

Financial Aid Awards Data Marts

Business Rules

Last Updated: 23 June 2003

Overview

Purpose

The Financial Aid Awards data mart is intended to support reporting on financial aid awards made to students. This data mart is designed to answer the basic question: *how much aid of what types was awarded to what types of students?*

Overview of measures and dimensions

To this end, the data mart includes several different measures related to awards (e.g. amount offered, amount paid) and dimensions that give information related to the award recipient (e.g. race/ethnicity) and the award itself (e.g. fund source). This allows reporting on different measures related to awards by recipient characteristics and award characteristics. One example of this is the total offered amount (measure) of awards given to students in the college of Liberal Arts and Sciences (recipient characteristic) from Federal funds (award characteristic).

Grain

The level of detail (i.e. grain) included in the data mart is that each individual award to each student per year (or term) has a separate record in the data mart.

Intended uses

The following are the intended users and types of reporting supported by this data mart:

- Ad-hoc reporting and analysis by the Financial Aid Offices on total aid awarded by recipient and award characteristics
- Ad-hoc reporting by Academic Colleges and Departments on total aid awarded to students within their units as well as lists of awards made to individual students within their units
- Mandated reporting on Financial Aid awards performed by Institutional Research units

In addition, separate data sets are provided to allow for reporting at either the year or term level. This data mart also supports reporting on either information frozen as of the end of the given year or term, or information frozen as of the census date.

Data included

The following sections describe the measures and dimensions that are included in the data mart.

Measures

The following measures related to aid awards are available to report on using this data mart:

- Current Offer amount and date
- Original Offer amount and date
- Accepted amount and date
- Declined amount and date
- Cancelled amount and date
- Authorized amount and date
- Memo aid amount and date
- Paid amount and date

- Gross amount and date (note: Gross amount is a value derived in the EDW. For most types of awards this is the same as the Paid amount, but for certain types of loans this contains the full amount of the loan before any applicable fees are taken out)

Dimensions

The following characteristics of awards are available to report the measures by:

- Fund code
- Fund source
- Fund type
- Fund detail code
- Title IV indicator

The following characteristics of award recipients are available to report the measures by:

- Person Biographic info: name, address
- Person Demographic info: race/ethnicity, citizenship, gender
- Student Curriculum info: college, department, academic program (major/concentration, degree)
- Student Classification info: student type, student level, residency, class
- Student Registered Hours: enrolled credit hours
- Financial Aid Needs Analysis info: parent, student, family contribution; budget total; total resource; gross need; unmet need
- Financial Aid Satisfactory Academic Progress (SAP): SAP code

Business rules

As indicated above, this data mart supports reporting on either information frozen as of the end of the given year or term or information frozen as of the census date. To accomplish this, separate update rules are applied to end of year/term vs. census information. For each type of record, the following sections describe the business rules that are applied to the data mart to determine when to create new records, when to update (and stop updating) records, and what records to include (record selection).

End of Year/Term Information

The following sections apply to the records in the data mart that contain information frozen as of the end of the given year or term.

- 1. New records (end of year/term):** The following rules determine when new records are created in the data mart:
 - 1.1. A new record is created in the data mart each time a new award record is added in the EDW (regardless of the student's enrollment status).
 - 1.2. All award and recipient characteristics related to the award are also populated at the time a new record is created (based on the record selection rules described below).
- 2. Updates (end of year/term):**
 - 2.1. YEAR: The following rules determine when existing records are updated for reporting on current information at the year level.
 - 2.1.1. Existing records continue to be updated during the entire aid processing period, starting February 1st for the Fall term and continuing through December 15th of the following year. Each night when the data mart is loaded any new information overwrites the existing records. Once the end of the processing period is reached, records are no longer updated and thus they are effectively 'frozen' as of the end of the processing period for the given year.
 - 2.1.2. This applies to all related information: Award records and characteristics, Biographic and Demographic information, Curriculum and Student classification, Enrollment, and Needs Analysis information.
 - 2.2. TERM: The following rules determine when existing records are updated for reporting on current information at the term level.

