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| Task ID | Timeline | Task | Process/Notes | Resp. Dept. |  |
| 1 | Jan 16 | Set up **RORPRDS**. Create 1415 record in **ROAINST**, **ROAUSIO.**  NOTE: Add Outlook reminders to update the current term code and Period on ROAINST on the *last day* of every term. | Create new aid year definition and aid year-specific institutional options. Note- Build first page and below section of Options Tab of ROAINST before setting up RORPRDS. Then go back to ROAINST to build further. | ITS – Suneetha | Done |
| 2 | Jan 16 | **STVTERM** should exist for the new aid year | Exists | ITS – Suneetha | Done |
| 3 | Jan 16 | Build **RORCODI** for the new aid year. |  | ITS – Suneetha | Done |
| 4 | Jan 24 | Upgrade to **FA** Release **8.19 (**Feb 1st 2014) **CALBFA 8.2 (**released in April) and **8.20** in Mid-April for 1415 COD processes. | Release 8.19 contains the 1415 ISIR changes.  Release 8.20 includes 1415 COD processing, DL 150% updates and CALB FA BOG processing. | ITS – Ted | Done  8.19 |
| 5 | Feb 1- 10 | Update **Appworx Chains** for 1415 (ISIR load, ISIR Corrections, CAL ISIR Load, AP, COD Upload, COD Download, TM Chain, BOGG\_PROCESSING, CalGrant Upload and Download, Evision Letters)  Note- RCPTP15 replaces RCBTP15 in ISIR Load chain. (26 individual Appworx chains.) | 1415 ISIR Load1/2/2.5/3  BOGG Processing – Add 201408, 201403, 201405.  TCASH – Prompts for TVPREQA (Create Title IV Auth) | ITS – Suneetha | In proc. |
| 6 | Feb 1- 10 | Check **TD Client** shell scripts and parameters  Update custom 8.19 and 8.20 shell scripts |  | ITS – Suneetha | 8.19 Done  8.20 April |
| 7 | Feb 1- 10 | Set up 1415 **Schedule** for the Disbursement Dates  (same asTask ID 16/17 – cut off dates) |  | FA Directors,  Jim | Done |
| 8 | Feb 1- 10 | Review and provide changes to rules used to assign students to **Budget** groups.(If any) | I = AW  D = AH Budget | FA Directors (Margie and Claudia) |  |
| 9 | Feb 6 | Review and provide changes to Documents, **SAR** **Comment** and message codes. Including the Aid Year specific PDFs required for Indexing.  (FA Leads + Claudia – 1415 Financial Aid Forms – Bar codes) | Review Release Guide to identify new message code. Print Comment codes and compare to 1415 | FA Team leads will review. Eric, Lucy and Aileen | In proc. |
| 10 | Feb | Update **BOG online** text for 1415. | Changes from BOG follow up meeting | ITS – Suneetha |  |
| 11 | Jan - April | New **1415** **online BOG Application** and new link on WebSmart |  | ITS –Chris and Suneetha |  |
| 12 | Feb 1-10 | Data source rules to be set in **RCRDTSR-** for EDE and CAL | Create 1415 record.(**Note- RCRTP15; Goto GJAPCTL, enter 1415 parms and save as 1415.**  Also create **GJAPDFT** values for all the users who will/eventually will work on suspense files; this is to enable them to load using ‘load’ button on RCRSUSP. The parm set should have a name Both EDE and CAL parameter sets have to be set up. | ITS - Suneetha | Done |
| 13 | Feb 4 | ***ROPROLL*** ***–*** ***Financial Aid new Year Roll Process*** –  The ROPROLL process rolls over selected aid year specific information from one aid year to another. You run the process from job submission which rolls rules from the current aid year (Parameter 01) to the new aid year (Parameter 02) that you want to set up. The process provides you with the option to roll the specified rules to the new aid year or to skip the roll of the particular rules. You can determine if the roll was successful for the selected steps by printing, or reviewing online, the ROPROLL file (which is created by this process). Rules will only be rolled if they do not already exist in the new aid year.  (Same as 8) | **Group Selection Rules Roll (Parameter 03)** -Perform Roll of Group Rules. This step rolls Group Assignment Rules, Fund Awarding and Disbursement Rules, and Group Packaging Awarding Rules found in the current aid year to the new aid year. Review the aid year specific forms outlined in each module to assure that any aid year required changes are made.  -ROAINST: Institutional Options (ROAINST) must be set up for the aid year in which rules are being rolled.  Tables which are rolled include:  RORGDAT, RORCMPL, and RORGSQL.  Note that both simple and expert (compiled) rules are  being rolled. It is unnecessary to compile the rolled  rules for use in processing. Review the sections of this document devoted to the modules for the RORRULE form to assure that data within the rules is valid for the new aid year.  **Fund Aid Year Specific Roll (Parameter 04)** - Perform roll of fund data. This step rolls any aid year specific Funds Management Rules found in the current aid year to the new aid year. If this step is selected, review the aid year specific forms outlined in the Funds Management module to assure that any aid year-required changes are made.  -ROAINST: Institutional Options (ROAINST) must be set up for the aid year to which rules are being rolled.  Tables which are rolled include: RFRASPC, RFRCOMM, RFRBCMP, RFRDETC, RFRTREQ,  RFRMESG, RPBLOPT.  Review the Funds Management Section of this document for the specified forms to ensure that data within the rules is valid for the new aid year.  **Budgeting Rules Roll (Parameter 05)** - Perform roll of budget data. This step rolls selected aid year specific Budgeting Rules found in the current aid year to the new aid year. If this step is selected, review the aid year specific forms outlined in the Budgeting Module section to assure that any aid year-required changes are made.  -ROAINST: Institutional Options (ROAINST) must be setup for the aid year to which rules are being rolled.  Tables which are rolled include:  RBRCOMP and RBRGMSG.  Review the Budgeting Module of this document for the forms RBRCOMP and RORMESG to assure that data within the rules is valid for the new aid year.  **Tracking Rules Roll (Parameter 06)** - Perform roll of tracking data. This step rolls selected aid year specific Tracking Rules found in the current aid year to the new aid year. If this step is selected, review the aid year specific forms outlined in the Tracking  Module sections to assure that any aid year-required changes are made.  -ROAINST: Institutional Options (ROAINST) must be set up for the aid year to which rules are being rolled.  Tables which are rolled include:  RRRGREQ and RRRTMSG.  Review the Tracking Module section of this document  for the forms **RRRGREQ** and RORMESG to assure that data within the rules is valid for the new aid year.  **Packaging Rules Roll (Parameter 07)** - Perform roll of packaging data. This step rolls selected aid year specific Packaging Rules found in the current aid year to the new aid year. If this step is selected, review the aid year specific forms outlined in the Packaging Module section to assure that any aid year-required changes are made.  -ROAINST: Institutional Options (ROAINST) must be set up for the aid year to which rules are being rolled.  *Tables* which are rolled include: RORAUDT, RPBOPTS, RPRGGAP, RPRGSHP, RPRGEQY, RPRDEFG, RPRDEFE, RPRDEFS,RPRFSRC, RPRFCAT, RPRGFND, RPRCLSS, RPRDEGR,  RPRMAJR, and RPRALGR. (Records on RPRALGR, RPRDEFE, RPRDEFG, RPRDEFS, RPRGEQY, RPRGGAP, RPRGSHP, and RPRGFND with inactive Algorithmic Packaging Group Codes on  RTVALGR will not be rolled.)  Review the Packaging Module section of this document for the *forms*  RPRAUDT, RPROPTS, RPRDEFR, RPRPCKR, RPRGFND, RPRCLSS, RPRDEGR, RPRMAJR, RPRFSRC, RPRFCAT, and RPRALGR to assure that data within the rules is valid for the new aid year.  **Common Functions Rules Roll (Parameter 08)** - Perform roll of common data. This step rolls selected aid year specific Common Functions rules found in the current aid year to the new aid year. If this step is selected, review the aid year specific forms outlined in the Common Functions Module section to assure that any aid year required changes are made.  -ROAINST: Institutional Options (ROAINST) must be set up for the aid year to which rules are being rolled.  Review: RTVUSER, RORPOST, RCRDTSR, RORCAMP, RORCODI, RORWEBQ, RORWBQA, RORACYR,RORUSER, RCRDTSR,  RORWSQL, RORWTAB, RORWTXT, RORWEBR, and RORWEBA.  NOTE: **RORUSER** for 1415 requires 8 fields for CAL ISIR.  (Records in RORCAMP with an inactive **Pell Fund Code** on  RFRBASE will have the **Pell Fund Code** set to Null.)  Review the Common Functions Module section of this document for the forms RTVUSER, RORPOST, RCRDTSR, and ROAINST to assure that data within the rules is valid for the new aid year.  **Student Employment Rules Roll (Parameter 09)** - Perform roll of employment data. This step rolls selected aid year specific Student Employment rules found in the current aid year to the new aid year. If this step is selected, review the aid year specific forms outlined in the Student Employment Module section to assure that any aid year-required changes are made.  -ROAINST: Institutional Options (ROAINST) must be set up for the aid year to which rules are being rolled.  Tables which are rolled include: RJRPLRL.  Review the Student Employment Module section of this document for the form RJRPLRL to assure that data within the rules is valid for the new aid year. | ITS – Suneetha | Done |
| 14 | 11th Feb 2014 | Can Begin ISIR Download for new Aid Year |  |  | Done |
| 15 | Week of Feb 4th | Check Popsels for FINAID Application | Apply Period/Term to Enrollment period changes. | ITS - Suneetha | In proc. |
| 16 | Week of Feb 4th | Provide cut-off dates for each term in the aid year | Fall 2014:  * Term start date: 18-AUG-2014 (STVTERM) * Official Census date: * Drop for non-payment of early reg stu: * Grade Roll:  Spring 2015:  * Term start date: 22-JAN-2015 * Official Census date: * Drop for non-payment of early reg stu: * Grade Roll:  Summer 2015:  * Term start date: 15-JUN-2015 * Official Census date: * Drop for non-payment of early reg stu: * Grade Roll: | FA Directors  Waiting for term start dates. | Done |
| 17 | Week of Feb 4th | Provide disbursement dates for each term in the aid year. *If your campus process loans, we need those dates as well.*  Provide 1415 FA Disbursement Schedule (worksheet) | Fall 2014:  * First Disbursement date: * Freeze/second disbursement date:  Spring 2015:  * First Disbursement date: * Freeze/second disbursement date:  Summer 2015:  * First Disbursement date: * Freeze/second disbursement date: | FA Directors / Jim B. | Done |
| 18 | Week of Feb 4th | Update **RFRMGMT** | Update(if required)/Review Fund Management Form for new Aid Year and Fund Code | FA Directors (each college) |  |
| 19 | Week of Feb 4th | Update **Rules/Popsels** to reflect new views |  | ITS - Suneetha |  |
| 20 | Week of Feb 4th | ***Common Functions Module*** –  Review the following non-aid-year-specific forms within the Common Functions Module to assure that the codes meet procedural requirements for the new aid year. | Review:  -RTVAPRD  -RTVHOLD  -RTVMESG(Create 2014 parent’s and student’s tax return messages),  -RTVSAPR  -RORDSUP  -ROALOGC  -ROAINST  -RORNYVD  ROAINST: Create new aid year definition and aid year specific institutional options.  -RTVTREQ (create 2014 aid year parent’s and student’s tracking validation requirements)  -RTVTRST  -STVTERM (make sure it exists for the new aid year)  -RTVAPRD  -RTVSAPR  -RTVTGRP  -RTVBGRP  -RTVPGRP  -STVLEVL  -ROAELTR  -ROAELTF  -RORNYVD  (If *Common Functions* information was rolled, review the following forms:  **-** RORUSER  **-** RORPOST  **-** RORCODI  - RCRDTSR)  RORDATA: Review the indicators for logging, Pell corrections, and INAS override fields to ensure that these fields are correctly set for the new aid year.  