



Banner Financial Aid Course Program of Study (CPOS)-- Job Aid

Release 9.3.8 – March 2018

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Confidential Business Information

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Think before you print.

Introduction

This functionality offers you the ability to track individual courses and enrollment level to the major or program of study. Functionality to use the integration with Banner Student processing for calculating Banner Financial Aid enrollment is optional. Parameter values found on the Miscellaneous Parameter (RORMPRM) page are used to control when the Financial Aid enrollment calculation will be used. This release includes required data for RORMPRM with a parameter value of Enrollment Rules and a default term code of ZZZZZZ. This provides continued processing of Financial Aid enrollment without using functionality delivered in the Banner Student 8.9 release.

Regulatory Requirements

- Enrollment calculations for Federal Title IV Funds may only include courses that count toward the student's degree or certificate.
- Eligible remedial courses may be included conditionally
- English as Secondary Language (ESL) course may be included conditionally
- Only one repeat of a previously passed course may be included
 - Courses that must be repeated due to failure of another course cannot be included in enrollment calculation and is exception processing that is not handled through Banner Repeat Course checking.
- Resources- 2015-2016 Federal Student Aid Handbook- Volume 1: Student Eligibility- Pages 4, 12, 14

Release Pre-requisites

Must be up to date on the following modules:

- Banner Financial Aid
- Banner General
- Banner Student and CAPP
- Banner Accounts Receivable
- If Integrated with Degree Works
 - Banner Student Overall
 - DB Upgrade
 - Ellucian Degree Works

Setup- Banner Student

- GORRSQL- Business Rules Page
 - Sample rules are delivered to identify remedial and ESL courses
 - CPOS_REMEDIAL_RULE
 - CPOS_ESL_RULE
 - Modify the delivered rules for your institution to be used by SFPCPOS

Business Rules GORRSQL 9 0 (TRNG)

Process: CPOS CPOS Process Rules Rule: CPOS_ESL_RULE Standard rule for ESL process

BUSINESS RULES

Record of Start Date: 07/12/2016

SQL Statement: `SELECT Y FROM SCBSUPP A WHERE A.SCBSUPP.SUBJ_CODE = 'ESL' AND A.SCBSUPP.CRSE_NUMB IS NOT NULL AND A.SCBSUPP.EFF_TERM = (SELECT MAX(B.SCBSUPP.EFF_TERM) FROM SCBSUPP B WHERE B.SCBSUPP.SUBJ_CODE = A.SCBSUPP.SUBJ_CODE AND B.SCBSUPP.CRSE_NUMB = A.SCBSUPP.CRSE_NUMB AND B.SCBSUPP.EFF_TERM <= 201620)`

Active: Validated:

Operator: None

Activity Date: 04/01/2016 12:41:47 AM Activity User: DCOURRAN

Record: 1/1 GORRSQL_GORRSQL_START_DATE [1]

- SFACPSC- Course program of Study Control Page
 - Processing Rules Tab:
 - As appropriate, activate ESL, Remedial, and Repeat processing by checking “Yes”
 - Enable Preform in Program Processing by checking “Yes”
 - Set the Audit System to use CAPP or Degree Works
 - Enter Control Rules to be used by SFPCPOS
 - Enter Registration Terms that should have changes tracked by SFPCPOS
 - Define start and end dates for identifying registration changes for SFPCPOS

Course Program of Study Control SFACPSC 9 3 1 (TRNG)

Process Rules Override Rules Repeat Exclusion

PROCESS RULES

Perform ESL Processing: Yes No

Perform Remedial Processing: Yes No

Perform Repeat Processing: Yes No

Perform Count For Aid Processing: Yes No

Perform in Program Processing: Yes No

In Program Default Value: Yes No None

Audit System: CAPP Degree Works

Process Code: ...

ESL Rule Code: ...

Remedial Rule Code: ...

Count for Aid Rule Code: ...

CAPP Default Code: ...

CAPP Origin Code: ...

API Integration Code: ...

Save Audit:

Audit Description: ...

Freeze Audit:

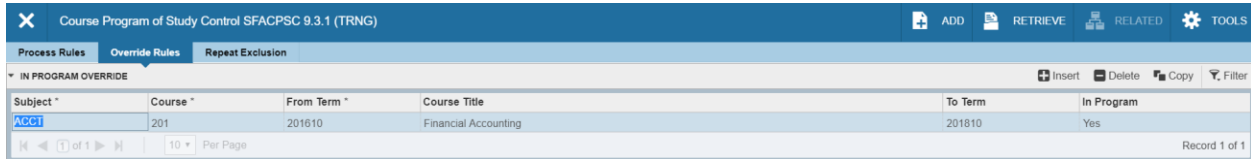
Freeze Type: ...

