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## Banner Financial Aid

Year-Round Pell Processing  
NMSFAA  
April 1, 2010

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### Introduction

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- **Financial Aid Senior Functional Consultant**
- **20 years with Higher Education**
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### Agenda

- **Phase 1**
  - Year-Round Pell
  - Set-Up
  - Day-to-Day Processing
- **Phase 2**
  - New Functionality – 8.7 Release
  - April 2010

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# Year-Round Pell



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## What is Year Around Pell?

The Higher Education Opportunity Act (HEOA) of 2008 authorized the awarding of up to two Federal Pell Grants within an academic year. Banner Financial Aid Releases 7.14.1 and 8.4.2 provided Phase 1 which allows up to 200% of a scheduled Federal Pell Grant award within an academic year.



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## Overview of Year Round Pell Phase I

- Delivered in June 2009
- RTVAPRD
  - Updated edit on Pell Full Year percentage to allow up to 200% to be entered
- RPAAWRD/RPAAPMT/ROAPELL
  - Added the Additional Eligibility Indicator which gets automatically checked when a student is above 100% of the scheduled Pell Grant for the aid year
- RNASL10
  - Updated the edit on the Pell Percent Scheduled Used so that up to 200% can be entered on a Manual record
- REAOR10
  - Added Additional Eligibility Indicator
  - Modified edit on the Amount Due to Student field to check the Pell Maximum limit \* 2



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# PHASE 1 SET-UP



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## RTVAPRD – AID PERIOD VALIDATION

Aid Period Validation RTVAPRD 8.4.2 (C800)

Code	Description	Budget Full Year Percent	Pell Full Year Percent	Grant Full Year Percent	EFC Percent
FSPSU	Fall-Spring-Summer	125	150	100	100
FSS1S2	Fall-Spr-Summ 1- Summ2	150	200	100	100

Pell Full Year Percent allows up to 200% value.  
Grant Full Year Percent value caps at 100%



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## RFRDEFA – Default Award and Disbursement Schedule Rules

Aid Year: 0910 Aid Year 2009-2010      Aid Period: FSPSU


### Award Schedule

Term Code	Award Percent	Grant Award Percent	Memo Expiration Date	Activity Date
201010	33.333	50	15-SEP-2009	07-OCT-2009
201020	33.333	50	15-JAN-2010	07-OCT-2009
201030	33.334	50	15-JUN-2009	07-OCT-2009

\*\* Press INSERT RECORD to default an Award Schedule \*\*

### Disbursement Schedule

Term Code	Disbursement Percent	Disbursement Date	+/- Days	Activity Date
201010	100	10-SEP-2009		07-OCT-2009
201020	100	20-JAN-2010		07-OCT-2009
201030	100	17-MAY-2010		07-OCT-2009



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# Day-to-Day Processing



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## Banner and Year-Round Pell

- First Pell still awards for less than half-time and will award all remaining eligibility before reviewing for second Pell award.
- Pell calculation will not award the second Pell if student is not expected to be at least half time for the term.
- Pell calculation looks for the award amount greater than 100% according to the EFC to update the Additional Eligibility Indicator



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## Additional Eligibility Indicator

- When Pell calculates during the RPEPELL process, it determines if the scheduled Pell amount is above 100%, if so it will check the Additional Eligibility Indicator on RPAAWRD, RPAAPMT, ROARMAN and ROAPELL.
- The Additional Eligibility Indicator cannot be updated (checked = Y and unchecked = N) manually on the forms listed above.



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## ROAPELL – Applicant Pell Grant

**Applicant Pell Grant Status**

Primary Pell EFC: <input type="text" value="0"/>	Secondary Pell EFC: <input type="text" value="0"/>
Primary SAR EFC: <input type="text" value="18,354.00"/>	Secondary SAR EFC: <input type="text" value="0"/>
Pell Budget: <input type="text" value="18,354.00"/>	SAR Certified Date: <input type="text" value="20010902"/>
Pell Cost of Attendance: <input type="text" value="18,354.00"/>	SAR ID: <input type="text" value="ED"/>
Less Than Half Time COA: <input type="text" value=""/>	Transaction Number: <input type="text" value="01"/>

Scheduled Award: <input type="text" value="6,250.00"/>
Expected Disbursement: <input type="text" value="8,025.00"/>
Amount Paid to Date: <input type="text" value="0.00"/>

Additional Eligibility Indicator  
 Auto Zero EFC

Indicator cannot be updated manually.

