code update for this release.

Country Code Update

The COD Technical Reference Manual was updated in May 2017 to add four new country codes. This release provides the necessary information to begin using these new country codes when submitting records to COD.

Two of the new country codes were previously used and expired in September 2008. These two codes have been updated in COD Nation Code Rules (RTVCDNT) to reflect the new country **Descriptions** in addition to setting the **Crosswalk Code** and **Inactive Date** to NULL.

Note: Ellucian recommends that you review the nations defined on STVNATN and update the Crosswalk Code on RTVCDNT, as necessary for these new and updated country codes.

RTVCDNT has been updated to reflect the new country codes:

Code	Old Description	New Description	Crosswalk Code	Inactive Date
CW	ARUBA	CURACAO	Set to NULL	Set to NULL
SX	UNION OF SOVIET SOC REP	SINT MAARTEN	Set to NULL	Set to NULL

New records inserted:

Code	Description	Crosswalk Code	Inactive Date
BQ	BONAIRE	NULL	NULL
SS	SOUTH SUDAN	NULL	NULL

Course Program of Study (CPoS)

The Banner Student 8.12 release delivered enhanced CPoS functionality.

Overview

These Banner Student 8.12 CPoS enhancements address specific federal regulations. Current regulations allow a previously passed course, as part of a student's program of study, to be included in the enrollment calculation for federal aid. Under the regulation, the student is permitted one repeat of a previously passed course.

The regulation also allows individual schools to set enrollment rules to determine the number of repeats permitted for state or institutional requirements.

These changes to Banner Student CPoS functionality also require adjustments to Banner Financial Aid functionality for this release.

Enhanced Functionality

To meet current federal regulations, the Banner Financial Aid enrollment calculation has been updated to consider a course that is part of an In Program Repeat as in the student's program of study and then determine course eligibility, based upon the number of repeats and repeat criteria for the enrollment rule.

Changed page

One page is changed for the Banner Financial Aid 8.29.1/9.3.3 release.

Financial Aid Enrollment (ROAENRL)

The ROAENRL page has been modified for this release.

The Enrollment by Course window

The **In Program Repeat** check box has been added to display the value of the ROTSREG_IN_PROGRAM_REPEAT_IND column.

When selected, the course is determined as a Repeated Course that is in the Program.

Note: The field order of the 8.x version of this page is adjusted to incorporate the **In Program Repeat** check box.

Functional Miscellaneous Enhancements

This section describes functional miscellaneous enhancements included in this release.

Changed page

One page is changed for this release.

Period Budgeting Aid Year Rules (RBRPBYR)

The Period Budgeting Aid Year Rules (RBRPBYR) has been changed for this release.

Note: Only the Banner 9 version of RBRPBYR is updated for this release. No Banner 8 changes are associated with RBRPBYR for this release.

Budget Components section

The Budget Components section of the RBRPBYR page has been updated to enhance page usability.

A pair of new buttons allow you to choose between two different data views:

- Multiple Records
- Single Record

The **Multiple Records** option (default) lists all available records for display or editing. The **Single Record** option, when selected, allows you to display or edit a complete row (for a single record).

Technical

This section describes technical changes for this release.

2016/2017 FISAP - Technical

This section describes the technical changes that support the FISAP processing.

Required data

This section describes required data provided with this release.

The following tables are updated to support changes for the 2017/2018 aid year:

- Parameter Validation Table (GJAPVAL)
- Report/Process Definition Table (GJBJOBS)
- Parameter Definition Table (GJBPDEF)
- Default Parameter Table (GJBPDFT)
- General Object Base Table (GUBOBS)

Note: You must execute these scripts as part of the Banner Financial Aid 8.29.1/9.3.3 installation to ensure that correct values exist in the table before user processing.

Data script	Description
<code>rgjbpvali_08290x0x.sql</code>	Adds Parameter Validation Table (GJBPVAL) entries for the new FISAP Report for 2016/2017 year (RORFS17) process.
<code>rgjbjobsi_08290x0x.sql</code>	Adds Report/Process Definition Table (GJBJOBS) entries for the 2016/2017 FISAP (RORFS17) process.
<code>rgjbpdefi_08290x0x.sql</code>	Adds Parameter Definition Table (GJBPDEF) entries for the new FISAP Report for the 2016/2017 year (RORFS17) process.
<code>rgjbpdfti_08290x0x.sql</code>	Adds Default Parameter Table (GJBPDFT) entries for the new FISAP Report for the 2016/2017 year (RORFS17) process.
<code>rgubobjsi_08290x0x.sql</code>	Adds General Object Base Table (GUBOBS) entries for the new FISAP Report for the 2016/2017 year (RORFS17) process.

