TAP Estimator

Financial Aid 8.8S1

August 2010
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INTRODUCTION
The New York State Tuition Assistance Program (TAP) is a State funded grant program administered by the New York State Higher Education Services Corporation (HESC). A TAP grant helps pay the tuition of eligible full-time and part-time students at approved schools in New York State.

HESC does not declare actual TAP grant awards until after the State budget is signed (usually in April but it can be later). Once the budget is passed, HESC calculates the actual TAP award amounts and sends them to the institution on the Student Status Listing (SSL).

Financial Aid administrators need to estimate TAP grants in order to send out initial financial aid packages to students before March. The TAP Estimator application helps Financial Aid administrators identify students eligible for TAP and Part-Time TAP grant awards and produce reasonable TAP award estimates thus avoiding over-awarding students.

The TAP Estimator uses the Free Application for Federal Student Aid (FAFSA) data and other criteria to determine TAP and Part-Time TAP award eligibility and estimates.

Part-Time TAP:
- **NOT** the same as Aid for Part-Time Study (APTS);
- A student receiving APTS is **NOT** eligible for Part-Time TAP;
- To be eligible for Part-Time TAP, a student must meet the same income, residency, and other criteria that are required for TAP eligibility;
- Additionally, a student must be registered for 6 – 11 credits, not be receiving APTS, and meet these three additional requirements:
  - Be a first-time freshman in the 2006-2007 academic year or thereafter; and
  - Have earned 12 credits or more in each of two consecutive preceding semesters (a minimum of 24 credits)—this is a one-time requirement; and
  - Maintain a ‘C’ average

The TAP Estimator will help determine these requirements as well as income and other eligibility criteria.
Introduction of the SICAS TAP Estimator Application

Function:
The SICAS TAP Estimator application estimates TAP and Part-Time TAP grant awards. There are two methods to estimate Part-Time TAP awards:

Method A
Is for campuses that package all students as full-time and use the BANNER method of prorating awards for students with less than a full-time load:

- Uses the TAP Fund Code to determine TAP and proration to determine (part-time) TAP Authorizations and Memos
- The actual full-time TAP award amounts from the Student Status Listing are used to determine the prorated Part-Time TAP award
- After certification, the actual Part-Time TAP award is loaded to a separate Part-Time TAP fund code and the full-time TAP award amount is brought down to zero
- The award is shown as a Part-Time TAP award on the Student Status Listing
- Method A uses two separate Fund Codes
- The SICAS TAP Estimator Award Process RPEYETAP is run twice:
  - Once for the TAP Fund Code and
  - Once for the Part-Time TAP Fund Code

Method B
Is for campuses that package students that have a Part-Time Expected Enrollment Status with a Part-Time Package:

- This method uses two separate Fund Codes - One for TAP and One for Part-Time TAP;
- The BANNER Financial Aid Selection Rules Form RORRULE designates which students receive a TAP award and which students receive a Part-Time TAP award;
- In the Fall, after certification:
  - The Student Status Listing (SSL) loads the actual Fall award; and
  - The Spring estimate is removed;
  - When this happens, an optional Third Fund Code can be created on the Fund Base Data Form RFRBASE as a place to manually store the Spring award amount;
  - The Spring award amount can remain zero until the Spring award is certified;
  - If an optional Third Fund Code is created, it must be removed manually when the Spring TAP award is certified and loaded;
  - If the third Fund Code is not removed, the student will appear to have been granted an award larger than the actual spring award
SICAS TAP Estimator Process Flow Overview

FORMS REQUIRED FOR SET UP:

- GTVSDAX  Crosswalk Validation Form (required for Part-Time TAP Method B)
- ROAINST  Institution Financial Aid Options Form
- ROAUSIO  U.S. Specific Institution Financial Aid Options Form
- RFRBASE  Fund Base Data Form
- RFRMGMNT Fund Management Form
- RFRDEFA  Default Award and Disbursement Schedule Rules Form
- RFRASCH  Fund Award and Disbursement Schedule Rules Form
- RTVYTAP  SICAS TAP Code Validation Form
- STVYTTY  SICAS State Award Term Validation Form
- RTVYHEC  SICAS HESC Fund Code Translation Form
- RPRYCSRP  SICAS TAP Code Specific Rules Form
- RORYULE  SICAS Financial Aid Selection Rules Form
- RORRULE  Financial Aid Selection Rules Form
- SORYULE  SICAS Eligibility Selection Rules Form

SICAS TAP ESTIMATOR PROCESS FLOW:

Step 1: Create a Population Selection (Optional)

Step 2: Run the SICAS TAP Estimator Group and Calculate Process RPEYETAPxxxx for the desired Aid Year (This must run in Update Mode to calculate and store Part-Time TAP awards)

Step 3: Run the SICAS TAP Estimator Award Process RPEYETAP for the desired Aid Year for the TAP Fund Code

Step 4: Run the SICAS TAP Estimator Award Process RPEYETAP for the desired Aid Year for the Part-Time TAP Fund Code – (Method B only)
**GTVSDAX - Crosswalk Validation Form**

<table>
<thead>
<tr>
<th>Code:</th>
<th>Sequence:</th>
<th>Group:</th>
<th>External Code:</th>
<th>Translation Code:</th>
<th>Activity Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>HALFTIME</td>
<td></td>
<td>SICAS_PTT_ENRL</td>
<td>10</td>
<td></td>
<td>12-SEP-2007</td>
</tr>
<tr>
<td>Description:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
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</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>System Required</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Code:</th>
<th>Sequence:</th>
<th>Group:</th>
<th>External Code:</th>
<th>Translation Code:</th>
<th>Activity Date:</th>
</tr>
</thead>
<tbody>
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<td>THREE-QTR</td>
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<td>SICAS_PTT_ENRL</td>
<td>25</td>
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<td>12-SEP-2007</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

**Function:**

Use the BANNER Crosswalk Validation Form **GTVSDAX** to verify External and Internal Codes for Part-Time TAP - Method B.

Method B is for campuses that package students reporting a Part-Time Expected Enrollment Status with a Part-Time Package.

Some External Codes may vary by institution; therefore, the actual codes used at the institution must be entered.
**GTVSDAX - Crosswalk Validation Form**

<table>
<thead>
<tr>
<th>Internal Code</th>
<th>Internal Group</th>
<th>Displays External Codes For</th>
</tr>
</thead>
<tbody>
<tr>
<td>HALF-TIME THREE-QTR</td>
<td>SICAS_PTT_ENRL</td>
<td>Percentage of Full-Time TAP estimates awarded to Part-Time students</td>
</tr>
<tr>
<td>FRESHMAN</td>
<td>SICAS_PTT_TYPE</td>
<td>Determining Freshman Status</td>
</tr>
</tbody>
</table>

**SET UP:**

**Internal Code:** HALF-TIME

**Internal Code:** THREE-QTR

- Use the Internal Codes of HALF-TIME and THREE-QTR and the Internal Group SICAS_PTT_ENRL to verify the External Codes for percentages of full-time TAP estimate awards that are awarded to part-time students
- The Internal Codes are HALF-TIME and THREE-QTR
- Pick the ‘Enter Query’ button and enter SICAS_PTT_ENRL as the Internal Group
- Then Pick the ‘Execute Query’ button
- The form displays the External Code of ‘50’
- This represents 50% for the Internal Code of ‘HALF-TIME’ for students with an Expected Enrollment Status of half-time
- An External Code of ‘75’ displays
- This represents 75% for the Internal Code of ‘THREE-QTR’ for students with an Expected Enrollment Status of three-quarter time
- A campus may change the External Codes to set the percentage of the award for half-time and three-quarter time awards

**SET UP:**

**Internal Code:** FRESHMAN

**Internal Group:** SICAS_PTT_TYPE

- Use the Internal Code FRESHMAN and the Internal Group SICAS_PTT_TYPE to verify the External Code for determining Freshman Status
- The Internal Code is FRESHMAN
- Pick the ‘Enter Query’ button and enter SICAS_PTT_TYPE in the Group field
- Then Pick the ‘Execute Query’ button
- An initial External Code of ‘S’ is pre-delivered on the form
- The valid External Codes are:
  - S – Student Type (Values on the Student Type Code Validation Form STVSTYP determine Freshman Status – this is the default value)
  - A – Admit Type (Values on the Admissions Type Code Validation Form STVADMT determine Freshman Status)
  - ? – Any Other Value (The campus must define a local modification for determining Freshman Status in the PZ_TAP_FIRST_YEAR mod point)

**NOTE:**

For an External Code of ‘S’ or ‘A’, establish validation codes that indicate Freshman Status using the Internal Code of FRESHMAN and the Internal Group of SICAS_PTT_VALUES.
**GTVSDAX - Crosswalk Validation Form**

<table>
<thead>
<tr>
<th>Internal Code</th>
<th>Internal Group</th>
<th>Displays External Codes For</th>
</tr>
</thead>
<tbody>
<tr>
<td>FRESHMAN</td>
<td>SICAS_PTT_VALUES</td>
<td>Establishing validation codes that indicate Freshman Status</td>
</tr>
</tbody>
</table>

**SET UP:**

**Internal Code:** FRESHMAN  
**Internal Group:** SICAS_PTT_VALUES

- For an External Code of ‘S’ or ‘A’ entered for the Internal Code FRESHMAN and Internal Group SICAS_PTT_TYPE, establish validation codes that indicate Freshman Status
- Pick the ‘Enter Query’ button and enter SICAS_PTT_VALUES as the Internal Group
- Then Pick the ‘Execute Query’ button
- Enter validation codes that indicate Freshman Status
- Create a separate GTVSDAX entry with an External Code and a description for every code used by the institution to indicate Freshman Status
- Make as many entries as necessary

---

**Technical note on creating the PZ_TAP_FIRST_YEAR mod point:**

**Description:**

- This is a LOCAL CAMPUS modification function
- Alter code in this function to determine the student’s eligibility for the first time Freshman in 2006-2007 or later Part-Time TAP requirement

**Parameters:**

- **pidm_in** The student’s pidm is passed in by the calling procedure
- **elig_out** A ‘Y’ should be passed back to this field if the student meets the eligibility criterion and an ‘N’ if the criterion is not met
- **term_out** First semester the student is matriculated should be passed back
- **rsn_out** The reason the student does not meet the eligibility criterion should be passed back and the campus must create the message code(s) to be passed back.