- 2.2.1. Award records and characteristics also continue to be updated during the entire aid processing period. Each night when the data mart is loaded any new information overwrites the existing records. Once the end of the processing period for the year is reached, records are no longer updated and thus they are effectively 'frozen' as of the end of the processing period for the given year. This helps ensure that the sum of the term Award amounts will be equal to yearly Award amounts. If term Award records were frozen at the end of the term (instead of being updated through the end of the processing period), updates made after that point would not be reflected in the data mart.
- 2.2.2. The other related information only continues to be updated until the end of the term: Biographic and Demographic information, Curriculum and Student classification, and Enrollment.
- 2.2.3. As indicated above, Needs Analysis information is not included at the term level.

3. Record selection (end of year/term): The following rules determine which records are included and used to populate information in the data mart.

- 3.1. AWARD:
 - 3.1.1. For year-based data mart records, the Award record for the award year is used to populate the Award characteristics.
 - 3.1.2. For term-based data mart records, the Award record for the award term is used to populate the Award characteristics.
- 3.2. PERSON (Year and Term): At the time a new record is created in the data mart, the current Person History record as of that date is used to populate the Biographic and Demographic information. Note: the Person History record in the EDW is date-based and there is a single 'current' record per person. For Address information in the EDW, there can be multiple active, current addresses for a given address type in the same timeframe for the same person. Current records with the maximum sequence number for types of "PR" (home address) and "MA" (mailing address) are included. Essentially, this pulls in the most recently added current Address record for these types.
- 3.3. STUDENT: Only students that receive awards are included, but they are included regardless of whether or not they have submitted an aid application.
- 3.4. STUDENT (Year): For year-based data mart records, the following rules determine which Student History record is used to populate the Curriculum and Student classification information:
 - 3.4.1. Use the Student History record that is 'current' as of the Effective Term from the Banner ROBINST table. The ROBINST Effective Term is used by the Financial Aid Offices to tell Banner which term's information to use during Packaging and Disbursement for the given aid year.
 - 3.4.2. To identify the Student History record that is current as of the ROBINST Effective Term, use the most recent (i.e. current) record for the max Student Effective Term that is less than or equal to the ROBINST Effective Term.
 - 3.4.3. Note: the Student History record is Effective Term-based in the EDW and there is a single 'current' record for each Effective Term. The Effective Term stored in the record represents the term the record became (or will become) active and remains current until a new record is created, so there is not necessarily a separate record for each term.
- 3.5. STUDENT (Term): For term-based data mart records, the following rules determine which Student History record is used to populate the Curriculum and Student classification information:
 - 3.5.1. Use the Student History record that is 'current' as of the term the award record is for.
 - 3.5.2. To identify the Student History record that is current as of the award term, use the most recent (i.e. current) record for the max Student Effective Term that is less than

or equal to the award term. See above note on the Student History record in the EDW.

3.6. REGISTERED HOURS:

3.6.1. For year-based data mart records, the Registered Hours record for the same term as the ROBINST Effective Term is used to populate the enrollment information. Note: from July 04 through March 04 enrollment information in Banner will be populated by the General Person/General Student (GPGS) interface from legacy systems. During this time period, the EDW will contain a single enrollment record for each registered student for each term containing the total number of enrolled credit hours. The exception to this is UIUC summer, which will have a separate credit hours total for each session and also a total for the summer.

3.6.2. For term-based data mart records, the Registered Hours record for the award term is used to populate the enrollment information. See above note on the Registered Hours record in the EDW.

3.7. APPLICANT STATUS:

3.7.1. For year-based data mart records, the Applicant Status record for the award year is used to populate the Needs Analysis information.

3.7.2. For term-based data mart records, no Needs Analysis information is included, as this information only exists at the year level.

Census Information

The following rules apply to the records in the data mart that contain information for the given year as of the census date.

4. New records (census): The following rules determine when new records are created in the data mart:

4.1. A new record is created in the data mart each time a new award record is added in the EDW for an enrolled student.

4.2. All award and recipient characteristics related to the award are also populated at the time a new record is created (based on the record selection rules described above).