Common Origination and Disbursement (COD)

This section describes the technical changes that support COD updates for this release.

Required Data

The COD Nation Code Rules Table (RTVCDNT) table is updated to support recent Country Code changes. As part of this update, the `rtvcdntu_082901.sql` and `rtvcdnti_082901.sql` scripts are included to update Country Code data for RTVCDNT.

Course Program of Study (CPoS)

This section describes the technical changes that support CPoS modifications in the Banner Financial Aid 8.29.1/9.3.3 release.

Changed table

One table is modified for this release.

The ROTSREG temporary table has been updated to include the `ROTSREG_IN_PROGRAM_REPEAT_IND` column (In Program Repeat) for use by the enrollment calculation to determine financial aid eligibility, in conjunction with Course Program of Study.

Changed package

A changed package has been included with this release.

ROKMISC_RULES Package

This package has been updated to support changes delivered with this release.

Package	Specification	Body
ROKMISC_RULES	<code>rokmisc_rules0.sql</code>	<code>rokmisc_rules1.sql</code>

Functions

Updates to internal functions within the `ROKMISC_RULES` package provides the necessary logic to determine In Program Repeat status.

Updated logic

If **Use Only Courses in Program** is selected (Y) on **Enrollment Rules (ROENRR)** Rules Section:

-
- If **In Program** or **In Program Repeat** is selected (Y):
 - **Count in Aid** is Y, include
 - **Count in Aid** is N, do not include
 - **Count in Aid** is D (does not exist), include (logic defaults to value of **In Program** or **In Program Repeat** defined as Y).
 - If **In Program** is Y and **In Program Repeat** is D (does not exist):
 - **Count in Aid** is Y, include
 - **Count in Aid** is N, do not include
 - **Count in Aid** is D (does not exist), include (logic defaults to value of **In Program** defined as Y).
- Note:** If the **Count in Aid** column does not exist,
- If **In Program** is N and **In Program Repeat** is D or does not exist, do not include.
 - If **In Program** is N and **In Program Repeat** is N, do not include.

Resolutions

For more information about defect corrections in this release, see the Banner Financial Aid 8.29.1/9.3.3 Resolutions Report.

A Resolution Report lists the resolved change requests for a release. Each change request has a Problem, Impact, and Resolution statement. In addition to these statements, every change request has a URL. By copying and pasting the URL into a web browser, you can see more detail about the change request on the Ellucian Support Center.

The Resolution Report for Banner Financial Aid 8.29.1/9.3.3 can be found in the Ellucian Support Center Documentation Libraries under Banner Financial Aid.

Appendix A - Course Program of Study Calculation Examples

This appendix describes common calculation examples associated with In Program Repeat functionality introduced in this release.

Overview

The BannerStudent 8.12 Release delivered the concept of "In Program Repeats." This functionality provides the ability, when using CAPP and "Perform In Program Processing," to identify whether or not a course that is repeated is included in the student's current program. An option to perform "Include Program Repeats" has been added to Course Program of Study Control (SFACPSC). Additionally, a new field has been added to Student Course Evaluation Audit (SFASCRE), **In Program Repeat**, to indicate (selected = Yes, cleared = No) if the course is included in the student's current program, as determined by the Course Program of Study (SFPCPOS) process.

Note: Refer to the *Banner Student 8.12 Release Guide* for additional information.

This Banner Financial Aid release includes updates to the financial aid enrollment calculation. These updates use the value returned by the Course Program of Study (SFPCPOS) process for **In Program Repeat** to determine if a course is included in the student's program when it is repeated.

If a rule, defined on Enrollment Rules (ROENRR), is set to **Use Only Courses In Program**, the financial aid enrollment calculation looks for a value of Y (Yes) in either the **Count in Program** or **In Program Repeat** on SFASCRE (SFRSCORE table) to determine if the course counts in program. The repeat coursework logic then determines whether the course should be included in the calculation for the enrollment rule.