**NOTE:**

SICAS ships this function to CREATE but not REPLACE - therefore, any modifications made here will be preserved during future releases.
## GTVSDAX - Crosswalk Validation Form

<table>
<thead>
<tr>
<th>Internal Code</th>
<th>Internal Group</th>
<th>Displays External Codes For</th>
</tr>
</thead>
<tbody>
<tr>
<td>REPORT</td>
<td>SICAS_GPA_TYPE</td>
<td>Determining how transfer credits are reported</td>
</tr>
</tbody>
</table>

**SET UP:**

- **Internal Code:** REPORT
- **Internal Group:** SICAS_GPA_TYPE

- Use the Internal Code REPORT and the Internal Group SICAS_GPA_TYPE to verify the External Code for transfer credit reporting.
- This External Code defines how an institution reports transfer credits.
- For Part-Time TAP, a student must earn 12 credits or more in each of two consecutive preceding semesters.
- This requirement only needs to be met once.
- Pick the ‘Enter Query’ button and enter SICAS_GPA_TYPE as the Internal Group.
- Then pick the ‘Execute Query’ button.
- The valid External Codes are:
  - I – Institutional Credits Only (Must use ‘I’ if campus lumps transfer credits in the term the student transfers or a previous term)
  - B – Both Institutional and Transfer Credits (May use ‘B’ if campus records transfer credits in the actual term the student earned the credits on the Term Sequence)
  - Course History Form SHATERM)
**ROAINST  Institution Financial Aid Options Form**

<table>
<thead>
<tr>
<th>Aid Year</th>
<th>0708</th>
</tr>
</thead>
</table>

**Function:**
Use the Institution Financial Aid Options Form **ROAINST** to enter the Aid Year and Pell ID

- Aid Year Definition tab
- Enter the Aid Year
- Make sure that the selected Aid Year to run the process is set for Active.

**ROAUUSIO  U.S. Specific Institution Financial Aid Options**

<table>
<thead>
<tr>
<th>Aid Year</th>
<th>0708</th>
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</table>

**Function:**
- Institutional Defaults tab
- Review the ‘Pell ID’ for accuracy

**NOTE:**
The Pell ID is validated against the SICAS TAP College Code Validation Table **RTVYTPC** to determine the appropriate TAP Codes for the institution.
## RFRBASE Fund Base Data Form

<table>
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<tr>
<th>Fund Code</th>
<th>Short Description</th>
<th>Accounts Receivable</th>
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<th>Fund Type</th>
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</tbody>
</table>

### Function:
Use the BANNER Fund Base Data Form **RFRBASE** to establish the TAP Fund Code and the Part-Time TAP Fund Code.

### Verify:
- ✔ The TAP Fund Code and
- ✔ The Part-Time Fund Code
RFRMGMT - BANNER Fund Management Form

**Fund Tab**

Function:
Use the Banner Fund Management Form RFRMGMT to review and update fund management rules.

**NOTE:** The information on the Fund, Packaging, and Disbursement tabs is important for processing TAP and should be carefully reviewed.

- The Packaging rules from this form are examined during the posting of estimated TAP and Part-Time TAP awards to the BANNER Award Form RPAAWRD.
- The award validation and calculation routines used by the SICAS TAP Estimator Award Process RPEYETAP mirrors the routines invoked when posting an award manually through the Banner Award Form RPAAWRD.

Verify:
- The Aid Year; and
- The Fund Code (For TAP or Part-Time TAP);
- Navigate to the Fund tab to review Fund Allocation information;
- Set the Budget Allocated, Total Allocated, and Available to Offer fields at a high amount to prevent the exhaustion of funds.

**NOTE:** If funds are exhausted, an error message appears on the SICAS TAP Estimator Award Process RPEYETAP report stating 'Money Not Available for Fund'.
RFRMGMT- BANNER Fund Management Form

Packaging Tab

Award Maximum/Minimum values:
- Control the upper and lower limits of valid estimated TAP and Part-Time TAP awards posted from the SICAS TAP Estimator Award Process RPRYETAP
  - For example, if a student has an estimated award of $100 calculated from the TAP Estimator Process and the award minimum is set at $200, then no estimate is inserted into the student’s award record;
  - An error message ‘Violating Min or Max’ is displayed on all output reports similar to the message received when updating an award online;
  - The minimum award should be set to $0;
  - The maximum award should cover all possible maximum amounts for each term in the Aid Year (including the summer term)

Offer Status:
- Is assigned to all estimated TAP and Part-Time TAP awards processed by the SICAS TAP Estimator Process RPRYETAP;
- The TAP Estimator Process will NOT update the actual award once a TAP or Part-Time TAP award has an Accept Status (entered either manually or by the Student Status Listing process);
- For a TAP or Part-Time TAP award to be ‘Estimated’ or ‘Offered’, the Automatic Acceptance box must NOT be checked;
- If it IS CHECKED, the TAP or Part-Time TAP estimate is automatically scheduled as an ‘Accepted’ award instead of an ‘Offered’ award on the BANNER Award Form RPAAWRD
8.8S1 RFRMGMT - BANNER 

Fund Management Form 

Packaging Tab

**CHOICE A:**

Override Need is normally checked to allow the TAP Estimator or Student Status Listing to assign an award to a student with no unmet need. TAP is a **no need fund**, therefore, a student with $0 Unmet Need can receive a $2,000 TAP or Part-Time TAP estimated award making their Unmet Need negative.

If the **Override Need** box is checked for the TAP or Part-Time TAP Fund Code on the RFRMGMT form, when the SICAS TAP Awarding Process RPEYETAP is run, the following occurs:

- If a TAP or Part-Time TAP award is posted **and** the Unmet Need is a negative amount **and** any other fund code in the award package has the Override Need box NOT checked, the message 'Award Packaged – Exceeds Unmet Need' displays on the output report. The TAP or Part-Time TAP award is posted. According to regulations, other Title IV funds in the award package may need to be reduced.

- If a TAP or Part-Time TAP award is posted **and** the Unmet Need is a negative amount **and** all other fund codes in the award package have the **Override Need** box checked, **no message appears on the output report**. The TAP or Part-Time TAP award is posted. This is because all funds in the award package can exceed need.

**CHOICE B:**

If the **Override Need** box is NOT checked for the TAP or Part-Time TAP Fund Code on the RFRMGMT form, when the TAP Awarding Process RPEYETAP is run, the following occurs:

- If a TAP or Part-Time TAP award is posted **and** the Unmet Need is a negative amount, the message ‘**Exceeds Unmet Need**’ displays on the output report.

- The TAP or Part-Time TAP award is **NOT posted**. According to regulations, other Title IV funds in the award package need to be reduced before the TAP or Part-Time TAP award is successfully posted.
RFRMGMT - BANNER Fund Management Form

Packaging Tab

The Override Requirement box **MUST** be checked to override the tracking requirements for packaging:

- If any student, individually or within a tracking group, has requirements that prevent packaging, a TAP or Part-Time TAP award will not be posted.
- Check the box next to Override Requirements to override these tracking requirements.

**NOTE:**
If the Override Requirements box is **NOT** checked and a student has outstanding packaging requirements, the message ‘Award Not Packaged – Outstanding Requirements’ displays on the output report.
**Function:**

*For Part-Time TAP Method A* - use the BANNER Fund Management Form **RFRMGMT** to establish Proration percents for the TAP Fund Code.

**Method A** is for campuses that package all students as full-time and use Banner Proration of awards for students with less than a full-time load. A campus can set the percentage of the full-time award to prorate.

**Override General Tracking Requirements:**

Controls whether the TAP or Part-Time TAP award is disbursed if there is a General Outstanding Requirement.

The Override General Tracking Requirements box *is checked* to disburse TAP or Part-Time TAP if a campus uses General Tracking Requirements to prohibit disbursements that are not linked to a specific fund code.

