Maintain Term Budgets

Path: Financial Aid > Budgets > Maintain Term Budgets

Students are assigned budget items on a term basis. A student must have an active FA Term record in order for a budget to be created. A fixed number of Budget Categories have been defined for each Career, representing the different kinds of Budget items that may be assigned to a student.

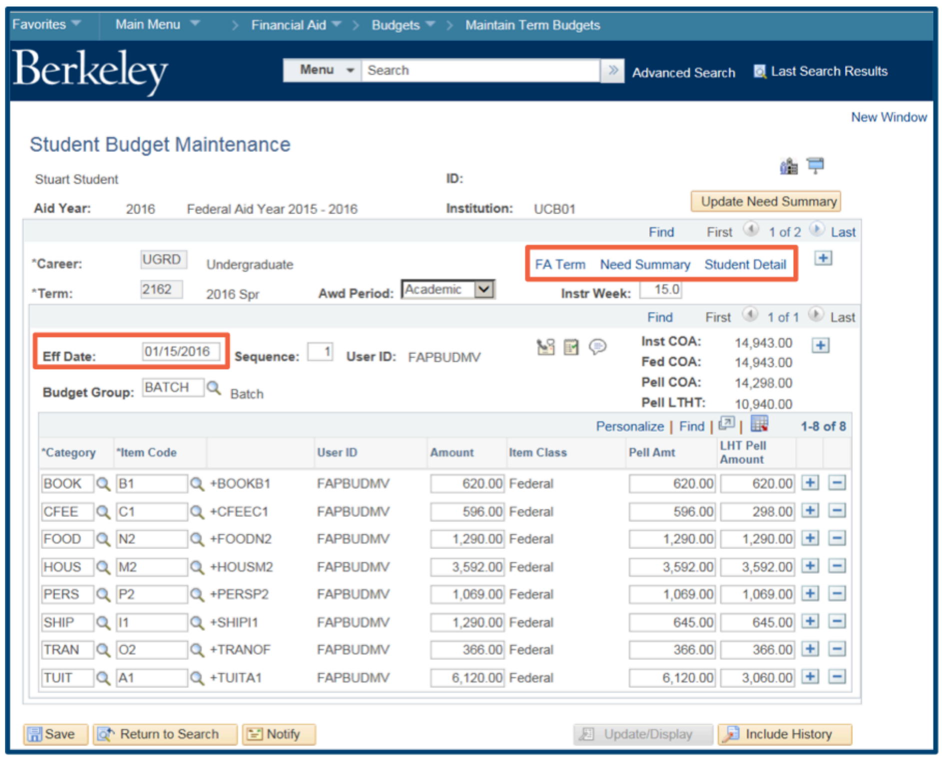
Maintain Term Budgets page shows budget information by semester. Normally, a batch process runs to create a Budget (occasionally, a budget may be manually created via **Create Student Budget** page). This **Maintain Term Budgets** page is where one can review a budget and make edits to a student's budget.

After looking up a student, you will see their budget for the current semester.

Use the arrow keys or First/Last links to toggle between semesters.

In the upper right corner are links to **FA Term**, **Need Summary**, and **Student Detail** that provide useful information related to this student's budget.

The system displays the student's **COA** (Cost of Attendance) and budget as of the **Effective Date** noted. There may be multiple rows for each semester, click the **Include History** button Include History at the bottom of the page, then use the arrow keys to navigate previous budgets for this term.



Budget Details

Category:

Each Budget Category will be classified as an **Evaluated** category or as an **Add-on** category. (Add-on categories begin with the letters AD).

Evaluated categories have a designated set of Budget Formulas. These formulas evaluated a student's information and assign an appropriate budget item and amount. Only one budget item per category will be assigned.

If a student does not meet the criteria for a specific category, then no item or amount will be assigned.

Manual changes should be made using Add-on categories. Add-on categories are not evaluated by budget formulas, so amounts will not be changed by an automated process. (They can be considered "locked").

Note: Do NOT modify Budget items or amounts that have been assigned to Evaluated categories, since the budget formulas will overwrite any manual changes if the student is sent back through a rebudgeting process.