If you are using the **Perform Count For Aid Processing** option on SFACPSC, either **Count in Program** or **In Program Repeat** and **Count In Aid** must be Y (Yes) to consider the course as in the student's program.

Note: Refer to the *Banner Student 8.10.3* and *Banner Financial Aid 8.27* release guides for additional information on **Count for Aid** processing.

Example Calculations - In Program and In Program Repeats

This section describes common Course Program of Study situations.

Example 1 - Use only Courses in Program with In Program Repeat and Count for Aid processing applied

Settings on Course Program of Study Control (SFACPSC).

Course Program of Study Control (SFACPSC)

SFACPSC	
Perform Repeat Processing	Y
Perform Count for Aid Processing	Y
Perform In Program Processing	Y
Include Program Repeats	Y

Enrollment Rules (ROENRR)

Apply these settings on ROENRR to enable the enrollment rule to count courses that are repeated in the student's program for financial aid eligibility.

Enrollment Rule	
Use Repeat Course Checking	Y
Count Withdrawal Status as Repeat Attempt	Y or N
Repeats Allowed	1
Attendance Must be Verified	N
Exclude Remedial Courses	N
Apply Remedial Limit	N
Exclude ESL Courses	Y
Use Only Courses in Program	Y

The student is enrolled in two programs, where one is an eligible program for financial aid major and one program is not an eligible program for financial aid major.

Displayed on SFASCRE

Course	Repeat Count	Repeat Without Withdrawal	Count for Aid	Count in Program	In Program Repeat
ENG 500	0	0	Y	Y	N
MATH 100	1	1	Y	N	Y
IT 111	1	1	N	N	Y

Schedule window on ROAENRL

Course	Hours	Withdrawn As Repeat Counted	Withdrawn As Repeat Not Counted	Attend. Verified	Counts In Program	In Program Repeat	Remedia Hours	Remedia Hours	ESL
ENG 500	3	0	0	N	Y	N	N	0	N
MATH 100	3	1	1	N	Y	Y	N	0	N
IT 111	2	1	1	N	N	Y	N	0	N

Example 1 Result

Total hours for the Enrollment rule = 6.

- ENG 500 is included in the student's program and included in the major eligible for financial aid.
- MATH 100 is not included in the student's program (SFASCRE) but was identified as a Repeat course. The CAPP process determined the MATH 100 class is not part of the student's program because it is a repeated course. However, the Course Program of Study process (SFPCPOS) determined the course being repeated is included in the student's program and the Count For Aid rule determined the associated major is financial aid eligible. Therefore, the course is considered eligible for this Enrollment Rule. Financial aid will set the **Counts in Program** indicator to Y in addition to the **In Program Repeat** indicator.
- IT 111 is not included in the student's program (SFASCRE) but was identified as a Repeat course. The CAPP process determined the IT 111 class is not part of the student's program because it is a repeated course. However, the Course Program of Study process (SFPCPOS) determined the course being repeated is included in one of the student's programs and the Count For Aid rule determined the associated major is not financial aid eligible. Therefore, the course is not considered eligible for this enrollment rule. Financial aid will display

the course as an **In Program Repeat** and the **Counts in Program** indicator will be N because the course is not part of an eligible major.

Example 2 - Use only Courses in Program with In Program Repeat applied and Count for Aid not applied

Settings on Course Program of Study Control (SFACPSC).

Course Program of Study Control (SFACPSC)

SFACPSC	
Perform Repeat Processing	Y
Perform Count for Aid Processing	N
Perform In Program Processing	Y
Include Program Repeats	Y

Enrollment Rules (ROENRR)

Apply these settings on ROENRR to count courses that are repeated in the student's program for financial aid eligibility and you are not using Count for Aid processing.

Enrollment Rule	
Use Repeat Course Checking	Y
Count Withdrawal Status as Repeat Attempt	Y or N
Repeats Allowed	1
Attendance Must be Verified	N
Exclude Remedial Courses	N
Apply Remedial Limit	N
Exclude ESL Courses	N
Use Only Courses in Program	Y

The student is enrolled in one program and the Count for Aid processing is not being used. The student is enrolled in course that is not part of the enrolled program.