REGISTRATION TERMS

Term *	Term Description	Start Date	End Date	Comments
201830	Summer 2018	01/01/2016	12/31/2016	
201720	Spring 2017	01/10/2017	05/31/2017	
201710	Fall 2016	08/01/2016	12/01/2016	
201620	Spring 2016	01/01/2016	05/31/2016	
201610	Primer semestre 2016	08/01/2015	05/31/2016	test

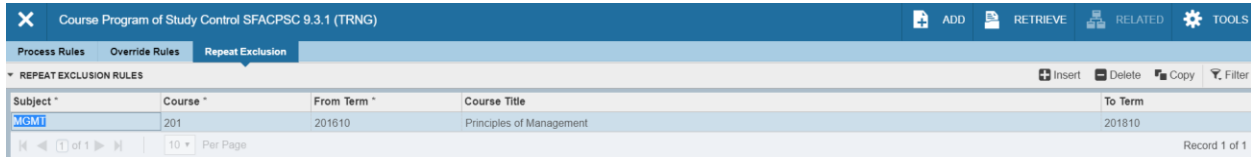
Record 1 of 5

- Override Rules Tab:
 - Setup rules for courses in program overrides to override institution control rules for courses
 - Determine if courses should or should not be counted in degree audit from a specific term to and end term



Subject *	Course *	From Term *	Course Title	To Term	In Program
ACCI	201	201610	Financial Accounting	201810	Yes

- Repeat Exclusion Tab
 - Transfer repeat exclusion courses from RORRPCX to SFACPSC to be used by SFPCPOS

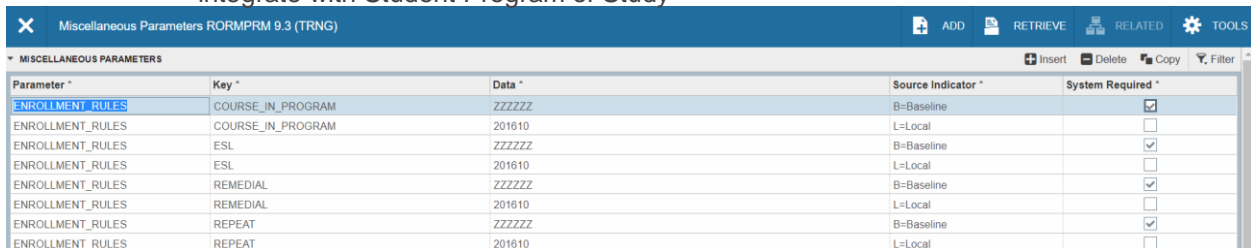


Subject *	Course *	From Term *	Course Title	To Term
MGMT	201	201610	Principles of Management	201810

- Setup Degree Works or CAPP as applicable
- New Process:
 - SFPCPOS- Course Program of Study that populates page SFASCRE with the course audit information to be used in Financial Aid enrollment counts
- New Page:
 - SFASCRE- Student Course Evaluation Audit
- Reference Banner Student 8.9 Release Guide for additional information

Setup- Banner Financial Aid

- RORMPRM- Miscellaneous Parameters
 - The 8.24.2 Release delivered four values that DO NOT integrate with Student Course Program of Study these values maintain current enrollment functionality
 - Four delivered ENROLLMENT_RULES Parameter Keys:
 - COURSE_IN_PROGRAM
 - ESL
 - REMEDIAL
 - REPEAT
 - Data value for these rows are ZZZZZZ
 - Source Indicator of Baseline and a System Required indicatory (current functionality) not integrate with Student Program of Study



Parameter *	Key *	Data *	Source Indicator *	System Required *
ENROLLMENT_RULES	COURSE_IN_PROGRAM	ZZZZZZ	B=Baseline	<input checked="" type="checkbox"/>
ENROLLMENT_RULES	COURSE_IN_PROGRAM	201610	L=Local	<input type="checkbox"/>
ENROLLMENT_RULES	ESL	ZZZZZZ	B=Baseline	<input checked="" type="checkbox"/>
ENROLLMENT_RULES	ESL	201610	L=Local	<input type="checkbox"/>
ENROLLMENT_RULES	REMEDIAL	ZZZZZZ	B=Baseline	<input checked="" type="checkbox"/>
ENROLLMENT_RULES	REMEDIAL	201610	L=Local	<input type="checkbox"/>
ENROLLMENT_RULES	REPEAT	ZZZZZZ	B=Baseline	<input checked="" type="checkbox"/>
ENROLLMENT_RULES	REPEAT	201610	L=Local	<input type="checkbox"/>