Personalize | Find | | 1-8 of 8

*Category	*Item Code		User ID	Amount	Item Class	Pell Amt	LHT Pell Amount
BOOK	B1	+BOOKB1	FAPBUDMV	620.00	Federal	620.00	620.00
CFEE	C1	+CFEEC1	FAPBUDMV	596.00	Federal	596.00	298.00
FOOD	N2	+FOODN2	FAPBUDMV	1,290.00	Federal	1,290.00	1,290.00
HOUS	M2	+HOUSM2	FAPBUDMV	3,592.00	Federal	3,592.00	3,592.00
PERS	P2	+PERSP2	FAPBUDMV	1,069.00	Federal	1,069.00	1,069.00
SHIP	I1	+SHIPI1	FAPBUDMV	1,290.00	Federal	645.00	645.00
TRAN	O2	+TRANOF	FAPBUDMV	366.00	Federal	366.00	366.00
TUIT	A1	+TUITA1	FAPBUDMV	6,120.00	Federal	6,120.00	3,060.00

Item Code:

Budget Items are denoted by a 2 character alphanumeric code.

> **Undergraduate:** First character will be alpha and second character will be numeric (e.g. A1, B2, etc.).
>
> **Graduate:** Both first and second characters will be alpha. (e.g. AA, BC, etc.)
>
> **Education Abroad Program (EAP):** Students in EAP programs may be Undergraduate or Graduate. The first character will be numeric, and the second character will be alpha (e.g. 1A, 2C, etc.).

In this example, this student is an Undergrad, so the Item codes are Alpha + Number.

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*Category	*Item Code		User ID	Amount	Item Class	Pell Amt	LHT Pell Amount
BOOK	B1	+BOOKB1	FAPBUDMV	620.00	Federal	620.00	620.00
CFEE	C1	+CFEEC1	FAPBUDMV	596.00	Federal	596.00	298.00
FOOD	N2	+FOODN2	FAPBUDMV	1,290.00	Federal	1,290.00	1,290.00
HOUS	M2	+HOUSM2	FAPBUDMV	3,592.00	Federal	3,592.00	3,592.00
PERS	P2	+PERSP2	FAPBUDMV	1,069.00	Federal	1,069.00	1,069.00
SHIP	I1	+SHIPI1	FAPBUDMV	1,290.00	Federal	645.00	645.00
TRAN	O2	+TRANOF	FAPBUDMV	366.00	Federal	366.00	366.00
TUIT	A1	+TUITA1	FAPBUDMV	6,120.00	Federal	6,120.00	3,060.00

Description:

> Description of the Budget Item. For Undergraduate Gift Aid Eligible items, the description will begin with a + sign.

User ID:

> Shows a batch process code and/or UID of the last person to update information.

Amount:

> Amount calculated.