The box *is NOT checked* if a campus *does not* use General Tracking Requirements and all requirements that prevent disbursement are linked to fund codes.
**RFRDEFA – BANNER Default Award & Disbursement Schedule Rules Form**

Disbursement Schedule

<table>
<thead>
<tr>
<th>Term Code</th>
<th>Disbursement Percent</th>
<th>Disbursement Date</th>
<th>+/- Days</th>
<th>Activity Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>200312</td>
<td>100</td>
<td>31-DEC-2099</td>
<td></td>
<td>09-DEC-2002</td>
</tr>
<tr>
<td>200405</td>
<td>100</td>
<td>31-DEC-2099</td>
<td></td>
<td>09-DEC-2002</td>
</tr>
<tr>
<td>200408</td>
<td>100</td>
<td>31-DEC-2099</td>
<td></td>
<td>09-DEC-2002</td>
</tr>
</tbody>
</table>

**Function:**
Campuses that use the BANNER Default Award & Disbursement Schedule Rules Form RFRDEFA for the TAP and the Part-Time TAP Fund Code should set the Disbursement Date for each term code to '31-DEC-2099'.

**NOTES:**
The disbursement schedule is created when the TAP estimate turns into an actual award when the Student Status Listing (SSL) is loaded.

The disbursement schedule is not created when a TAP estimate is posted.

**RFRASCH – Banner Fund Award & Disbursement Schedule Rules Form**

Disbursement Schedule

<table>
<thead>
<tr>
<th>Term Code</th>
<th>Disbursement Percent</th>
<th>Disbursement Date</th>
<th>+/- Days</th>
<th>Activity Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>200730</td>
<td>100</td>
<td>31-DEC-2099</td>
<td></td>
<td>05-OCT-2009</td>
</tr>
<tr>
<td>200810</td>
<td>100</td>
<td>31-DEC-2099</td>
<td></td>
<td>05-OCT-2009</td>
</tr>
</tbody>
</table>

**Function:**
Campuses that use the Fund Award & Disbursement Schedule Rules Form RFRASCH for the TAP and Part-Time TAP Fund Code should set the Disbursement Date for each term code to '31-DEC-2099'.

**NOTES:**
The disbursement schedule is created when the TAP estimate turns into an actual award when the Student Status Listing (SSL) is loaded.

The disbursement schedule is not created when a TAP estimate is posted.
RTVYTAP - SICAS TAP Code Validation Form

<table>
<thead>
<tr>
<th>TAP Code</th>
<th>Default Not Assigned College Code</th>
<th>Priority</th>
<th>Non-EOP</th>
<th>EOP</th>
<th>Activity Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000</td>
<td>9</td>
<td>1</td>
<td>48</td>
<td>60</td>
<td>27-JUL-2000</td>
</tr>
<tr>
<td>0940</td>
<td>1</td>
<td>48</td>
<td></td>
<td></td>
<td>29-JAN-2001</td>
</tr>
<tr>
<td>5610</td>
<td>2</td>
<td>48</td>
<td></td>
<td></td>
<td>18-AUG-2005</td>
</tr>
</tbody>
</table>

Function:
Use this form to establish TAP Codes and Exception Points for undergraduate and graduate levels. This form is set up only once.

Populate the SICAS TAP Code Validation Form RTVYTAP with valid campus TAP Codes and Exception Points for EOP students Non-EOP undergraduate and graduate students:

- The SICAS TAP College Code Validation Table RTVYTPC is pre-populated with the appropriate TAP College Codes for each campus
- A validation occurs that allows a campus to bring in only valid TAP College Codes
- Assign priority numbers to the TAP Codes for the SICAS TAP Estimator Group and Calculate Process RPEYETAPxxxx grouping procedure to use as priorities in the calculations
- Enter the Exception Points for EOP and Non-EOP students

The Default Not Assigned College Code of ‘0000’ is required and present the first time the form is accessed:

- It is established with a priority of ’9’
- This priority number may be changed through SQL*PLUS - but it should always be the maximum priority number (e.g. the minimum priority) that exists for all the TAP Codes assigned on this form

NOTES:

✓ The default Exception Points for Non-EOP students is initially assigned at:
  - 36 for the lower division codes;
  - 48 for upper division codes;
  - 48 for graduate codes;
  - Total of 96 points between undergraduate and graduate codes

✓ The default Exception Points for EOP students is initially assigned at: 60 for upper division Codes.

✓ These point values may be changed if the campus chooses to review students at lower point levels on the Exception Report.

✓ The SICAS TAP Estimator Group and Calculate Process RPEYETAPxxxx generates the Exception Report.
# STVYTTY - SICAS State Award Term Validation Form

<table>
<thead>
<tr>
<th>HESC Term</th>
<th>HESC Year</th>
<th>Term Code</th>
<th>Description</th>
<th>Activity Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>2001</td>
<td>200130</td>
<td>Fall 2001</td>
<td>25-FEB-2001</td>
</tr>
<tr>
<td>1</td>
<td>2002</td>
<td>200220</td>
<td>Summer 2002</td>
<td>11-FEB-2002</td>
</tr>
<tr>
<td>2</td>
<td>2002</td>
<td>200230</td>
<td>Fall 2002</td>
<td>11-FEB-2002</td>
</tr>
<tr>
<td>4</td>
<td>2002</td>
<td>200310</td>
<td>Spring 2003</td>
<td>11-FEB-2002</td>
</tr>
<tr>
<td>1</td>
<td>2003</td>
<td>200320</td>
<td>Summer 2003</td>
<td>10-FEB-2003</td>
</tr>
<tr>
<td>2</td>
<td>2003</td>
<td>200330</td>
<td>Fall 2003</td>
<td>15-FEB-2003</td>
</tr>
<tr>
<td>1</td>
<td>2004</td>
<td>200420</td>
<td>Summer 2004</td>
<td>15-FEB-2004</td>
</tr>
<tr>
<td>2</td>
<td>2004</td>
<td>200430</td>
<td>Fall 2004</td>
<td>15-FEB-2004</td>
</tr>
<tr>
<td>4</td>
<td>2004</td>
<td>200510</td>
<td>Spring 2005</td>
<td>10-FEB-2004</td>
</tr>
<tr>
<td>1</td>
<td>2005</td>
<td>200520</td>
<td>Summer 2005</td>
<td>15-OCT-2004</td>
</tr>
<tr>
<td>2</td>
<td>2005</td>
<td>200530</td>
<td>Fall 2005</td>
<td>14-FEB-2005</td>
</tr>
<tr>
<td>4</td>
<td>2005</td>
<td>200610</td>
<td>Spring 2006</td>
<td>14-FEB-2005</td>
</tr>
<tr>
<td>1</td>
<td>2006</td>
<td>200620</td>
<td>Summer 2006</td>
<td>28-JUL-2005</td>
</tr>
<tr>
<td>2</td>
<td>2006</td>
<td>200630</td>
<td>Fall 2006</td>
<td>13-FEB-2006</td>
</tr>
<tr>
<td>4</td>
<td>2006</td>
<td>200710</td>
<td>Spring 2007</td>
<td>13-FEB-2006</td>
</tr>
<tr>
<td>1</td>
<td>2007</td>
<td>200720</td>
<td>Summer 2007</td>
<td>25-MAY-2006</td>
</tr>
<tr>
<td>2</td>
<td>2007</td>
<td>200730</td>
<td>Fall 2007</td>
<td>09-FEB-2007</td>
</tr>
<tr>
<td>4</td>
<td>2007</td>
<td>200810</td>
<td>Spring 2008</td>
<td>09-FEB-2007</td>
</tr>
</tbody>
</table>

**Function:**

Use this form to enter HESC Term, HESC Year, and Banner Term Codes for the current Aid Year:
- This form is set up once every Aid Year;
- Enter the HESC Term, HESC Year, and Banner Term Codes for the current Aid Year; and
- Verify that Banner Term Codes exist for all terms of the rosters to be certified.