5. Record selection (census): The following rules determine which records are included and used to populate information in the data mart.

5.1. YEAR: Only students that are enrolled (credit hours > 0) as of the census date for the Fall term or the given year and receive awards are included, but they are included regardless of whether or not they have submitted an aid application. This includes students that are enrolled as of the census date, but do not have any awards as of the census date and then later receive an award.

5.2. TERM: Only students that are enrolled (credit hours > 0) as of the census date for the given term and receive awards are included, but they are included regardless of whether or not they have submitted an aid application. This includes students that are enrolled as of the census date, but do not have any awards as of the census date and then later receive an award.

5.3. The same rules for selecting records indicated above for end of year/term also apply to census information for the following: Awards, Person, Student, Registered hours, and Applicant status information.

6. Updates (census):

6.1. YEAR: The following rules determine when existing records are updated for reporting on current information at the year level.

6.1.1. As above, Award characteristics begin to be updated at the start of the aid processing period (February 1st for the Fall term). Each night when the data mart is loaded any new information overwrites the existing records. **The date when award information should no longer be updated for census reporting has not yet been determined.** Records are effectively 'frozen' for the year as of this date. *Note:*

It may be desirable to have the same freeze date for both current and census reporting. However, in the past IR offices have received their final extract at an earlier date. To ensure reproducible results the records should be frozen before final reports are produced, and December 15 may be after the dates when reports need to be created.

- 6.1.2. Biographic and Demographic, Curriculum and Student classification, and Enrollment information is updated starting at the beginning of the processing period (Feb 1) and continuing until the official census date for the Fall term of the given aid year. Once the Fall census date is reached, these records are no longer updated and thus they are effectively 'frozen' as of Fall census date for the given year. The census date used is the Census 2 Date from the Part of Term setup in Banner (SOATERM - Part of Term and Web Registration block) for the Fall term of the given aid year.
- 6.1.3. Needs Analysis information continues to be updated during the entire aid processing period.
- 6.2. TERM: The following rules determine when existing records are updated for reporting on current information at the term level.
 - 6.2.1. Award records and characteristics also continue to be updated during the entire aid processing period. Each night when the data mart is loaded any new information overwrites the existing records. Once the end of the processing period is reached, records are no longer updated and thus they are effectively 'frozen' as of the end of the processing period for the given year.
 - 6.2.2. For term-based census reporting, Award characteristics also begin to be updated at the start of the aid processing period (February 1st for the Fall term). Each night when the data mart is loaded any new information overwrites the existing records. **The date when award information should no longer be updated for census reporting has not yet been determined.** Records are effectively 'frozen' for the term as of this date. Keeping the same freeze date for the year and term helps ensure that the sum of the term Award amounts will be equal to yearly Award amounts. If term Award records were frozen at the end of the term (instead of being updated through the end of the processing period), updates made after that point would not be reflected in the data mart.
 - 6.2.3. Biographic and Demographic, Curriculum and Student classification, and Enrollment information is updated starting at the beginning of the processing period (Feb 1) and continuing until the official census date for the term. Once the census date for the term is reached, these records are no longer updated and thus they are effectively 'frozen' as of census date for the given term. The census date used is the Census 2 Date from the Part of Term setup in Banner (SOATERM - Part of Term and Web Registration block) for the given term.
 - 6.2.4. Needs Analysis information continues to be updated during the entire aid processing period.

Security

The following security options are supported by the Financial Aid Awards data mart.

Organization

Security can be applied to only allow users to access information on aid recipients from their own Campus, College, or Department. In addition, selected users can be given access that includes all Campuses.

Needs analysis

Several different levels of access to Needs Analysis information can be provided for different groups of users, including:

- No Needs Analysis information
- Only Y/N indicators for Gross need and Unmet need
- Actual dollar amounts for Gross need and Unmet need

- Budget, resource, and contribution dollar amounts in addition to need amounts

Satisfactory Academic Progress

Satisfactory Academic Progress information can be restricted to only selected users.