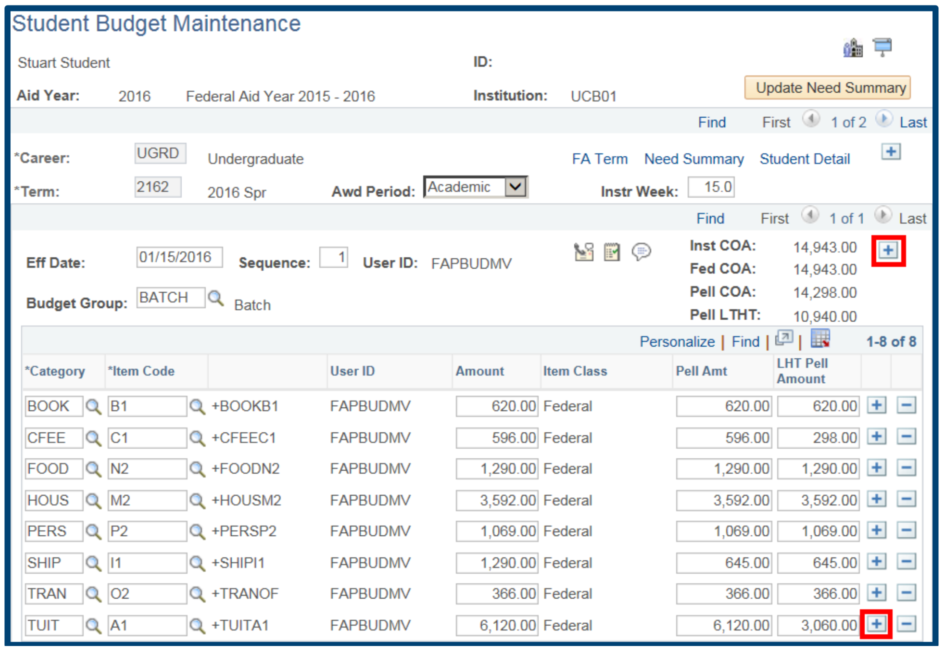
Updating a Budget

Remember that Evaluated Categories are updated through a budget process, so those should not be changed. Additional Categories (starting with "AD") will not get overridden (are "locked"). No rules run against Add-Ons, so the next time an automated process runs it will not delete or change any of these. The only way to change or delete and Add-On is by a manual update.

New data should always be added in chronological order, so ensure you are on the current row (if you were reviewing historical information). You can click the "Last" link to return to the last row that was added.

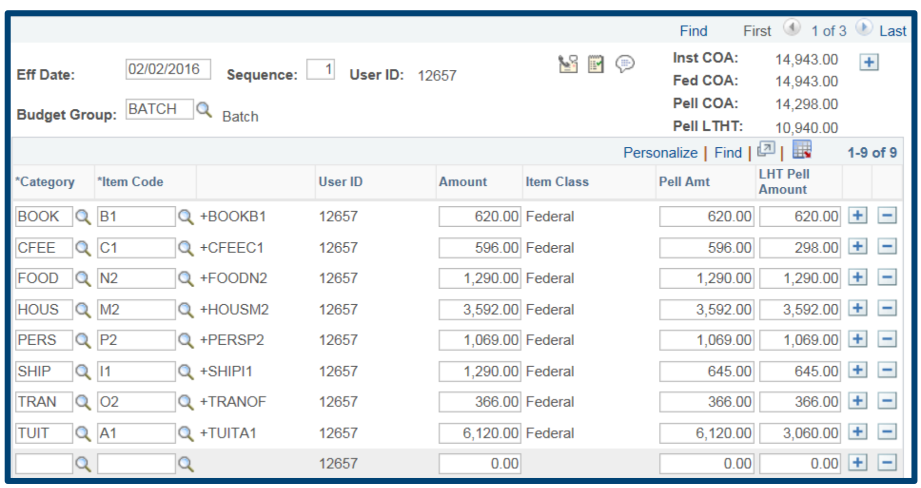
Best practice, when updating information is to click the + button above the budget information to add a new row of data.

Then click the plus button below the existing budget lines, to add a new line.

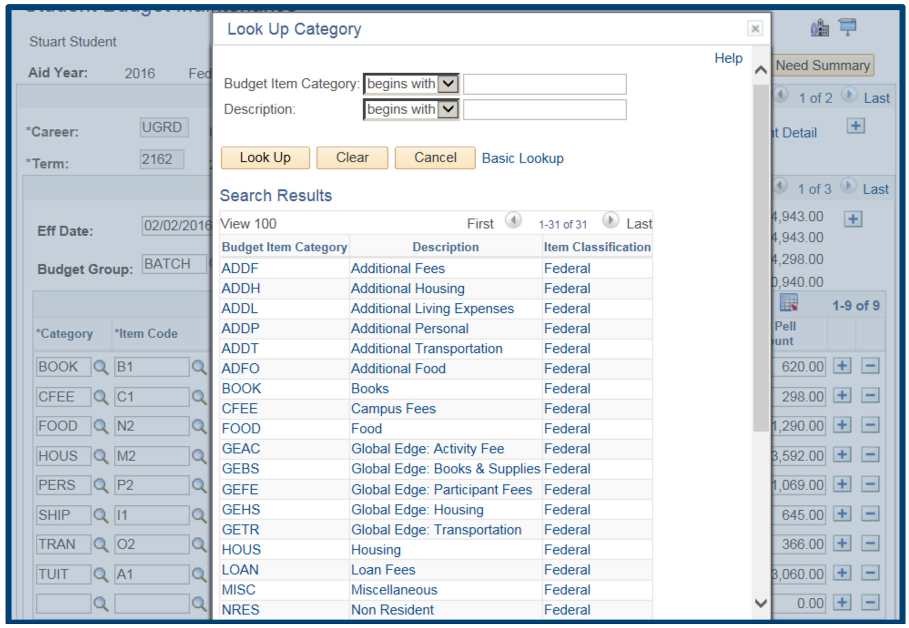


The system has added a new Effective dated row with and changed the UserID.