RORTPRD: Associate terms from STVTERM to aid periods for the new aid year.  -ROAINST  -RTVAPRD  -STVTERM (make sure it exists for the new aid year)  Create RORTPRD for all aid periods (copy from the previous aid year).  RORUSER: Define optional institutionally defined field definitions for new aid year as needed.  -ROAINST  RORPOST: Define batch posting rules for the new aid year as necessary. Update ISIR Load chain 2 accordingly.  -ROAINST  -GLRAPPL  -GLRSLCT (update popsels that have aid year and views(eg.,ROVST14) to reflect the new aid year  -(User needs to provide new ‘C’ (if any) codes for 1415 aid year) | ITS - Suneetha |  |
| 21 |  | ***Record Creation Module*** (Data Management Module- Review the following non-aid-year-specific forms within the Record Creation  Module (i.e., the Data Management Menu) prior to building aid year specific rules to assure that the codes meet procedural requirements for the new aid year. | Review:  -ROAINST (this form is aid year specific)  -RTVINFC  -RCRTPTR  -GTVCMSC  -GORCMSC  -GORCMRL  -GORNAME  -RCRDTSR  ROAINST: Populate year specific fields.  GORCMRL  RCRDTSR: Create Data Source Matching Rules for the new aid year for batch and online matching.  -RTVINFC  -GTVCMSC  -GORCMSC  GJAPDFT: Create Saved parameter set for Data Source for the new aid year for each user loading records online from suspense Financial Aid Suspended Records Maintenance Form (RCRSUSP). | ITS - Suneetha |  |
| 22 | Week of Feb 4th | ***Need Analysis Module*** - Review these Need Analysis Module forms prior to building aid year specific rules to ensure that the codes meet procedural requirements for the new aid year. | Review:  -RORTPRD  -RPROPTS  -ROAINST  -RFRMGMT  -RPRCLSS  -RFRDEFA  -RORCODI  -RFRASCH  RPROPTS: Check the following packaging fields for the new aid year. (Need cut off dates from directors)  -ROAINST  -RTVTRST  -STVTERM - Set the Estimated Enrollment for Pell Indicator to Y if you want to permit the use of an applicant's estimated enrollment for a Pell Grant in packaging. Enter a value in *the Default Estimated Enrollment* field for those cases in which an applicant's estimated enrollment does not exist (1  - Full Time, 2 - 3/4 Time, or 3 - Half Time). \*\*\*  ROAINST: Review the Institution Financial Aid Options Form for the new aid year.  RFRMGMT: Review the Fund Management Form for the new aid year and fund code.  -RFRBASE (directors need to update for PELL, SEOG, ACG)  -RTVAWST  RPRCLSS: Review the Class Code Translation Form for this aid year.  -STVLEVL  -STVCLAS | ITS - Suneetha  RFRDEFA & RFRASCH - Regina | Done |
| 23 | Week of Feb 4th | ***Tracking Module*** - Review the following forms before you create aid year specific rules for the Tracking  Module to ensure that the codes meet the procedural requirements for the new Financial Aid processing year (i.e., add any necessary aid year specific tracking requirements). | Review:  -ROAINST  -RTVTGRP  -RTVTREQ    1415 – For CITZ, NSLDS and TIVOVP, remove ‘See instructions’ in the long descriptions on RTVTREQ.  This is because FinAid 18.1 Self Service was updated to display the instructions below the requirement on Web Tailor.  RRRGREQ: Associate tracking requirements to tracking groups for the new aid year. Use the Copy function to copy group rules from the prior year to the new year.  -RTVTGRP  -ROAINST  RORRULE: Create Group Assignment Rules for the new aid year. Use the Copy function to copy group rules from the prior year to the new aid year. Run the script : RYQRULE  -RTVTGRP  -ROAINST - Check the values in the rules to ensure that you do not need to update hard coded dates. Use ROIGRPI to verify that you set up all required rules for the new aid year (the Rules Exist Indicator is set to Y).  