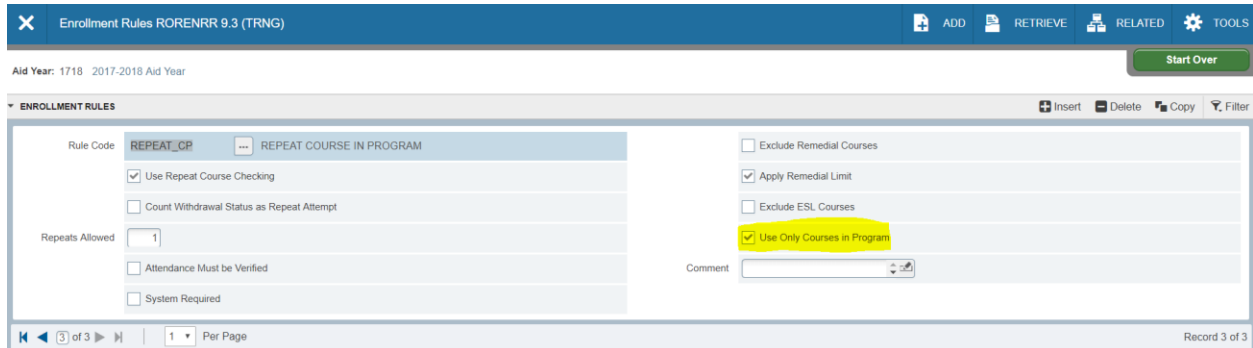
- To Integrate with Student Course Program of study, new entries will need to be entered on RORMPRM
- Enter local entries for new enrollment calculation
- Perform Record Duplicate to add local Source indicator
- Enter term code in Data column for term when new enrollment calculation should begin, the below screen shot illustrates enrollment calculation that will begin 201610

period/term. Enrollment calculation for periods/terms prior to 201610 will not use Course in Program of Study enrollment calculation

- ROAINST- Global Institution Financial Aid Options- Defaults Tab
 - Uses with Course Program of Study functionality for enrollment calculation. Determines how to handle course not in SFASCRES or is disabled.
 - Course in Program (how to handle a course when the course is not in SFASCRES)
 - Yes- check to default is included in student's program
 - No- uncheck to default course is not included in student's program
 - Repeat Course Checking (determine how to handle course not in SFASCRES or Disabled)
 - Yes- check to default course is considered a repeat
 - No- uncheck to default course is not considered a repeat
 - Remedial Course Checking (determine how to handle course not in SFASCRES or Disabled)
 - Yes- check to default course is considered a remedial
 - No- uncheck to default course is not considered a remedial
 - ESL Course Checking (determine how to handle course not in SFASCRES or Disabled)
 - Yes- check to default course is considered as ESL
 - No- uncheck to default course is not considered as ESL
 - Remedial No. Default- Default number of remedial hours to assign when the Remedial Course Checking is checked
 - Repeat No. Default - Default number of repeat attempts to assign when the Remedial Course Checking is checked
 - Remedial Limit- Define the default number of hours for remedial limit calculation (limits the number of remedial hours that can be included in student's enrollment count)
 - Remedial Limit Rule Code- Define an algorithmic rule that calculates the appropriate remedial hours based on the student's criteria.
 - Institutions have the options to default a remedial limit or create an algorithmic rule that calculates the appropriate remedial hours based on student criteria
 - Set up of Remedial Algorithmic Rule:
 - RTVALGO
 - RORALGO- Process = (DRML) default remedial limit

Enrollment Rules Defaults	
<input checked="" type="checkbox"/> Courses in Program	Remedial No Default * <input type="text" value="3,000"/>
<input checked="" type="checkbox"/> Repeat Course Checking	Repeat No Default * <input type="text" value="99"/>
<input checked="" type="checkbox"/> Remedial Course Checking	Remedial Limit * <input type="text" value="30,000"/>
<input checked="" type="checkbox"/> ESL Course Checking	Remedial Limit Rule Code <input type="text" value=""/>