The system has also added a new blank line in the so that we can add a budget category, item code and amount.

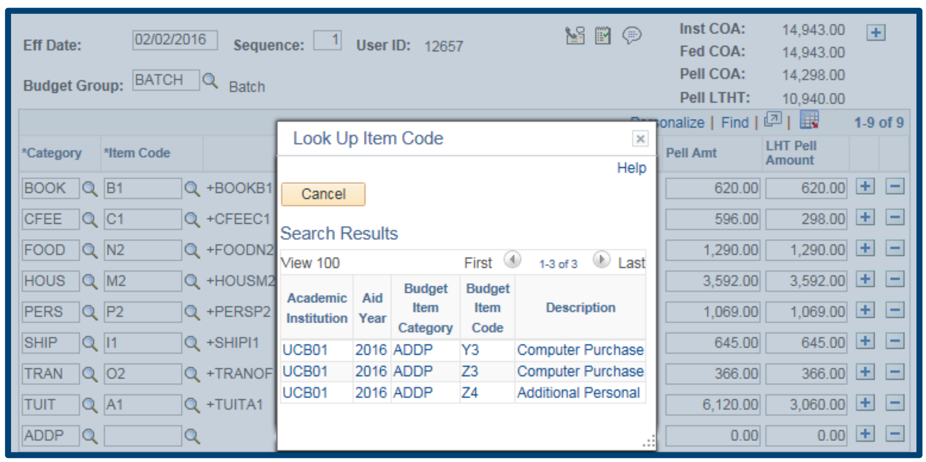


Under the left column, **Category**, click on the magnifying glass in the blank category field to select additional category items to add to the existing budget items. Pick the appropriate category.



For the next column, **Item Code**, use the Lookup icon to pick the appropriate item code.

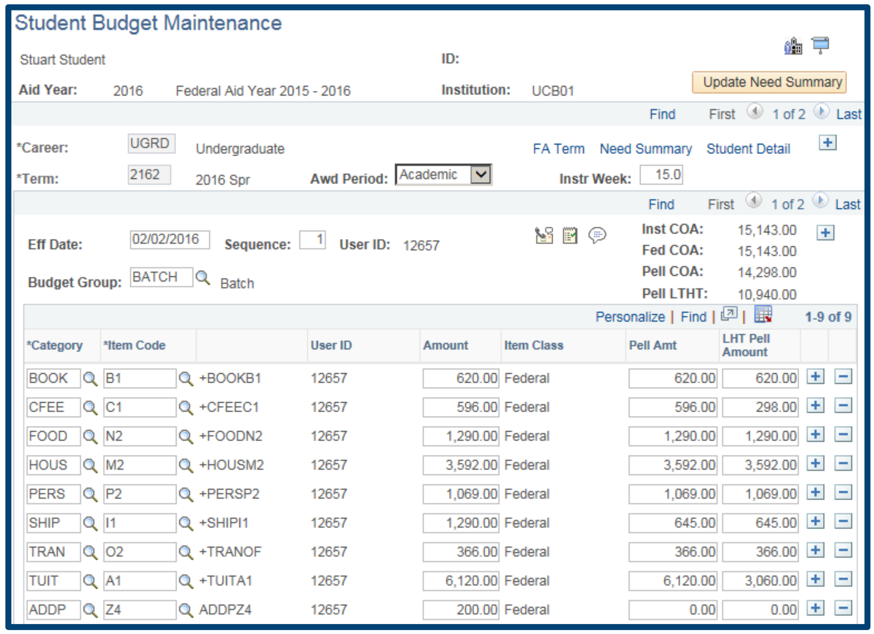
> **Note:** These choices are conditional, meaning they will depend on the previously selected category). Some categories will only have one item code choice and others may have several. Additional Item codes will start with either Y (Gift Aid eligible) or Z (Non-Gift Aid).



Edit the amount, as appropriate.

You may need to update the Pell Amount & LTHT Pell Amount fields as well.