Confirm that the Default Group Code exists on ROAINST for the new aid year. Use ROIGRPI from the prior year to derive the Priority Codes on RTVTGRP for the new aid year.  Ensure that any Group Assignment rules that use the  ROVADxx, ROVSTxx, ROVA2xx, ROVAMxx, and ROVAYxx views utilize the new aid year.  RORMESG: Associate any new messages to tracking requirement codes for use in Tracking Letter Generation  -RTVMESG - Set up new message codes on the Message Code Validation Form (RTVMESG). Make sure that you update any messages which may contain dated information that is hard coded within the text.  -ROAINST  -RTVTREQ  -RTVMESG  New for 1415 and onwards- Update **ERALINK** according to the new/updated RTVTREQ codes and also the BDMS drop down list, by Edgar, as Admin- with the new codes. This is for the scanning project.  Also the new codes/forms should be ‘bar coded’ in case of in-house forms. They need to be in PDF format. These forms have to be sent to Chris/Web Development Programmer to be uploaded to the Web Server. For the new ‘other’ forms, have a bar code cover sheet printed. | ITS – Suneetha  Indexing |  |
| 24 | Week of Feb 4th | ***Budgeting Module*** - Review the following forms before you create aid year specific rules for the Budget Module to assure that the codes meet procedural requirements for the new aid year. | Review:  -ROAINST  -RTVAPRD  -RTVBTYP  -RTVCOMP  -RTVBGRP  -RBRGTYP  RBRCOMP: Directors need to provide COA spreadsheet)  -RTVBGRP  -RBRGTYP  -RTVAPRD  -RTVCOMP  Create full 100% budgets first. You need to create prorated budgets if you do not want strict prorating of all component amounts. (You can only build 100% budgets for Pell budgets.)  Use the Copy function to copy rules to the new aid year. After you copy the rules, use the adjustment functionality to update component amounts.  Use RBIBUDG to track those budgets which have been built for the new aid year.  RORMESG: (SKIP)  -RTVMESG Set up new message codes if any  -RTVBGRP Review messages from the previous year to ensure that hard coded date information is not embedded within the text of the message.  RORRULE:  -ROAINST  -RTVBGRP Run the script : RYQRULE  Use ROIGRPI to assure that you built all required rules. Check values in the rules to ensure that you do not need to update any hard coded dates.  If you use ROVADxx, ROVSTxx, ROVA2xx, ROVAMxx, and ROVAYxx views, be certain that you use the correct aid year view.  Confirm that the Default Budget Group Code exists on  ROAINST for the new aid year.  Use ROIGRPI from the prior year to derive priority codes for the new aid year on RTVBGRP. | ITS – Suneetha  COA-Claudia Margie will be updating.  Note: No changes. Margie will check. |  |
| 25 | Week of Feb 4th | ***Funds Management Module*** - Review the following forms before you create aid year specific rules for the Funds Management Module to assure that the codes meet procedural requirements for the new aid year. | Review:  -ROAINST  -RTVFTYP  -RTVFSRC  -RORTPRD  -RFRBASE  -RTVAWST  ROAINST: Check Use Multi-Award Years Perkins MPN field on the Institution Loan Options window if you use the Multi-Award Years Perkins MPN at your institution.  RFRMGMT: Build aid year specific data for each fund that you intend to use from RFRBASE in the new aid year. Use budget totals from the prior year to help determine over-commitment rates for the new aid year.  -RTVAWST  -RTVCOMP  -RTVTREQ  -RTVMESG  -TSADETC  RFRDEFA: Create term award and disbursement default schedules for the new aid year by aid period.  -RTVAPRD Banner uses these default rules when you do not specify fund specific award and disbursement rules (RFRASCH).  -RORTPRD  -ROAINST  -RPROPTS The Memo Expiration date is required if any funds are able to be memoed. The disbursement date initially defaults from the term cutoff date as you define it on RPROPTS for the new aid year. If you do not define cut-off dates, Banner defaults the start date of the term from STVTERM.  