Use the **STVYTTY** form to establish:
- HESC Term ‘2’ for HESC Year ‘0’ and
- HESC Terms for HESC Year (i.e. HESC year 2006)
- **Be sure to establish HESC Terms for HESC Years 2006 and 2007**
- These terms are required for:
  - Certification
  - Part-Time TAP processing (Method A and Method B)

**NOTE:**

Each HESC Term and HESC Year must be mapped to the Banner Term Codes on the BANNER Term Code Validation Form **STVTTERM**.
## RTVYHEC SICAS HESC Fund Code Translation Form

<table>
<thead>
<tr>
<th>Fund Code Description</th>
<th>HESC Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paul Douglas Teacher</td>
<td>NYSS</td>
</tr>
<tr>
<td>Paul Douglas Challenger</td>
<td>NYSS</td>
</tr>
<tr>
<td>TAP Award</td>
<td>TAP</td>
</tr>
<tr>
<td>Memorial Scholarship</td>
<td>ACG1</td>
</tr>
<tr>
<td>Public Employee Scholarship</td>
<td>NYSS</td>
</tr>
<tr>
<td>Byrd Scholarship</td>
<td>NYSS</td>
</tr>
<tr>
<td>Primary Care (Full Time)</td>
<td>NYSS</td>
</tr>
<tr>
<td>Primary Care (Part Time)</td>
<td>NYSS</td>
</tr>
<tr>
<td>Merit Scholarship Award ($1500)</td>
<td>EX1500</td>
</tr>
<tr>
<td>Merit Scholarship Award ($500)</td>
<td>EXC500</td>
</tr>
<tr>
<td>World Trade Center Memorial Scholarship (2001)</td>
<td>TAP</td>
</tr>
<tr>
<td>World Trade Center Memorial Scholarship (2002+)</td>
<td>TAP</td>
</tr>
<tr>
<td>Volunteer Service Recruitment Scholarship</td>
<td>VSRS</td>
</tr>
<tr>
<td>Military Service Recognition Scholarship</td>
<td>NYSS</td>
</tr>
<tr>
<td>Senator Patricia K. McGee Nursing Scholarship</td>
<td>NYSS</td>
</tr>
<tr>
<td>Flight 507 Memorial</td>
<td>NYSS</td>
</tr>
<tr>
<td>Part-time TAP</td>
<td>PTAP</td>
</tr>
</tbody>
</table>

* Required for HESC Translation use.

### Function:
Use this form to translate TAP and Part-Time TAP Fund Codes from RFRBASE to the HESC Fund Code descriptions.

### NOTE:
The SICAS TAP Estimator application requires that the TAP Fund Code and the Part-Time TAP Fund Code from the BANNER Fund Base Data Form RFRBASE be translated to the SICAS HESC Fund Code description on RTVYHEC.
RPRYCSP - SICAS TAP Code Specific Rules Form

Rules Block

<table>
<thead>
<tr>
<th>HESC Term Year</th>
<th>STVTTY Term Code</th>
<th>Term Description</th>
<th>Full-Time Tuition</th>
<th>SUNY College Full-Time Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>0</td>
<td>DOES NOT EXIST FOR HESC YEAR</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>2</td>
<td>200712</td>
<td>FALL 2007</td>
<td>$1,700.00</td>
<td>$12.50</td>
</tr>
<tr>
<td>3</td>
<td>0</td>
<td>DOES NOT EXIST FOR HESC YEAR</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>4</td>
<td>200905</td>
<td>SPRING 2009</td>
<td>$1,700.00</td>
<td>$12.50</td>
</tr>
</tbody>
</table>

Function:
Use this form to provide Tuition and Fee information for each TAP Code for each HESC Year.

**NOTE:** Set up this form once every HESC Year

- Provide information for each TAP Code used for calculations by the TAP Estimator;
- An equated entry will default into this rules form for each HESC Term Code created in the SICAS State Award Term Validation Form STVTTY;
- If a term is not defined, the message 'Does Not Exist For HESC Year' appears in the Term Description field;
- To produce valid academic year TAP estimates, the Spring and the Fall HESC Terms must have equated entries (HESC Terms '2' and '4');
- Enter the Full-Time Tuition and SUNY College Full-Time Fee (if applicable)

NOTES:
- Use these fields to calculate the TAP Estimates.
- Include anticipated increases in tuition (if required).
- When using a tuition increase on this form, also reflect the increase in the budgets assigned.
- If the tuition increase does not pass in legislation:
  - Adjust all the budget types created;
  - Re-run budgeting for all students;
  - Adjust the Full-Time Tuition on this form (RPRYCSP); and
  - Re-run the TAP Estimator for all students
RORYULE - SICAS Financial Aid Selection Rules Form

Function:
This form functions similar to the Banner Financial Aid Selection Rules Form RORRULE.

The rules displayed in this manual are examples and may not meet the requirements of an individual campus. Review the rules and edit as necessary.

Use RORYULE to create rules for each designated TAP Code:

- These rules allow a campus to write selection criteria to assign a student to a TAP Code and define what classifies a student as EOP;
- The TAP Estimator application uses the rules defined for the EOP Group Assignment to update the 'Approved Five Year Program' indicator found on the SICAS TAP Estimate Immediate Process Form ROAYTAP to 'Y';
- This indicator and the TAP Code assigned to a student are stored in the RPRYTAP table after running the SICAS TAP Estimator Group and Calculate Process RPEYETAPxxxx;
- The rules entered on this form are retained in the database;
- The ROAYTAP form can be used to assign individual students to groups one at a time or to run the SICAS TAP Estimator Group and Calculate Process RPEYETAPxxxx in Batch Mode to assign a pool of applicants to a particular group based on the selection criteria.
RORYULE - SICAS Financial Aid Selection Rules Form

To use this form:

- Select the Rule Type appropriate for the desired Selection Criteria
  - The drop down list shows the available Rule Type Descriptions
- Specify an Aid Year to display information based on that financial aid processing year
  - The default is the current Aid Year
  - The drop down list shows the Aid Year, its description, and if it is an active Aid Year
- Enter a TAP Code
  - Use the drop down list to verify a TAP Code or to check if the TAP Code is active
- Enter the Selection Criteria for the Rule Type (There is more information on entering Selection Criteria below.)
  - Pick the ‘Save’ button to compile the Selection Criteria rules
  - Go to the menu ‘Options’ and Pick ‘Compiled/Expert SQL Code’ or Pick the ‘Next Block’ button to display the compiled data from the Selection Criteria section
  - Once the Selection Criteria is entered, go to the menu ‘Options’ and Pick ‘Execute Group’ from either the Selection Criteria or the Compiled and Expert SQL window to preview those students selected based on the compiled Selection Criteria rules
- Run either the SICAS TAP Estimate Immediate Process Form ROAYTAP or the SICAS TAP Estimator Group and Calculate Process RPEYETAPxxxx to perform the actual selection
The Copy To button is available on the Selection Criteria and the Compiled and Expert SQL windows:

- There must be a valid set of rule criteria entered
- Use the Copy To button to:
  - Copy a set of rules from one Aid Year and TAP Code combination to another Aid Year and TAP Code combination; or
  - To transfer the same rules from one Aid Year to another Aid Year; or
  - From one fund code to another fund code

- For example, to copy a set of rules to another TAP Code without rules:
  1. Pick the Copy To button from either the Selection Criteria or the Compiled and Expert SQL window that has valid rules;
  2. A new ‘Copy to’ window opens (example to the right);
  3. Enter a valid Aid Year and a valid TAP Code;
  4. Pick the Copy button or ‘Insert Record’ button (from the icon bar) to copy the rules to this Aid Year and TAP Code
RORYULE - SICAS Financial Aid Selection Rules Form

The Selection Criteria section is a free-form area that accepts all Structured Query Language (SQL) functions and any SQL statement in a WHERE clause (sub-queries, exists and not exists functions, comparing one database field to another database field, etc.):

- The form will not wrap text to the next line
- To enter additional lines, Press the ‘Enter’ key and perform a ‘Next Record’ function (Pick ‘Record’ from the menu then Pick ‘Next’) after each line or use the mouse to Pick the next line to continue entering additional rules
- Each line is a new 78-character record in the Generated BANNER SQL Selection Identifier Table RORGSQL
- The compile process (Save) removes unnecessary spaces at the end of each line
- The system provides some on-screen edits that verify table column names

The rules entered in the Selection Criteria section follow this format:

- An optional open parenthesis followed by a required database column name or rule
- Followed by a required operator (=,<>,<,>,etc.)
- Followed by another database column name or value, or
- A sub-query followed by an optional close parenthesis followed by a connector (‘and’ or ‘or’; except on the last line entered)
- It is not necessary for all of these elements to be on the same line
- Multiple selection criteria may be on the same line, but the selection criteria rules should be entered in such a way that they are easy to read and understand by another user
This is an example for creating a rule:

- The '{' indicator serves as a reminder that a group selection statement can optionally be enclosed in parenthesis.
- Enter the Data Element that requires the rule.
- Select a Table from the drop down list.
- The Column Name is any Column Name from the selected table in Banner and is validated using the Oracle ALL_COL_COMMENTS table.
- For efficiency, the Column Name drop down list only displays entries from the Data Log Rules Table RORDATA.
- Add any frequently used Data Elements to this list using the Data Log Rules Form RORDATA.
Example shown above:

- Rule Type: 
  
  TAP Estimator Assignment 

- Aid Year: 
  select Aid Year

- TAP Code: 
  select TAP Code

- Selection Criteria: 
  (RCRAPP3_GRAD_OR_PROF = '2' OR RCRAPP3_GRAD_OR_PROF IS NULL)

The data element RCRAPP3_GRAD_OR_PROF indicates graduate or professional status and it is a Column Name from the RCRAPP3 table:

- Enter an Operator (=)
  
  o NOTE: the Operator drop down list shows the most common Operators

- Select a value that corresponds to the Data Element name (2)

- RCRAPP3_GRAD_OR_PROF ='2' indicates that one of the selection criteria for this group demands that the student is not a graduate or professional student

- The ')' indicator serves as a reminder that a group selection statement can optionally be enclosed in parenthesis

- Enter an OR or an AND to continue with the selection statement or add additional statements

- Pick the 'Save' button to compile (Save) the statement

- Any saved changes are automatically compiled upon exiting this section
RORYULE - SICAS Financial Aid Selection Rules Form

**Programming Hints:**

It is a good idea to enclose selection statements connected with an OR with an open parenthesis and a closed parenthesis. This is recommended even if it appears to be unnecessary. Without the parenthesis, the system may misinterpret the statement and process the data incorrectly.