- For graduate and professional students, do not fill in the Pell Amount fields (since they are not eligible for Pell grants).
- For undergraduates fill in the Pell Amount and LTHT Pell Amount fields. Note that personal and miscellaneous expenses are not allowed for LTHT Pell COA and therefore personal and miscellaneous add-ons (which should be rare anyway) should not be added to the LTHT Pell amount field. The Pell Amount and LTHT Pell amounts should be the annual amount for things like tuition and fees, books and supplies, transportation, etc. and should be the actual amount for things like computer or dependent care add-ons.



Student Budget Maintenance

Stuart Student ID:

Aid Year: 2016 Federal Aid Year 2015 - 2016 Institution: UCB01 Update Need Summary

Find First 1 of 2 Last

*Career: UGRD Undergraduate FA Term Need Summary Student Detail

*Term: 2162 2016 Spr Awd Period: Academic Instr Week: 15.0

Find First 1 of 2 Last

Eff Date: 02/02/2016 Sequence: 1 User ID: 12657

Budget Group: BATCH Batch

Inst COA: 15,143.00
Fed COA: 15,143.00
Pell COA: 14,298.00
Pell LTHT: 10,940.00

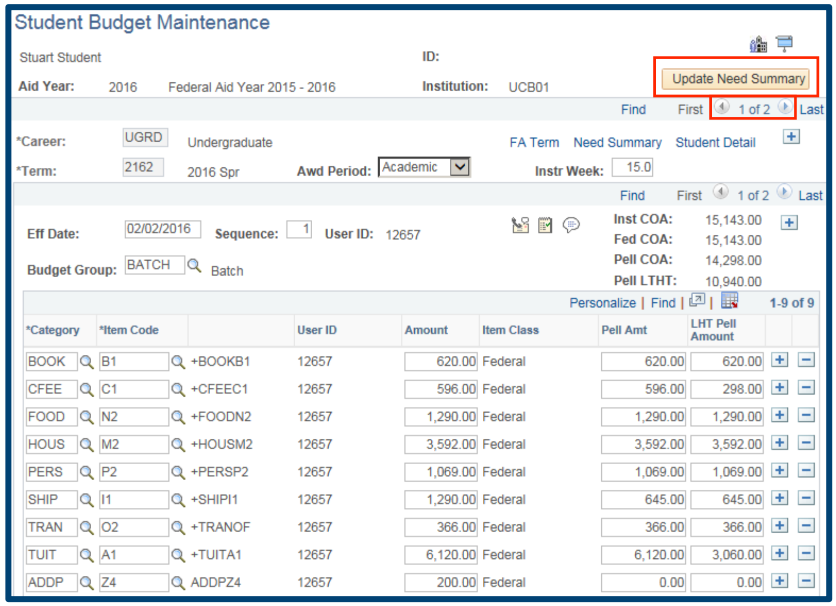
Personalize | Find | 1-9 of 9

*Category	*Item Code		User ID	Amount	Item Class	Pell Amt	LHT Pell Amount
BOOK	B1	+BOOKB1	12657	620.00	Federal	620.00	620.00
CFEE	C1	+CFEEC1	12657	596.00	Federal	596.00	298.00
FOOD	N2	+FOODN2	12657	1,290.00	Federal	1,290.00	1,290.00
HOUS	M2	+HOUSM2	12657	3,592.00	Federal	3,592.00	3,592.00
PERS	P2	+PERSP2	12657	1,069.00	Federal	1,069.00	1,069.00
SHIP	I1	+SHIPI1	12657	1,290.00	Federal	645.00	645.00
TRAN	O2	+TRANOF	12657	366.00	Federal	366.00	366.00
TUIT	A1	+TUITA1	12657	6,120.00	Federal	6,120.00	3,060.00
ADDP	Z4	ADDPZ4	12657	200.00	Federal	0.00	0.00

Add more categories, as needed.

Remember to use the upper arrow keys to toggle to the other semester, and make the appropriate changes to the other semester as well.

When finished, click the **Update Need Summary** button in top right corner. This will save the update.



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TUIT	A1	+TUITA1	12657	6,120.00	Federal	6,120.00	3,060.00
ADDP	Z4	ADDPZ4	12657	200.00	Federal	0.00	0.00

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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**