- ROENRR- Enrollment Rules
 - Exclude Remedial Courses check box is now updateable
 - Apply Remedial Limit checkbox was added
 - Works with Exclude Remedial Courses to allow remedial courses up the defined number of remedial hours
 - When the allowable remedial hours limit is reached, course hours beyond the limit are excluded from enrollment count. Only includes hours with the defined remedial limit set on ROAINST as the default number or the algorithmic rule calculation
 - Check to exclude ESL courses as appropriate
 - The Course in Program check box is now updateable- check to include hours which count in program



The screenshot displays the configuration page for Enrollment Rule ROENRR 9.3 (TRNG). The rule code is REPEAT_CP and the rule name is REPEAT COURSE IN PROGRAM. The configuration includes several checkboxes: 'Use Repeat Course Checking' (checked), 'Count Withdrawal Status as Repeat Attempt' (unchecked), 'Exclude Remedial Courses' (unchecked), 'Apply Remedial Limit' (checked), 'Exclude ESL Courses' (unchecked), and 'Use Only Courses in Program' (checked and highlighted in yellow). The 'Repeats Allowed' field is set to 1. There is also a 'Comment' field and a 'System Required' checkbox (unchecked). The interface includes navigation and utility icons at the top and bottom.

- RORRPCX- Financial Aid Repeat Course Exclusion
 - Contains list of courses excluded from repeat course enrollment calculation such as legitimate theses/dissertation or physical education courses
 - Used in current logic
 - If using Course Program of Study functionality setup SFACPSC Repeat Exclusion tab with these courses
- ROAENRL- Student Adjusted hours still sums the hours that are not excluded by the following:
 - ROAINST- excluded by level on the Exclude Course Level Tab
 - RPRAUDT- excluded by registration status or grading mode
 - ROASECT- courses excluded by term
- Reference Banner Financial Aid 8.24.2 Release Guide for additional information

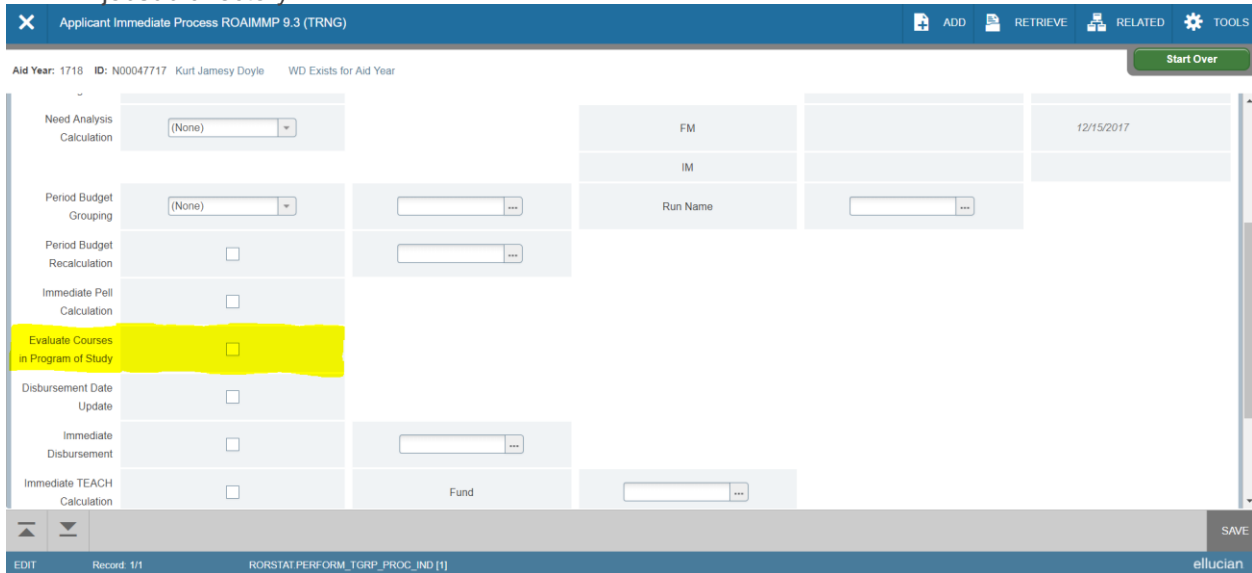
Processing

The Banner Student process SFPCPOS (Student Course Program of Study Process) determines the following eligibility criteria to be included in Enrollment Rules (ROENRR) processing:

- Course is included in student's program as determined by CAPP, Degree Works, or institution developed evaluation
- Course is defined as ESL
- Course is defined as a repeat

The SFPCPOS process will populate the SFASCRES page.