**Verification**

Verification Message: <input type="text" value="S"/>	<input type="checkbox"/> Lock Pell Disbursement
Status: <input type="text" value="(None)"/>	<input type="checkbox"/> Lock ACG Disbursement
Complete: <input type="text" value="N"/>	<input type="checkbox"/> Lock SMART Disbursement

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## REROR10 Grant Origination Creation

- When the Grant Origination Create process is run (REROR10) it also reviews RPAAWRD for the Additional Eligibility Indicator and if it exists it updates the Additional Eligibility Indicator on the REAOR10 Grant Origination/Acknowledgement form.

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## REAOR10 Grant Origination/Acknowledgement

- The Additional Eligibility Indicator on the Origination record can be manually updated.
- This will alert COD upon the extraction of the record, that this student is eligible for a second scheduled award.
- When the Acknowledgement record is accepted and loaded into Banner it also has the Additional Eligibility Indicator field loaded.

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## Semester Examples

- The next examples refer specifically to the receipt of 200% Pell award, but the scenarios would also hold true for a student who was eligible to receive only 150% (they would only be eligible for up to 1/2 the second award since they are only attending three terms instead of four as used in the examples).



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## Semester Example 1

- Aid period SUMMER/FALL/SPRING/SUMMER = 200%
- FTFY award is \$4000; Expected enrollment - All terms = FT
- Awarded \$8000 (\$2000 for each term)
- Enrollment at disbursement:
  - Summer FT award = \$2000 - Disbursed
  - Fall < 1/2 time award = \$500 - Disbursed - eligible since it is part of the first Pell award
  - Spring FT award = \$2000 - Disbursed (\$1500 first Pell, \$500 second Pell)
  - Summer FT award = \$2000 - Disbursed
- Total award paid = \$6500. All terms are disbursable



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## Semester Example 2

- Aid period SUMMER/FALL/SPRING/SUMMER = 200%
- FT award is \$4000; Expected enrollment - All terms = FT
- Awarded \$8000 (\$2000 for each term).
- Enrollment at disbursement:
  - Summer FT award = \$2000 - Disbursed
  - Fall FT award = \$2000 - Disbursed
  - Spring < 1/2 time = \$500- REJECT, since it's part of the 'second' award and 'second' Pell awards can only be disbursed if enrolled 1/2 time or greater.
  - Summer FT award = \$2000 - Disbursed
- Total Pell Paid \$6000



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### Semester Example 3

- Aid period SUMMER/FALL/SPRING/SUMMER = 200%. FT award = \$4000 ; Expected enrollment - All terms = FT
- Enrollment at disbursement:
  - Summer <1/2 time award = \$500 - Disbursed
  - Fall FT award = \$2,000 - Disbursed
  - Spring FT award = \$2,000 - Disbursed (\$1,500 first award. \$500 second award)
  - Summer 1/2 time award = \$1,000 - Disbursed
  - If enrollment was < 1/2 time in second summer then would get \$0 (reject since part of second award)
- Total Pell paid \$5500



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### Semester Example 4

- Aid period SUMMER/FALL/SPRING/SUMMER = 200%. FTFY award = \$4000.
- Enrollment at time of disbursement:
  - Summer < 1/2 time award = \$500 - Disbursed
  - Fall < 1/2 time award = \$500 - Disbursed
  - Spring < 1/2 time award = \$500 - Disbursed
  - Summer < 1/2 time award = \$500 - Disbursed
- Total Pell paid \$4000 – in this example it would never reach the second pell award