This form allows the use of Outer Joins when constructing selection rules. An Outer Join is a programming technique used to combine columns from different tables where a value in one table may not have a corresponding value in another table. An Outer Join cannot be used with a table that needs to join to RCRAPP1 to find the current record.

After the compile (Save):

- Go to the menu ‘Options’ Pick ‘Compiled/Expert SQL Code’ or Pick the ‘Next Block’ button to display the compiled data from the Selection Criteria section

```sql
SELECT DISTINCT(RCRAPP1_PIDM) FROM RCRAPP3, RCRAPP1 WHERE (RCRAPP3_GRAD_OR_PROF = 'Z' OR RCRAPP3_GRAD_OR_PROF IS NULL) AND RCRAPP1_PIDM = RCRAPP3_PIDM AND RCRAPP3_INFO_CODE = RCRAPP1_INFO_CODE AND RCRAPP3_SEQ_NO = RCRAPP1_SEQ_NO AND RCRAPP1_CURR_REC_IND = 'Y' AND RCRAPP1_AIDY_CODE = RCRAPP3_AIDY_CODE AND RCRAPP3_AIDY_CODE = :AIDY AND RCRAPP1_PIDM = :PIDM
```

- The compile process adds additional information to refine the SQL select statement (see above)
- If edits are made to the compiled (expert) statement and saved, the original non-expert statement in the Selection Criteria section is deleted to assure synchronization
- The ‘Remove Record’ button must be used to delete compiled information in expert mode before changes can be made to the non-expert selection statements if the rule was created in expert mode
- On-screen editing is not performed in expert mode

Go to the menu ‘Options’ and Pick ‘Execute Group’ from either the Selection Criteria or the Compiled and Expert SQL window to display the Selected Students window

- This is a preview of the students selected based on the compiled Selection Criteria rules
- Run the SICAS TAP Estimate Immediate Process ROAYTAP or the SICAS TAP Estimator Group and Calculate Estimate Process RPEYETAPxxxx to perform the actual selection and assign students to a TAP Code
RORRULE - BANNER Financial Aid Selection Rules Form

Function:
Use this form to further restrict or validate TAP awards.

✓ RORRULE can be used to designate which students receive a TAP award and which students receive Part-Time TAP award (Method B).
✓ Campuses using Part-Time TAP Method A should write a fund disbursement rule on RORRULE allowing part-time student awards to be granted only if all the Part-Time TAP eligibility criteria are met.
✓ Banner Baseline Award Validation Process and the SICAS TAP Estimator Award Process RPEYETAP use the rules entered on this form.

The rules displayed in this manual are examples and may not meet the requirements of an individual campus. Review the rules and edit as necessary.

NOTES:
The SICAS TAP Estimate Award Process RPEYETAP posts a TAP Estimate to the BANNER Award Maintenance Form RPRAWRD even if the student reports that they expect to be enrolled in a status other than full-time:

- To prevent an estimated TAP award from being posted for students who report a part-time status, create a rule on RORRULE to select only full-time students for the TAP Fund Code;
- This method is appropriate for campuses using Part-Time TAP Method B who want to designate which students receive a TAP award and which students receive a Part-Time TAP award.
RORRULE Financial Aid Selection Rules Form

Use a rule like this for the TAP Code:

- Rule Type: Fund Awarding
- Aid Year: Select Aid Year
- Fund Code: TAP
- Selection Statement:
  
  \[
  \text{RCRAPP1}\_\text{EXP}\_\text{ENROLL\_STATUS} = '1' \text{ OR RCRAPP1}\_\text{EXP}\_\text{ENROLL\_STATUS IS NULL)}
  \]

NOTE:
This rule verifies that the student’s Expected Enrollment Status is Full-Time or Blank.

Use a rule like this for the Part-Time TAP Code:

- Rule Type: Fund Awarding
- Aid Year: Select Aid Year
- Fund Code: PTAP
- Selection Statement:
  
  \[
  \text{RCRAPP1}\_\text{EXP}\_\text{ENROLL\_STATUS IN ('2','3')}
  \]

NOTES:
This rule verifies that the student’s Expected Enrollment Status is half-time ('3') or three-quarter time ('2').
RORRULE Financial Aid Selection Rules Form

This is a Fund Disbursement Rule for campuses using Part-Time TAP Method A:

- Rule Type: Form: RORRULE
- Aid Year: Select Aid Year
- Fund Code: TAP
- Select Statement:
  
  ```
  SELECT DISTINCT(RORENRL_PIDM)
  FROM RORENRL, RPRATRM
  WHERE RORENRL_TERM_CODE = :TERM
  AND RORENRL_PIDM = :PIDM
  AND RPRATRM_TERM_CODE = RORENRL_TERM_CODE
  AND RPRATRM_PIDM = RORENRL_PIDM
  AND NOT EXISTS (SELECT 'X' FROM RTVYHEC, RPRATRM
  WHERE RTVYHEC_CODE = 0
  AND RTVYHEC_FUND_CODE = RPRATRM_FUND_CODE
  AND RPRATRM_TERM_CODE = RORENRL_TERM_CODE
  AND RPRATRM_PIDM = RORENRL_PIDM
  AND RPRATRM_ACCEPT_AMT > 0)
  AND ((RORENRL_FINAID_BILL_HR BETWEEN 6 AND 11
  AND SHKYGAS.FYCALCPTELIG(RORENRL_PIDM, RORENRL_TERM_CODE, 'E', 'A') = 'Y')
  OR RORENRL_FINAID_BILL_HR > 11)
  ```

NOTES:
This rule verifies that:
- The student does not have an Aid for Part-Time Study (APTS) award;
- Is a full-time student; or
- Is a part-time student: and
- Meets the additional eligibility requirements for Part-Time TAP

The `SHKYGAS.FYCALCPTELIG` function checks these three eligibility criteria for Part-Time TAP awards:
- Be a first-time freshman in the 2006-2007 academic year or thereafter; and
- Have earned 12 credits or more in each of two consecutive preceding semesters (a minimum of 24 credits) — this is a one-time requirement; and
- Maintains a ‘C’ average

A campus can set up other rules on RORRULE to further restrict TAP awards.
SORYULE SICAS Eligibility Selection Rules Form

Function:
Use this form to further restrict TAP awards to students who do not meet NYS residency requirements. Establish ‘Additional Non-Residence’ rules to verify non-New York State residents. If a student meets any rule for ‘Additional Non-Residence’, they are not eligible for a TAP Award.

The rules displayed in this manual are examples and may not meet the requirements of an individual campus. Review the rules and edit as necessary.

| Rule Type: | Additional Non-Residence |
| Effective Term: | 200612 Fall 2005 |
| Group Code: | |

Rule Type: Additional Non-Residence
Effective Term: The Term the Rule is established
Selection Criteria:
SELECT DISTINCT (SGBSTDN_PIDM) 
FROM SGBSTDN A
WHERE A.SGBSTDN_CODE = 'Z' AND
A.SGBSTDN_TERM_CODE_EFF = (SELECT MAX(B.SGBSTDN_TERM_CODE_EFF) 
FROM SGBSTDN B
WHERE B.SGBSTDN_TERM_CODE_EFF <=:TERM 
AND B.SGBSTDN_PIDM=A.SGBSTDN_PIDM)

NOTES:
✓ The Effective Term must be less than or equal to the current term for the Aid Year on the Banner Institution Financial Aid Options Form ROAINST.
✓ The Residence Code of ‘Z’ represents students that can be charged in-state tuition but do not meet the criteria for State Aid.
✓ The SICAS TAP Estimator Group and Calculate Process RPEYETAPxxxx and the SICAS State Award Certification Process SORYTE use the rules entered on the SORYULE form.
SICAS TAP ESTIMATOR PROCESS FLOW

**NOTE:** The TAP Estimator Processes can be run after Set Up is complete for the Aid Year to be calculated.

**Step 1 - Create A Population Selection – OPTIONAL**
(The SICAS TAP Estimator Process can be run without a desired Population Selection.)

To create a Population Selection:
- Use Banner Population Selection Definition Rules Form GLRSLCT;
- The BANNER Population Selection Extract Process GLBDATA must be run after the Population Selection ID is created;
- If a Population Selection is not identified, the SICAS TAP Estimator Process runs for all students with a Financial Aid Application;
- This may be desirable in these situations:
  A. A campus loads data files from EDE (Electronic Data Exchange) but does not want to 'Package' students immediately. Data files can continue to be loaded without running the TAP Estimator Process:
    a. When ready to start 'Packaging', first run the SICAS TAP Estimator Group and Calculate Process RPEYETAPxxxx for all students with a Financial Aid Package;
    b. Then run the BANNER Packaging Process RPEPCKG;
    c. If desired, students may be placed into Packaging Groups after each tape load;
    d. This is not considered 'Packaging'.
  B. The anticipated Tuition or SUNY College Fee changes after running the SICAS TAP Estimator Group and Calculate Process RPEYETAPxxxx:
    a. Adjust the Tuition or SUNY College Fee; and
    b. Re-run the SICAS TAP Estimator Group and Calculate Process for all students with a Financial Aid Application
SICAS TAP ESTIMATOR PROCESS FLOW

Step 2 –
SICAS TAP Estimator Group and Calculate Process
RPEYETAPxxxx

**NOTE:** This process MUST be run in UPDATE mode to calculate Part-Time TAP Awards.

See Page 42 for a detailed list of parameters for this process.