RFRASCH: Create optional term award and disbursement schedules for the new aid year by aid period and fund code.  -ROAINST  -RORTPRD  -RFRMGMT  -RFRDEFA  RORRULE: Create optional Fund Awarding Rules for the new aid year by fund code. If you use the ROVADxx, ROVSTxx, ROVA2xx, ROVAMxx,  and ROVAYxx views, be certain to use the new aid year views in your rules. Check for embedded values in rules which are year-specific and update the values, if necessary.  -ROAINST  -RFRMGMT | ITS – Suneetha  RFRASCH & RFRDEFA - Regina |  |
| 26 | Week of Feb 4th | ***Packaging and Disbursement Module*** - Review the following forms before you create aid year specific rules for the Packaging and Disbursement Module to assure that the codes meet procedural requirements for the new aid year. | Review:  -ROAINST  -RTVPGRP  -RTVAWST  -STVTERM  -STVMAJR  RPROPTS: Create aid year specific Packaging and Disbursement options. Confirm that STVTERM has a new aid year associated with it to validate terms.  -ROAINST  -RTVTRST  -STVTERM  RPRAUDT: Create aid year specific rules for Audit Grading Mode courses for disbursement processing if you elect to use adjusted enrollment hours on the  RPROPTS form. (SKIP)  -ROAINST  ROASECT: (SKIP)  -ROAINST  -SSASECT  RPRCLSS: Create Class Code Translations for use in Disbursement Processing for the new aid year. (SKIP)  -ROAINST  -STVLEVL  -STVCLAS  RORRULE: Create Packaging Group Assignment Rules for the new aid year. Note that maintenance to package groups is only necessary if you use automated packaging.  -ROAINST  -RTVPGRP Use ROIGRPI to ensure that you create all required rules for the new aid year. Be sure to update any rules with hardcoded, year-specific  values. If you use ROVADxx, ROVSTxx, ROVA2xx,  ROVAMxx, and ROVAYxx views, be sure to use the proper year view.  Use ROIGRPI from the prior year to derive group priority codes for the new year on RTVPGRP. Ensure that the Packaging Default Group code exists on ROAINST.  RPRDEFR: If you use Gap, Self-Help, or Equity Packaging philosophies, create the default rules on the RPRPCKR form for packaging groups. (SKIP)  -ROAINST  RPRPCKR: Create Gap, Self-Help, or Equity Packaging Rules by packaging group for the new aid year. (SKIP)  -ROAINST  -RTVPGRP  RPRGFND: Create fund code associations to packaging groups for the new aid year. (Directors need to review/update this form)  -ROAINST  -RTVPGRP  -RFRMGMT (Records must exist for the new aid year for the desired funds before you can build these rules.  Use these rules only in automatic packaging.  RORRULE: Create optional group/fund awarding rules for the new aid year.  -ROAINST  -RTVPGRP  -RPRGFND You must associate the fund with the Packaging Group on RPRGFND before you can create these group-specific awarding rules.  Use the Create Record function to copy Fund Awarding rules from RORRULE for the aid year/fund code combination.  RPREXPT: Create optional exemption interface rules (SKIP)  -ROAINST  -RPROPTS  -TSAEXPT  RPRCONT: Create optional Contract Interface rules for those contracts in which you want to count student recipient amounts as a resource in their aid package. (SKIP)  -ROAINST  -RPROPTS  -TSACONT  RPRFSRC: Create optional fund source maximum award rules for the new aid year. (SKIP)  -ROAINST  -RTVPGRP  -RTVFSRC  Set up text for drop dates for new checks/debit cards. | ITS - Suneetha |  |