Displayed on SFASCRE

Course	Repeat Count	Repeat Without Withdrawal	Count for Aid	Count in Program	In Program Repeat
ENG 500	0	0	Disabled	Y	N
MATH 100	1	1	Disabled	N	Y
IT 111	1	1	Disabled	N	N

Schedule window on ROAENRL

Course	Hours	Withdraw As Repeat Counted	Withdraw As Repeat Not Counted	Attend. Verified	Counts In Program	In Program Repeat	Remedia Hours	Remedia Hours	ESL
ENG 500	3	0	0	N	Y	N	N	0	N
MATH 100	3	1	1	N	Y	Y	N	0	N
IT 111	2	1	1	N	N	N	N	0	N

Example 2 Result

Total hours for the Enrollment rule = 6.

- ENG 500 is included in the student's program.
- MATH 100 is not included in the student's program (SFASCRES). The CAPP process determined the MATH 100 class is not part of the student's program because it is a repeated course. However, the Course Program of Study process (SFPCPOS) determined the course being repeated is included in the student's program; because **Count for Aid** processing was disabled, the value for **Count for Aid** will default to Y (internal processing) if **Counts in Program** or **In Program Repeat** equal Y. Therefore, the course is considered eligible for this Enrollment Rule. Financial aid will set the **Counts in Program** indicator to Y in addition to the **In Program Repeat** indicator.
- IT 111 is not included in the student's program (SFASCRES). The CAPP process determined the IT 111 class is not part of the student's program. The Course Program of Study process (SFPCPOS) determined the course being repeated is not included in the student's program. Therefore, the course is not considered eligible for this enrollment rule. Financial aid will display the course does not Count in Program or an In Program Repeat.

Example 3 - Use only Courses in Program with In Program Repeat not applied

Settings on Course Program of Study Control (SFACPSC).

Course Program of Study Control (SFACPSC)

SFACPSC	
Perform Repeat Processing	Y
Perform Count for Aid Processing	N
Perform In Program Processing	Y
Include Program Repeats	N

Enrollment Rules (ROENRR)

The following is an example of the settings on ROENRR and results on ROAENRL where **Use Only Courses in Program** is selected but the **Include Program Repeats** on SFACPSC is not being used.

Enrollment Rule	
Use Repeat Course Checking	Y
Count Withdrawal Status as Repeat Attempt	Y or N
Repeats Allowed	1
Attendance Must be Verified	N
Exclude Remedial Courses	N
Apply Remedial Limit	N
Exclude ESL Courses	N
Use Only Courses in Program	Y

The student is enrolled in one program and the Count for Aid processing and In Program Repeat are not being used. The student is enrolled in course, IT 111, that is not part of the student's enrolled program. Although Math 100 is a course that is part of the student's program, CAPP will indicate it is not part of the program because it is In Progress.

Note: If you have not applied the Banner Student 8.12 release which delivered the In Program Repeat functionality, the financial aid enrollment calculation will return the results below on ROAENRL.

Displayed on SFASCRE

Course	Repeat Count	Repeat Without Withdrawal	Count for Aid	Count in Program	In Program Repeat or field does not exist
ENG 500	0	0	Disabled	Y	Disabled
MATH 100	1	1	Disabled	N	Disabled
IT 111	1	1	Disabled	N	Disabled

Schedule window on ROAENRL

Course	Hours	Withdraw As Repeat Counted	Withdraw As Repeat Not Counted	Attend. Verified	Counts In Program Repeat	In Program Repeat	Remedia Hours	Remedia Hours	ESL
ENG 500	3	0	0	N	Y	N	N	0	N
MATH 100	3	1	1	N	N	N	N	0	N
IT 111	2	1	1	N	N	N	N	0	N

Example 3 Result

Total hours for the Enrollment rule = 3.

- ENG 500 is included in the student's program.
- " MATH 100 is not included in the student's program but was identified as a Repeat course. The CAPP process determined the MATH 100 class is not part of the student's program because it is being repeated. The Course Program of Study process (SFPCPOS) determined In Program Repeat was not being used or the column does not exist (have not applied Banner Student 8.12 release). Therefore, the course is not considered eligible for this enrollment rule.
- IT 111 is not included in the student's program. The Course Program of Study process (SFPCPOS) determined In Program Repeat was not being used or processing for In Program Repeat does not exist. Therefore, the course is not considered eligible for this enrollment rule.