

Create a Student Budget

Path: Financial Aid > Budgets > Create Student Budget

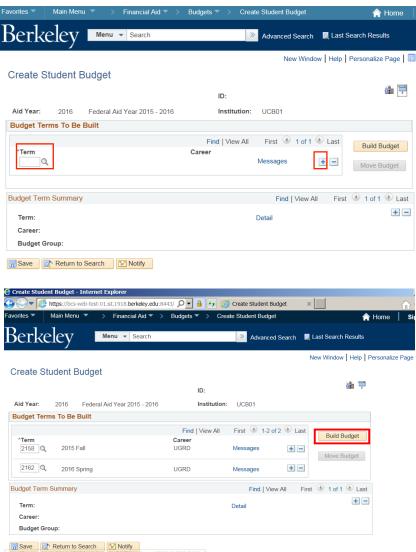
Budgets are usually created in a batch process. However, occasionally if a student does not have one yet, or some data on FA TERM page just changed in a way that impacts Financial Aid, you may need to Build a Budget manually.

Look up the student whose budget needs to be built.

Use the lookup button to select the appropriate Term. If you wish to build a 2nd term at the same time, click the + button to add a new line.

In this example, we will build both Fall and Spring semester at the same time.

Click the Build Budget button.





In the Summary section, the system now displays information for the current semester.

Note: Navigate to the other semester by clicking the Arrow keys or by clicking the View All link to see both semesters included this budget.

In this example, we have clicked View All to see both semesters display.

Click one of the **Detail** links to see the evaluated budget categories and amounts that have been assigned for that semester

Create Student Budget

Aid Year:	2016	Federal Aid Year 2015 - 2016	Institutio	n: UCB01		
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2162 🔍	2016	Spring	UGRD	Messages	+ -	
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Career:	UGRD) Undergraduate				
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Create Student Budget

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🔚 Save 🔯 Return to Search 🖃 Notify

Berkeley

This student is an Undergraduate, so the system evaluated and decided if this student qualified for 11 Budget categories associated with Undergrads.

Each category has rules that determine the amounts that will populate. Not all students will qualify for all categories, and calculations will vary per student's need.

In this example, the student qualified for 9 of the 11 categories. The Item Status shows as "Found" and an amount is shown. The other two categories (Misc & OtherFees) show an Item status of "Warning" and no amount.

Note: Warning does not mean something is wrong, just that no amount was added, which is appropriate. (e.g. a Resident would not have an amount for Non-Resident fee).

After reviewing the assigned Budget Items, click the OK button at the bottom of the page to return to the Create Student Budget page. (If changes are needed, finish moving this budget, then go to **Maintain Student Budgets** to make manual changes).

Back on the Create Student Budget page, notice the **Move Budget** button is now enabled (once the BUILD was initiated).

Click the **Move Budget** button to move the budget items.

Favorites 🔻 Main Menu Financial Aid 🔻 Create Student Budget 合 Hon Budgets -Berkeley Menu 👻 Search Term: 2162 Career: UGRD Student Budget Information Loan Year: Dependency Status: 4th Year Term Detail Housing Status: Study Form: ENRL Marital Status: Academic Plan: Enrollment Detail 04I004U Financial Aid Load: Full-Time Sub-Plan: Family Members: State of Residence: App State Residence: Postal Code: Budget Group: BATCH

Budget Items			Personalize Fir	nd 🖾 📑	1-11 of 1	
Category	Item Code	Description	Amount	Rule	Item Stat	
BOOK Q	B1 Q	Books & Supplies	620.00	Formula	Found	+
CFEE Q	C1 Q	Campus Fees & Class Pass	596.00	Formula	Found	+ •
FOOD Q	N2 Q	Food - Apartment	1,290.00	Formula	Found	+ •
HOUS Q	M2 🔍	Rent&Utility - Apartment	3,592.00	Formula	Found	+ •
MISC Q	Q			Formula	Warning	+
NRES Q	J2 🔍	Non-Resident Fees - UG	12,354.00	Formula	Found	+
OTHF Q	Q			Formula	Warning	+
PERS Q	P2 🔍	Personal - Apartment	1,069.00	Formula	Found	+
SHIP Q	l1 Q	Health Insurance - UG	1,290.00	Formula	Found	+
TRAN Q	O2 Q	Transportation-Apartment	366.00	Formula	Found	+ •
TUIT	A1 Q	UC Systemwide Tuition & Fees	6,120.00	Formula	Found	+ •
OK	Cancel					

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The **Move Budget** button is now greyed out (no longer active) because it has moved the budget items.

You could now go to the Maintain Student Budgets page if you need to make manual changes or move forward to packaging the student's awards.

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Aid Year:	2016	Federal Aid Year 2015 - 2016	Institution:	UCB01		
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udget Term S	ummary			Find View All	First	🕚 1 of 2 🕑 Las
Term:	2162	2016 Spring		Detail		+
Career:	UGRD	Undergraduate				
Budget Grou	p:BATCH	Batch				

If you are finished using Campus Solutions, make sure to sign out and exit your browser as well, at the end of a browser session. Do not leave your open browser unattended.

Support:

For questions or assistance, please contact Campus Shared Services IT:

- ٠ Call **510-664-9000** (press option 1, then option 2 to reach SIS support)
- Email: itcsshelp@berkeley.edu •
- Submit a ticket: https://shared-services-help.berkeley.edu/new_ticket/it •