

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.

The screenshot shows the 'Create Student Budget' page in the Berkeley Student Information Systems. The breadcrumb trail is 'Financial Aid > Budgets > Create Student Budget'. The page title is 'Create Student Budget'. The 'Aid Year' is 2016, and the 'Institution' is UCB01. The 'Budget Terms To Be Built' section contains a table with one row for 'Term' with a search icon. The 'Build Budget' button is highlighted with a red box.

Term	Career	Messages
2158	UGRD	Messages

The screenshot shows the 'Create Student Budget' page in the Berkeley Student Information Systems. The breadcrumb trail is 'Financial Aid > Budgets > Create Student Budget'. The page title is 'Create Student Budget'. The 'Aid Year' is 2016, and the 'Institution' is UCB01. The 'Budget Terms To Be Built' section contains a table with two rows for 'Term' (2158 and 2162). The 'Build Budget' button is highlighted with a red box.

Term	Career	Messages
2158	UGRD	Messages
2162	UGRD	Messages


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

Sarah Student ID: 

Aid Year: 2016 Federal Aid Year 2015 - 2016 Institution: UCB01

Budget Terms To Be Built

Find View All		First	1-2 of 2	Last	
*Term	Career				
2158	UGRD	Messages	+ -		
2162	UGRD	Messages	+ -		


Build Budget Move Budget

Budget Term Summary Find | **View All** First 1 of 2 Last

Term:	2162	2016 Spring	Detail	+ -
Career:	UGRD	Undergraduate		
Budget Group:	BATCH	Batch		

Save Return to Search Notify

Create Student Budget

Sarah Student ID: 

Aid Year: 2016 Federal Aid Year 2015 - 2016 Institution: UCB01

Budget Terms To Be Built

Find View All		First	1-2 of 2	Last	
*Term	Career				
2158	UGRD	Messages	+ -		
2162	UGRD	Messages	+ -		

Build Budget Move Budget

Budget Term Summary Find | View 1 First 1-2 of 2 Last

Term:	2162	2016 Spring	Detail	+ -
Career:	UGRD	Undergraduate		
Budget Group:	BATCH	Batch		
Term:	2158	2015 Fall	Detail	+ -
Career:	UGRD	Undergraduate		
Budget Group:	BATCH	Batch		

Save Return to Search Notify

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.

Navigation: Favorites > Main Menu > Financial Aid > Budgets > Create Student Budget

Search: Menu Search [] Advanced Search [] Last Search Results []

Term: 2162 Career: UGRD

Student Budget Information

Dependency Status:	Loan Year:	4th Year	Term Detail
Housing Status:	Study Form:	ENRL	
Marital Status:	Academic Plan:	04I004U	Enrollment Detail
Financial Aid Load: Full-Time	Sub-Plan:		
Family Members:	State of Residence:		
App State Residence:	Postal Code:		

Budget Group: BATCH

Budget Items

Category	Item Code	Description	Amount	Rule	Item Stat	
BOOK	B1	Books & Supplies	620.00	Formula	Found	[+]
CFEE	C1	Campus Fees & Class Pass	596.00	Formula	Found	[+]
FOOD	N2	Food - Apartment	1,290.00	Formula	Found	[+]
HOUS	M2	Rent&Utility - Apartment	3,592.00	Formula	Found	[+]
MISC				Formula	Warning	[+]
NRES	J2	Non-Resident Fees - UG	12,354.00	Formula	Found	[+]
OTHF				Formula	Warning	[+]
PERS	P2	Personal - Apartment	1,069.00	Formula	Found	[+]
SHIP	I1	Health Insurance - UG	1,290.00	Formula	Found	[+]
TRAN	O2	Transportation-Apartment	366.00	Formula	Found	[+]
TUIT	A1	UC Systemwide Tuition & Fees	6,120.00	Formula	Found	[+]

OK Cancel

Sarah Student ID: []

Aid Year: 2016 Federal Aid Year 2015 - 2016 Institution: UCB01

Budget Terms To Be Built

*Term	Career	Messages	
2158 2015 Fall	UGRD	Messages	[+]
2162 2016 Spring	UGRD	Messages	[+]

Build Budget Move Budget

Budget Term Summary

Term:	2162	2016 Spring	Detail
Career:	UGRD	Undergraduate	
Budget Group:	BATCH	Batch	


Term:	2158	2015 Fall	Detail
Career:	UGRD	Undergraduate	
Budget Group:	BATCH	Batch	

Save Return to Search Notify

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.

Create Student Budget

ID: 

Aid Year: 2016 Federal Aid Year 2015 - 2016 Institution: UC001

Budget Terms To Be Built

*Term	Find	View All	First	1-2 of 2	Last	
2158	2015 Fall	Career	UGRD	Messages	+	-
2162	2016 Spring	UGRD	Messages	+	-	

Budget Term Summary

Term:	2162	2016 Spring	Detail
Career:	UGRD	Undergraduate	
Budget Group:	BATCH	Batch	

Save Return to Search Notify

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:

- 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