Input parameters such as Population Selection, Application Creation Begin Date (creation date of the Financial Aid Application or RCRAPP record), and Application Creation End Date can be used to restrict the population of students reported.

The process has these options:

**Option B**
- * Both Option E & Option G;
- * Groups Students into the appropriate TAP Estimate College Code Assignments and Calculates TAP Estimates;
- * Must run in Batch mode the first time this option is processed

**Option G**
- Groups Students into appropriate TAP Estimate College Code Assignments

**Option E**
- Calculates TAP Estimates—must run Option ‘G’ or Option ‘B’ first

**NOTES -**

**General Information:**
- If running the process in Batch mode, Option ‘B’ is recommended;
- TAP College Code assignments must be made using Option ‘G’ (Group Students) before Option ‘E’ (Calculate TAP Estimate) is used to Calculate TAP Estimates;
- When using Option ‘G’ (Group Students) always run Option ‘E’ (Calculate Tap Estimate) in Update Mode afterwards (failure to do this may result in inconsistent data in the system);
- This also applies when using the SICAS TAP Estimate Immediate Process Form ROAYTAP

**Grouping Process (TAP and EOP):**
- Options ‘G’ or ‘B’ perform the TAP Code and EOP Group assignments;
- The Grouping process uses the rules defined on the SICAS Financial Aid Rules Form RORYULE for the EOP Group assignment to update the ‘Approved Five Year Program’ indicator to ‘Y’.
- The ‘Approved Five Year Program’ indicator is found on the SICAS TAP Estimate Immediate Process Form ROAYTAP.
- This indicator and the TAP Code assigned to the student are stored in the RPRYTAP table after running the Grouping process;
- A student with TAP history points greater than 48 but less than 60 is eligible for a TAP Estimate if the ‘Approved Five Year Program’ indicator is set to ‘Y’
Step 2 – (cont’d.)
SICAS TAP Estimator Group and Calculate Process RPEYETAPxxxx

Exception Points:
- Students who are not rejected and have TAP history points equal to or greater than the Exception Points show up on the SICAS TAP Estimator Process Exception Report RPEYETAPxxxx_01;
- Graduate students with a total point accumulation (undergraduate and graduate points) that is equal to or greater than 96 – diff, where diff = 48 – Exception Points, will also appear on the Exception Report;
- A campus can change the Exception Points at any time on the SICAS TAP Code Validation Form RTVYTAP.

Estimate (TAP or Part-Time TAP):
- Option ‘E’ or Option ‘B’ performs the calculations required to derive a reasonable TAP or Part-Time TAP Estimate;
- When run in UPDATE mode, TAP and Part-Time TAP Awards are calculated and all student information obtained during the calculations, such as the TAP Schedule, Net Taxable Balance (NTB) derived, and any reject reasons, are stored in the SICAS TAP Estimate Information Repeating Table RPRYTAP;
- This data may be viewed at any time on the SICAS TAP Estimate Immediate Process Form ROAYTAP.

Term:
- If a student has only one term defined (Fall or Spring) in their Aid Period, the Estimated TAP award is divided in half;
- If neither term exists (Fall or Spring) in their Aid Period, a reject message ‘Aid Period invalid for TAP Estimate’ is posted and no TAP Estimate is calculated.

NOTES:
1. It is advisable to always run this process in Audit Mode and examine the output prior to running the process in Update Mode;
2. When satisfied with the results in Audit Mode, run the process in Update Mode;
3. After the process is run in Update Mode, the results for TAP Estimates are stored in the table RPRYTAP and can be viewed on the TAP portion of the ROAYTAP form.
Step 2 – (cont’d.)
SICAS TAP Estimator Group and Calculate Process RPEYETAPxxxx

Part-Time TAP:
The SICAS TAP Estimator Group and Calculate Process RPEYETAPxxxx (when run in Update Mode) uses the SHKYGAS.FYCALCPTELIG function to review the three additional Part-Time TAP eligibility criteria for all students who are eligible for TAP regardless of their expected enrollment status and posts the eligibility codes to the SICAS Part-Time TAP Eligibility Base Table RPBYPTT.

Students that meet the three additional Part-Time TAP eligibility criteria are flagged with an asterisk ‘*’ on the RPEYETAPxxxx report.

Campuses using Method B:
- The student is eligible for Part-Time TAP; and has an expected enrollment of ‘2’ or ‘3’;
- RPEYETAPxxxx calculates the Part-Time TAP Estimate using a percentage of their TAP Estimate;
- This percentage is defined on the BANNER Crosswalk Validation Form GTVSDAX.

Campuses using Method A:
- Should run the RPEYETAPxxxx process in Update Mode for All Students on a frequent basis;
- Using the function SHKYGAS.FYCALCPTELIG from the BANNER Financial Aid Selection Rules Form RORRULE only reviews the data and cannot update data in the RPBYPTT table

After the process is run in Update Mode, the results for Part-Time TAP Estimates are stored in the table RPRYTAP and can be viewed on the Part-Time TAP portion of the ROAYTAP form.
Step 2 – (cont’d.)

SICAS TAP Estimator Group and Calculate Process RPEYETAPxxxx

Assumptions:
The SICAS TAP Estimator Group and Calculate Process RPEYETAPxxxx uses the following assumptions when calculating estimates. These assumptions may account for discrepancies that can occur between actual and estimated awards.

1. The student’s dependency status for State Awards will be the same as the dependency status used to determine Federal awards unless the Override indicator for State Dependency Status is set to ‘Y’ on the ROAYTAP form;

2. The student’s residency status is determined by using the State of Legal Residence on the current Needs Analysis Application:
   a. If this field is blank, but the student’s address on the current Needs Analysis Application is a New York address, the student will be considered a New York resident;
   b. If a student is considered a dependent, the parent’s State of Legal Residence is also checked
   c. If it is blank or New York, the record will not be rejected

3. When the Adjusted Gross Income (AGI) field is blank on the current Needs Analysis Application, the amount(s) listed under Income Earned from Work (IEW) will be used instead to calculate the Net Taxable Balance (NTB) to perform the TAP and Part-Time TAP Estimate;

4. The standard State deductions are subtracted from the AGI, or the IEW (if the AGI is blank) to determine the NTB and thousand dollars is also subtracted for each dependent exemption other than a spouse:
   a. Certain assumptions were made about State Tax filing status and exemptions claimed from the information supplied on the current Needs Analysis Application;
   b. The estimate will include a reduction for other siblings attending college

5. Students who have received more than two years of TAP are usually subject to an award reduction of $100 annually (generally known as the upper cut):
   a. The TAP Certification History Table SOBYTRH is checked to obtain the number of points the student has accumulated;
   b. If the points are equal to or greater than 24 or the year in college reported is greater than two, the reduction is applied

6. The RPEYETAPxxxx process only rejects a TAP Estimate for Exhausted Points for Program of Study (EXHAUST) when the points found in the TAP Certification History Table SOBYTRH exceed the maximum allowed for the program of study;

7. Other reasonable assumptions are also made for many of the fields if they were left blank when the Free Application for Federal Student Aid (FAFSA) was completed.

NOTES:
✓ The RPEYETAPxxxx process will run from command line, batch, or job submission
✓ The command line format is: sqr<path>rpeyetapxxxx userid/password -mrpeyetapxxxx.sqm
✓ PAGE 46 has a sample report from the SICAS TAP Estimator Group and Calculate Process. The field TAP PTS USED shown in the output listing comes from the SICAS TAP Certification Table SOBYTRH
SICAS TAP ESTIMATOR PROCESS FLOW

Step 3 - SICAS TAP Estimator Award Process RPEYETAP

Function:
This process will run for all students with records in the RPRYTP table in a given Aid Year if neither a Population Selection or a TAP Estimate Creation Begin and End Date are identified. **It is advisable to always run this process in Audit Mode and examine the output prior to running the process in Update Mode.**

After the process is run in Update Mode, the results are stored in the BANNER Award Maintenance Table RPRAWRD and can be viewed on RPAAWRD or the BANNER Package Maintenance Form RPAAPMT.

When run in Update Mode, the process moves the yearly TAP Estimate, which is stored in the RPRYTP table, to the RPRAWRD table if all validation routines are satisfied:
- If an award cannot be posted, the rejection reason will appear on the output report and be updated in the table RPRYTP;
- The TAP Award rejection reasons can be viewed on the TAP portion of the SICAS TAP Estimate Immediate Process Form ROAYTAP

See Page 43 for a detailed list of parameters for this process.
See Page 45 for a sample report from the SICAS TAP Estimator Award Process.