- ROAIMMP- the SFPCPOS process can be run online for an individual student from ROAIMMP, by using the "evaluate courses in Program of Study" option. The output will go directly to the jobsub directory.



- The SFPCPOS (Student Course Program of Study Process) is designed to run via a batch process
 - The user will need security permission class BAN_DEFAULT_M to run this process in batch or online and will also need to be in the correct group to execute the sfpcpos.shl
 - Review log and lis files for successful completion or report of errors
 - SFPCPOS job parameters:

Number	Parameter	Description
01	Run Mode	B- Batch P- Population Selection (enter parameters 02-05) S- Single Student ID (enter parameter 06)
02	Selection Application Code	FINAID (if using P Run Mode)
03	Selection Identifier	Population Selection Name (if using P Run Mode)
04	Selection Creator ID	Banner User ID that created the Population Selection (if using P Run Mode)
05	Selection User ID	Banner User ID the ran the Population Selection through GLBDATA (if using P Run Mode)
06	Student ID	Enter the Student ID (if using S Run Mode)
07	Run in Sleep/Wake Mode	N- Run Now Y- Sleep/Wake Mode
08	Sleep Interval	Enter time in seconds to pause before resuming execution
09	Use Term as Catalog Year	N- Use Academic Year Y- use Term Code

- SFASCRES- Student Course Evaluation Audit Page will be populated from the SFPCPOS process

Student Course Evaluation Audit SFASCRES 9.3.1 (TRNG)

Term: 201910 ID: N00047717 Doyle, Kurt J. View Current

STUDENT COURSE EVALUATION AUDIT

Sequence *	CRN *	Subject	Course	Remedial *	Remedial Hours	ESL *	Repeat *	Repeat Count	Repeat Without Withdrawal	Count for Aid *	Count in Program	Preserve Override
				No		No	No			No		<input type="checkbox"/>

Comments: [Text Area]

Source: Single Student ID

Audit Source: [Text Area]

Audit ID: [Text Area]

Audit Basis: [Text Area]

Create Date: [Text Area]

- ROAENRL- Enrollment Rules calculate enrollment totals based on:
 - Course Program of Study data in SFASCRES
 - Settings in ROENRR and ROAINST

Financial Aid Enrollment ROAENRL 9.3 (TRNG)

Aid Year: 1718 ID: N00047717 Kurt Jamesy Doyle Period: Enrollment Rule

FINANCIAL AID ENROLLMENT

Term Code	Enrollment Rule	Financial Aid Hours Credit	Financial Aid Hours Bill	Financial Aid Hours Adjusted	Consortium Indicator *	System or Manual
201810	STANDARD	15,000	15,000	15,000	<input type="checkbox"/>	M
201810	REPEAT	15,000	15,000	15,000	<input type="checkbox"/>	M

CURRENT ENROLLMENT

Term Code	Enrollment Rule	Current Hours Credit	Current Hours Bill	Current Hours Adjusted	Multi Level	Charges Accepted
					<input type="checkbox"/>	

- ROAENRL- Using the Schedule button within the Current Enrollment Section, it will display the enrollment by course from SFASCRES

Financial Aid Enrollment ROAENRL 9.3 (TRNG)

Aid Year: 1718 ID: N00047717 Kurt Jamesy Doyle Period: Enrollment Rule

ENROLLMENT BY COURSE

CRN	Status
Part of Term	Repeat Number Withdrawal as Repeat Counted
Subject Code	Repeat Number Withdrawal as Repeat Not Counted
Course Number	<input type="checkbox"/> Exclude Section
Start Date	<input type="checkbox"/> Course Level Excluded
End Date	<input type="checkbox"/> Attendance Verified
Credit Hours	<input type="checkbox"/> Counts in Program
Billing Hours	<input type="checkbox"/> Remedial Course
Remedial Hours	<input type="checkbox"/> ESL Course

SAVE

Additional Resources

To listen to the presentations which includes setup, processing, and examples of the Course in Program of Study within Banner, please visit the Ellucian Training site, if applicable, at the following link: <https://training.ellucian.com/learn>.