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### Semester Example 5

- Aid period SUMMER/FALL/SPRING/SUMMER = 200%. FTFY award = \$4000.
- Enrollment at time of disbursement:
  - Summer 1/2 time award = \$1,000 - Disbursed
  - Fall FT award = \$2,000 - Disbursed
  - Spring FT award = \$2,000 (\$1,000 from first year and \$1,000 from second year) - Disbursed
  - Summer 1/2 time award = \$1,000 - Disbursed
- Total Pell Paid \$6000



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### Semester Example 6 – Transfer Student

- Student transfers into school in Spring semester. RNASL10 record indicates that student received 45% of \$4,000 = \$1,800 Pell award.
- At time of Disbursement:
  - Spring FT award = \$2,000 - Disbursed
  - Summer FT award = \$2000 - Disbursed (remaining first award amount \$200 and \$1,800 second award amount)
- Total Pell Paid \$6000 and \$1800 at prior school

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### Semester Example 7 – Transfer Student

- Student transfers in Fall after receiving Pell during summer at prior school which is part of current academic year at new school. RNASL10 record shows received 25% of \$4,000 Pell award = \$1,000 at prior school.
- At time of Disbursement:
  - Fall FT award = \$2,000 - Disbursed
  - Spring FT award = \$2,000 - Disbursed (\$1,000 remaining first award amount and \$1,000 second award)
  - Summer < 1/2 time award = \$0 - REJECT since student into second award amount and must be enrolled >= 1/2 time
    - If the student was 1/2 time in Summer then would get \$1,000, if 3/4 time would get \$1,500, if FT would get \$2,000
- Total Pell Paid \$4000 and \$1000 at prior School

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### PHASE 2

- Release 8.7 – April 2010 Release
- Expanded functionality to Year-Round Pell Grant processing with Banner Financial Aid
  - Crossover summer aid periods and the ability to assign a summer session to multiple academic years for Pell purposes
  - Awarding the most beneficial Pell payment for cross-over periods
  - Awarding a second scheduled Pell award only when at least one credit hour is being taken in the next academic period

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### Academic Year Rules

- New form added which allows institutions to define academic years by level to determine when a student has progressed to the next academic period

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### Financial Aid Crossover Terms

- New form allows institutions to define financial aid crossover term rules to determine when a cross over period exists in order to calculate the most beneficial Pell award (current aid year or upcoming aid year)
- For this release – PELL ONLY

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### Aid Period Validation (RTVAPRD)

- New checkbox used for instances where assignment of a crossover term for an aid period is needed
  - This allows a term to be defined in two separate aid years (For PELL)
  - Added concept of Pell Aid Period to allow Pell to cross aid years.

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## Pell Aid Period

- Pell Aid Period can be assigned manually on ROAPELL or batch posted



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## Award Maintenance (RPAAWRD), Package Maintenance (RPAAPMT)

- Forms display information for the Pell Aid Period and when Pell awarded in a crossover term



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## Crossover Terms

- Additional forms that have been modified to allow a crossover term to be used in multiple aid years for PELL
  - RPBOPTS, RORTPRD, RBAABUD, RFRMGMT, ROAIMMP, ROAMGMT, ROIDISB



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### Pell Calculation Process (RPEPELL)

- **New Parameter allows the process to be run simultaneously for 2 aid years**
  - Will determine which aid year the crossover term award should be awarded
  - Routine will stop doing the automatic calculation for crossover terms after the Pell Crossover Cutoff Date has been reached
  - If Pell awarded and paid in one year, then the other year becomes more beneficial – initial Pell will be reversed and new Pell will be paid

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### Packaging Process (RPEPCKG)

- **Process will adjust the existing Reduce Need awards to include any Pell awards in a crossover term which were awarded in the other aid year**

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### Disbursement Process (RPEDISB)

- **Process modified to use the Pell aid period instead of the base aid period for the student when disbursing Pell**

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## Additional Processes/Reports Modified

- **Modified to allow a crossover term to be used in multiple aid years for PELL**
  - REROR10, REROR11, RFRABAL, RORBPST, RPRDDUP, RPRVDIS
- **Additional non critical processes and forms will be delivered in a future release**
  - ROARMAN, RPIFTRM, RPRADSB, RPRAWDB, RPRAWRD, RPRSBPR



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## Questions and Answers

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Thank you for your participation

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