NOTES:
- The RPEYETAP process will run from command line, batch, or job submission
- VMS format: RPEYETAP USERID PASSWORD SEQNO RPEYETSP
- UNIX format: rpeyetap.shl userid password seqno RPEYETAP

Step 4 - SICAS TAP Estimator Award Process RPEYETAP Method B Only

Function:
Campuses using Method B need to run the SICAS TAP Estimator Award Process RPEYETAP for the Part-Time TAP Fund Code (refer to RFRBASE and RTVYHEC).

The Part-Time TAP award rejection reasons can be viewed on the Part-Time TAP portion of the ROAYTAP form.

ADJUSTING TAP ESTIMATES

If necessary, a campus can make adjustments to the TAP and Part-Time TAP Estimates. The SICAS TAP Estimate Immediate Process Form ROAYTAP has a section to review and override information for TAP and Part-Time TAP Estimates.
SICAS TAP Estimate Immediate Process Form - ROAYTAP

**TAP**

**TAP Estimate Block**

- **Yearly TAP Estimate:** 
- **TAP College Code Assigned:** 
- **Federal Dependency Status:** 
- **Schedule used for TAP Estimate:** 
- **Net Taxable Balance:** 
- **Certification History Points:** 
- **APTS Derived Dependency Code:** 
- **Approved Five Year Program:**

**TAP Estimate Override**

- **Override for State Dependency Status:** 
- **Override Schedule used for TAP Estimate:** 
- **Override Net Taxable Balance:** 
- **Override History Points:** 
- **Override APTS Dependency Code:** 
- **Recalculation Needed**

**Immediate Process Block**

- **Automatic TAP Estimate Calculation Action indicator:** 
- **Automatic TAP Estimate Award Routine Action Indicator:**

**Function:**

Use this form to view information about TAP and Part-Time TAP Estimates and to implement TAP Estimate Overrides.

**TAP Estimate Block**

This section of the ROAYTAP form displays information on the TAP Estimate. The information includes the TAP Estimate Reject Reason and the Reason Estimate Not Posted.

**Rejection Reasons**

- **ANONRES** Meets additional non-residence rules
- **EXHAUST** Exhausted points for program of study
- **NODEPST** Dependency status indeterminable
- **NOPRAGI** Unable to determine Parent’s AGI
- **NOSTAGI** Unable to determine Student’s AGI
- **NOTASSG** Not assigned a TAP College Code
- **NTBEXCD** Net Taxable Balance (NTB) exceeds limit
- **OUTSCHG** Student charged Out-of-State
- **PNONRES** Parent(s) of dependent not a New York State resident
- **REJDSAR** Rejected SAR – No EFC determined
- **REJAPRD** Aid Period invalid for TAP Estimate
- **SNONRES** Student not a New York State resident
SICAS TAP Estimate Immediate Process Form - ROAYTAP

TAP Estimate Override

Function:
This section of the ROAYTAP form is used to override items used in calculating a TAP Estimate. On the TAP portion of the form, a campus can override a student’s dependency status, Net Taxable Balance, the Schedule used in determining the TAP Estimate, and indicate if a student is in an Approved Five Year Program. Any changes made to any of the fields will cause the Recalculation Needed field to change to a 'Y'.

Override Federal Dependency Status:
- To override the Federal Dependency Status used in the TAP Estimate calculations, enter the desired value in the Override for State Dependency Status field and Save the transaction.
- Go to the Immediate Process Block and perform an Automatic TAP Estimate Calculation by entering ‘E’ in the Action Indicator field and Save the transaction.
- The Federal Dependency Status shown on the form will not change, however all the calculations for the TAP Estimate will be done using the Override for State Dependency Status.
- If changing an Independent Student to a Dependent Student, the parent’s income information must exist on the BANNER Need Analysis Form RNANAx. If it does not, the TAP Estimate Reject Reason ‘Unable to Determine Parent’s AGI’ will display.

Override the Schedule or Net Taxable Balance:
- To override the Schedule or the Net Taxable Balance used in the TAP Estimate calculations, enter the desired value in the Override Schedule used for TAP Estimate or the Override Net Taxable Balance field and Save the transaction.
- Go to the Immediate Process Block and perform an Automatic TAP Estimate Calculation by entering ‘E’ in the Action Indicator field and Save the transaction.
- After the Estimate Calculation, the value of the override appears in the Override Schedule used for TAP Estimate or the Override Net Taxable Balance field.
### Immediate Process Block

Only one Immediate Process can be run at a time.

The **Automatic TAP Estimate Calculation Action Indicator** has these options:

- **Option E** Calculate TAP Estimates
- **Option G** Group Students into appropriate TAP Estimate College Code Assignments
- **Option B** Both E & G – Group Students into the appropriate TAP Estimate College Code Assignments and Calculate TAP Estimates

When using the Group Students *Option ‘G’* always run the **Calculate Tap Estimate Option ‘E’** afterwards (Failure to do this may result in inconsistent data in the system)

The **Automatic TAP Estimate Award Routine Action Indicator** has this option:

- **Option I** Immediate Award Routine
SICAS TAP Estimate Immediate Process Form - ROAYTAP

Part-Time TAP

Function:
Use the Part-Time TAP section of the SICAS TAP Estimate Immediate Process Form ROAYTAP to view information about Part-Time TAP Estimates.

This form displays:
- The three additional eligibility criteria for Part-Time TAP;
- Whether or not the student met the eligibility requirement;
- (If not met) the reason if the requirement was not met

There are overrides for First-Time Freshman 2006-07 or later and Two Consecutive Semesters with 12 credits:
- To override either of these criteria, click in the Override field and Save;
- Return to the TAP portion of the form and run the Automatic TAP Estimate Calculation using Option 'B': (‘Override’ will now appear in the Reason Eligibility Not Met field);
- A campus cannot override The First-Time Freshman 2006-07 criteria if the Reason Eligibility Not Met is ‘Student received first State Award’.

The Reasons Eligibility Not Met for the First-Time Freshman criterion are:
- Admit Record does not exist for a term on or after 2006
- Student record does not exist for a term on or after 2006
- Student received first State Award CCYY – cannot override

The Reasons Eligibility Not Met for Two Consecutive Semesters with 12 credits criterion are:
- Student did not complete 12 credits in any semester
- Invalid: xxxxxx – where xxxxxx refers to the Term Code
## SICAS TAP Estimator Group and Calculate Process Parameters

<table>
<thead>
<tr>
<th>Name</th>
<th>Required</th>
<th>Description</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run Sequence Number</td>
<td>No</td>
<td>Sequence Number obtained through job submission</td>
<td>123456 (Command Line Only)</td>
</tr>
<tr>
<td>Output Directory Name</td>
<td>No</td>
<td>Directory location for output file</td>
<td>Default: SYS$LOGIN (Command Line Only)</td>
</tr>
<tr>
<td>Run Type</td>
<td>Yes</td>
<td>Can run process in [A]udit or [U]pdate mode. Audit mode-no tables updated;</td>
<td>[A]udit or [U]pdate Default is Audit</td>
</tr>
<tr>
<td></td>
<td></td>
<td>can be run repeatedly. Update mode is final. Always run process in Audit</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>mode until ready to run in Update mode.</td>
<td></td>
</tr>
<tr>
<td>Aid Year</td>
<td>Yes</td>
<td>Enter the Aid Year being processed</td>
<td>Ex. 0708</td>
</tr>
<tr>
<td>Application</td>
<td>No</td>
<td>Application code of the Population Selection. If used, also enter values for</td>
<td>Ex. FINAID</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Selection ID and Creator ID.</td>
<td></td>
</tr>
<tr>
<td>Selection ID</td>
<td>No</td>
<td>Selection ID of the Population Selection. Enter only if using Application</td>
<td>Ex. EOPFRESH</td>
</tr>
<tr>
<td>Creator ID</td>
<td>No</td>
<td>Code and Selection ID.</td>
<td>Ex. CLARKSA</td>
</tr>
<tr>
<td>User ID</td>
<td>No</td>
<td>User ID of person who created the Population Selection. Enter only if using</td>
<td>Ex. CLARKSA</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Application, Selection ID, and Creator ID.</td>
<td></td>
</tr>
<tr>
<td>Student ID</td>
<td>No</td>
<td>Use to process a single student</td>
<td>Ex. @00045900</td>
</tr>
<tr>
<td>Creation Begin Date</td>
<td>No</td>
<td>Use standard date format (DD-MM-YY or DD-MON-YYYY) The date uses the field</td>
<td>Ex. 12-JAN-2007</td>
</tr>
<tr>
<td></td>
<td></td>
<td>RCRAPP1_CREATE_DATE which is the date the RCRAPP record was created.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Select any RCRAPP record created on or after the Begin Date and up to and</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>including the End Date.</td>
<td></td>
</tr>
<tr>
<td>Creation End Date</td>
<td>No</td>
<td>Use standard date format. Enter only if using a Begin Date. The End Date</td>
<td>Ex. 15-MAY-2007</td>
</tr>
<tr>
<td></td>
<td></td>
<td>must be greater than or equal to the Begin Date.</td>
<td></td>
</tr>
<tr>
<td>Processing Indicator</td>
<td>Yes</td>
<td>Execute process for: [G]-Group Students into appropriate TAP Estimate</td>
<td>[G]rouping</td>
</tr>
<tr>
<td></td>
<td></td>
<td>College Code Assignments. [E]-Calculate TAP Estimates. [B]-Group students</td>
<td>[E]stimate</td>
</tr>
<tr>
<td></td>
<td></td>
<td>into the appropriate TAP Estimate college Code Assignments and Calculate</td>
<td>[B]oth</td>
</tr>
<tr>
<td></td>
<td></td>
<td>TAP Estimates.</td>
<td></td>
</tr>
<tr>
<td>Lines Per Page</td>
<td>Yes</td>
<td>Number of lines per page. Minimum is 10. Maximum is 99.</td>
<td>Ex. 55 Default is 60 (Command Line Only)</td>
</tr>
<tr>
<td>Execute</td>
<td>Yes</td>
<td>[Y]es-Run the process; [N]o-Exit</td>
<td>[Y]yes or [N]o Default is Yes (Command Line Only)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If a mistake is made entering parameters, enter [N]o and restart.</td>
<td></td>
</tr>
</tbody>
</table>