| 27 | Week of Feb 4th | ***Loan Module*** - Review the following forms before you create aid year specific rules for the Loan Module to assure that the codes meet procedural requirements for the new aid year. | Review:  ROAINST  RTVLNST  *RPRLNDR- Obsolete*  RFRBASE  **RPRLPRD**  RPRLOPT: Create aid year specific options for each loan fund that you process in the loan module. Set up fund codes for the loans you want to process through the loan module with the Loan Process indicator checked on the RFRMGMT form for the new aid year.  -ROAINST  -RTVTREQ  -RFRMGMT/RFRBASE  RTVTRST  RTVLNST  RTVAWST  RPRLNDR  RPRLPRD: Create valid loan periods for the new aid year. Create aid year specific loan periods for the new aid year since rules are term and date specific. (Update disbursement schedule rules and RPRLPRD for FALL, SPRING, SUMMER AND FULL periods)  -ROAINST  -RTVAPRD/RORTPRD  -STVTERM | ITS - Suneetha |  |
| 28 | Week of Feb 4th | ***Electronic Data Exchange (EDE) Module*** - For Pell Corrections and COD processing, check the rules on the following forms to assure that you set the rules correctly for the new aid year. Also, refer to the most recent COD Handbook for more detail on set up. (SKIP) | ROAINST: For corrections processing, check the EDE Correction  Defaults window -  Enter the default COD Attending ID for the institution in the Attending ID field. This automatically populates the Reporting ID, Source ID, and Pell ID fields on this tab, as well as the Direct Loan School Code field on the Loan Options window with the data established for the Attending ID on the RORCODI Form.  Enter the Main Campus Entity ID, the name of the financial aid director, the director's phone number, and the Title IV Destination Number assigned to your institution in the appropriate fields. f you use an EDE Service Agent, enter the code in the Service Agent Code field.  Campus/EDE Defaults window -  Build all data related to each campus on the Campus/EDE Defaults window.  RORCODI: Review the ID relationships built on RORCODI for the aid year to verify that relationships are correct.  RORDATA: | ITS - Suneetha |  |
| 29 | Week of Feb 4th | ***Student Employment Module*** - Review the following forms before you create aid year specific rules for Student Employment to assure that the codes meet procedural requirements for the new aid year. | Review:  -RTVAUST  -RTVRFST  -ROAINST  -RJAPLBD  -RJRJREQ  -RJRJOBT  RJRSEDR: Define default authorization rules for the new aid year.  -ROAINST  -RTVAUST  RJRPLRL: Create valid positions for each placement within the new aid year. (change allocation to $999999.00 rest is rolled from process ROPROLL; the Placement codes updated include, CWSCSM, CWSSKY, , FCWSKY, FWSCAN,FWSSKY and FWSCSM. )  -ROAINST  -RJAPLBD  RJRPAYL: Indicate the valid payrolls from Banner Human Resources which you want to load into Banner Financial Aid. This form is only required if you use Banner Human Resources to load payroll compensation information back to Banner Financial Aid. (set up the calendar for the new aid year)  -ROAINST  -STVTERM  -Banner HR/Finance  (Connie - **PTRCALN** for 2014-2015 and RJRPAYL needs to be updated with that information.) | ITS – Suneetha  Barbara Dedo |  |
| 30 |  | GTVSDAX | Update EFC value for the aid year. Information for changed EFC can be obtained from the IFAP website.  The name of the variable is EFC (1415 EFC= ? GTVSDAX for Auto Packaging.) Update SAP term code variables | ITS - Suneetha | N/A for 1415 |
| 31 |  | TSRRFND | Create Popsels for the 1415 Aid Year | ITS - Suneetha |  |
| 32 |  | Appworx | Review 1415 Appworx chains and create new 1415 parameter for the RYQUPDT process, RYQRQ15process. (15-20 min schedule; create process ryqrq15.sql) | ITS - Suneetha |  |
| 33 | Feb 14 (tentatively) | New Year Roll completed! | Begin processing and sending tracking letters. | ITS - Suneetha |  |

NOTE: For TM and Tracking/Award letter chains, the dynamic parameters of Term Code have to be updated every Term on Appworx in their respective chains.

NOTE: DAILY Freeze Popsel Dynamic parameter of Term Code is to be updated every Term as well.

NOTE: Set up ROREMAL steps for CAL ISIRs for 1415.

Note: PELL 2014-2015 maximum award - $5,730