If all optional parameters are left blank, the process will run for all RCRAPP1 records.
# SICAS TAP ESTIMATOR AWARD PROCESS – RPEYETAP

## Parameters

<table>
<thead>
<tr>
<th>Name</th>
<th>Required</th>
<th>Description</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run Type</td>
<td>Yes</td>
<td>Can run process in [A]udit or [U]pdate mode. Audit mode-no tables updated; can be run repeatedly. Update mode is final. Always run process in Audit mode until ready to run in Update mode.</td>
<td>[A]udit or [U]pdate Default is Audit</td>
</tr>
<tr>
<td>Aid Year</td>
<td>Yes</td>
<td>Enter the Aid Year being processed Use Banner format</td>
<td>Ex. 0708</td>
</tr>
<tr>
<td>TAP Fund Code</td>
<td>Yes</td>
<td>Enter the TAP Fund Code Enter the Part-Time TAP Fund Code</td>
<td>Ex. TAP Ex. PTAP</td>
</tr>
<tr>
<td>Update Existing Awards</td>
<td>Yes</td>
<td>Updates existing TAP Estimates. The Award Process will never update an Actual TAP Award with an Estimate.</td>
<td>[Y]es or [N]o</td>
</tr>
<tr>
<td>Application</td>
<td>No</td>
<td>Application code of the Population Selection. If used, also enter values for Selection ID and Creator ID.</td>
<td>Ex. FINAID</td>
</tr>
<tr>
<td>Selection ID</td>
<td>No</td>
<td>Selection ID of the Population Selection. Enter only if using Application Code</td>
<td>Ex. EOPFRESH</td>
</tr>
<tr>
<td>Creator ID</td>
<td>No</td>
<td>Banner ID of person who created the Population Selection. Enter only if using Application Code and Selection ID.</td>
<td>Ex. CLARKSA</td>
</tr>
<tr>
<td>User ID</td>
<td>No</td>
<td>User ID of person who created the Population Selection. Enter only if using Application, Selection ID, and Creator ID</td>
<td>Ex. CLARKSA</td>
</tr>
<tr>
<td>Student ID</td>
<td>No</td>
<td>Use to process a single student</td>
<td>Ex. @00045900</td>
</tr>
<tr>
<td>Creation Begin Date</td>
<td>No</td>
<td>Use standard date format (DD-MM-YY or DD-MON-YYYY) The date uses the field RCRAPP1_CREATE_DATE which is the date the RCRAPP record was created. Select any RCRAPP record created on or after the Begin Date and up to and including the End Date.</td>
<td>Ex. 12-JAN-2007</td>
</tr>
<tr>
<td>Creation End Date</td>
<td>No</td>
<td>Use standard date format. Enter only if using a Begin Date. The End Date must be greater than or equal to the Begin Date.</td>
<td>Ex. 15-MAY-2007</td>
</tr>
<tr>
<td>Lines Per Page</td>
<td>Yes</td>
<td>Number of lines per page. Minimum is 10. Maximum is 99.</td>
<td>Ex. 55 Default is 60 (Command Line Only)</td>
</tr>
<tr>
<td>Execute</td>
<td>Yes</td>
<td>[Y]es-Run the process; [N]o-Exit If a mistake is made entering parameters, enter [N]o and restart</td>
<td>[Y]es or [N]o Default is Yes (Command Line Only)</td>
</tr>
</tbody>
</table>

If all optional parameters are left blank, the process will run for all RCRAPP1 records.
SAMPLE OUTPUT – RPEYETAPXXXX SICAS TAP Estimator Group and Calculate Process

09-AUG-2007 13:05 PM
Aid Year: 0708

<table>
<thead>
<tr>
<th>LAST NAME</th>
<th>FIRST NAME</th>
<th>ID NUMBER</th>
<th>NTB</th>
<th>TAP EST</th>
<th>TAP CODE</th>
<th>D/I</th>
<th>TAP PTS.</th>
<th>SCHED</th>
<th>REJECT REASON</th>
</tr>
</thead>
<tbody>
<tr>
<td>Riley</td>
<td>Marka</td>
<td>TRAIN05</td>
<td>$</td>
<td>0</td>
<td>3,025</td>
<td>091.0</td>
<td>I</td>
<td>0</td>
<td>M</td>
</tr>
<tr>
<td>Loxy</td>
<td>Louis</td>
<td>TRAIN08</td>
<td>$</td>
<td>250</td>
<td>3,025</td>
<td>091.0</td>
<td>D</td>
<td>12</td>
<td>E</td>
</tr>
<tr>
<td>Makey</td>
<td>David</td>
<td>TRAIN09</td>
<td>$</td>
<td>97,876</td>
<td>0</td>
<td>091.0</td>
<td>D</td>
<td>0</td>
<td>E Net Taxable Balance (NTB) Exceeds Limit</td>
</tr>
<tr>
<td>Ramsey</td>
<td>Clark</td>
<td>* TRAIN11</td>
<td>$</td>
<td>500</td>
<td>2,225</td>
<td>091.0</td>
<td>D</td>
<td>0</td>
<td>E</td>
</tr>
</tbody>
</table>

09-AUG-2007 13:05 PM
Aid Year: 0708

* Denotes Part-Time TAP Eligible

* * * REPORT CONTROL INFORMATION * * *

SQRNAME: RPEYETAP0708
RELEASE: 7.8S1.1
RUN SEQUENCE NUMBER: 216737
OUTPUT FILE(S): disk$sicas[clarksa.dat\_c|rpeyetap0708_216737.lis
RUN TYPE: U Update
AID YEAR: 0708
APPLICATION:
SELECTION:
CREATOR ID:
USER ID:
STUDENT ID:
BEGIN DATE:
END DATE:
GROUPING, ESTIMATE, OR BOTH: B
FRESHMAN TYPE: S
FRESHMAN VALUES(S): 0 0 E N
LINES PER PAGE: 60
EXECUTE REPORT: Yes
ELIGIBLE FOR PART-TIME TAP: 0
RECORDS PROCESSED: 4

* Denotes Part-Time TAP Eligible = Student meets TAP eligibility requirements and the three additional requirements for Part-Time TAP
SAMPLE REPORT – RPEYETAP SICAS TAP Estimator Award Process

<table>
<thead>
<tr>
<th>LAST NAME</th>
<th>FIRST NAME</th>
<th>ID</th>
<th>NTB</th>
<th>TAP ON BANNER</th>
<th>TAP ESTIMATE</th>
<th>DIFFERENCE</th>
<th>REASON AWARD NOT PROCESSED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kiley</td>
<td>Marcia</td>
<td>TRAIN05</td>
<td>0</td>
<td>3,025</td>
<td>3,025</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Loresy</td>
<td>Louis</td>
<td>TRAIN08</td>
<td>250</td>
<td>2,025</td>
<td>3,025</td>
<td>1,000</td>
<td>ACCEPTED TAP AWARD EXISTS</td>
</tr>
<tr>
<td>Makew</td>
<td>David</td>
<td>TRAIN09</td>
<td>97,876</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>NO AWARD UN BANNER AND TAP ESTIMATE IS ZERO</td>
</tr>
<tr>
<td>Ramsey</td>
<td>Clark</td>
<td>TRAIN11</td>
<td>500</td>
<td>0</td>
<td>2,225</td>
<td>2,225</td>
<td>VIOLATES FUND AWARDING RULES</td>
</tr>
</tbody>
</table>

**REPORT CONTROL INFORMATION**

RUN TYPE: U UPDATE
AID YEAR: 0708 Aid Year 2007-2008
TAP FUND CODE: TAP
STUDENT ID:
CREATION BEGIN DATE:
CREATION END DATE:
LINES PER PAGE: 60
RECORD COUNT: 4
NORMAL END OF PROGRAM