

Path: Financial Aid > Budgets > Maintain Term Budgets

Berkeley Student Information Systems

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.

Favorites T Main Menu T > F	inancial Aid 🔻 > Budgets	s 🔻 > Maintair	n Term Budgets			
Berkeley	Menu 👻 Search		>	Advanced Sear	rch 🔯 Last S	Search Results
Student Budget Maintena	nce					New Window
Stuart Student		ID:				₽
Aid Year: 2016 Federal Aid	(ear 2015 - 2016	Institution	UCB01	Up	date Need Sur	nmary
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*Career: UGRD Undergra	duate		FA Term Nee	d Summary Stu	udent Detail	+
*Term: 2162 2016 Spr	Awd Period: A	cademic 🗸	Instr Weel	e 15.0		
				Find Fir	rst 🕚 1 of 1	🕑 Last
Eff Date: 01/15/2016 Seq	uence: 1 User ID: F	APBUDMV	🕍 🖬 🗭	Inst COA: Fed COA:	14,943.00 14,943.00	+
Budget Group: BATCH Q Batch	1			Pell COA:	14,298.00	
			Pare	Pell LTHT:	10,940.00	L8 of 8
*Category *Item Code	User ID	Amount	Item Class	Pell Amt	LHT Pell Amount	
BOOK Q B1 Q +BOOKE	FAPBUDMV	620.00	Federal	620.00	620.00	+ -
CFEE Q C1 Q +CFEEC	1 FAPBUDMV	596.00	Federal	596.00	298.00	+ -
FOOD Q N2 Q +FOOD	2 FAPBUDMV	1,290.00	Federal	1,290.00	1,290.00	+ -
HOUS Q M2 Q +HOUS	12 FAPBUDMV	3,592.00	Federal	3,592.00	3,592.00	+ -
PERS Q P2 Q +PERSP	2 FAPBUDMV	1,069.00	Federal	1,069.00	1,069.00	+ -
SHIP Q I1 Q +SHIPI1	FAPBUDMV	1,290.00	Federal	645.00	645.00	+ -
TRAN Q 02 Q +TRANC	F FAPBUDMV	366.00	Federal	366.00	366.00	+ -
	FAPBUDMV	6,120.00	Federal	6,120.00	3,060.00	+ -
Save 💽 Return to Search	Notify		渥 Upd	date/Display	🔎 Include H	story

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 <u>NOT</u> 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.

					Pers	onalize Find	2	1-8	of 8
*Category	*Item Code		User ID	Amount	Item Class	Pell Amt	LHT Pell Amount		
BOOK	Q B1	🔍 +BOOKB1	FAPBUDMV	620.00	Federal	620.00	620.00	+	-
CFEE	Q C1	Q +CFEEC1	FAPBUDMV	596.00	Federal	596.00	298.00	+	
FOOD	Q N2	🔍 +FOODN2	FAPBUDMV	1,290.00	Federal	1,290.00	1,290.00	+	-
HOUS	Q M2	🔍 +HOUSM2	FAPBUDMV	3,592.00	Federal	3,592.00	3,592.00	+	
PERS	Q P2	🔍 +PERSP2	FAPBUDMV	1,069.00	Federal	1,069.00	1,069.00	+	
SHIP	Q 1	🔍 +SHIPI1	FAPBUDMV	1,290.00	Federal	645.00	645.00	+	
TRAN	Q O2	🔍 +TRANOF	FAPBUDMV	366.00	Federal	366.00	366.00	+	
TUIT	Q 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.

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.

					Pers	onalize Find	2 📑	1-8 of	f 8
*Category	*Item Code		User ID	Amount	Item Class	Pell Amt	LHT Pell Amount		
воок 🔍	B1 Q	+BOOKB1	FAPBUDMV	620.00	Federal	620.00	620.00	+	-
CFEE Q	C1 Q	+CFEEC1	FAPBUDMV	596.00	Federal	596.00	298.00	+	-
FOOD Q	N2 Q	+FOODN2	FAPBUDMV	1,290.00	Federal	1,290.00	1,290.00	+	-
HOUS Q	M2 Q	+HOUSM2	FAPBUDMV	3,592.00	Federal	3,592.00	3,592.00	+	-
PERS Q	P2 Q	+PERSP2	FAPBUDMV	1,069.00	Federal	1,069.00	1,069.00	+	-
SHIP	I1 Q	+SHIPI1	FAPBUDMV	1,290.00	Federal	645.00	645.00	+	-
TRAN Q	02 0	+TRANOF	FAPBUDMV	366.00	Federal	366.00	366.00	+	-
	A1 Q	+TUITA1	FAPBUDMV	6,120.00	Federal	6,120.00	3,060.00	+	-

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.

Stuart Student ID: Image: Constraint of the state of the sta	Student E	Budget N	Vaintenance						
Aid Year: 2016 Federal Aid Year 2015 - 2016 Institution: UCB01 Update Need Summary * Career: UGRD Undergraduate FA Term Need Summary Student Detail * * Term: 2162 2016 Spr Awd Period: Academic Instr Week: 15.0 * * Term: 2162 2016 Spr Awd Period: Academic Instr Week: 15.0 * * Eff Date: 01/15/2016 Sequence: 1 User ID: FAPBUDMV Inst COA: 14,943.00 • Budget Group: BATCH Batch Batch Pell COA: 14,298.00 • BOOK B1 +BOOKB1 FAPBUDMV 620.00 Federal 620.00 620.00 • FOOD N2 +FOODN2 FAPBUDMV 596.00 Federal 596.00 298.00 • • FOOD N2 +FOODN2 FAPBUDMV 596.00 Federal 596.00 298.00 • • FOOD N2 +FOODN2 FAPBUDMV 596.00 596.00 298.00 •	Stuart Studer	nt			ID:			<u>í</u>	, <u> </u>
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*Career: UGRD Undergraduate FA Term Need Summary Student Detail *Term: 2162 2016 Spr Awd Period: Academic Instr Week: 15.0 Find First 1 of 1 ◆ Las Eff Date: 01/15/2016 Sequence: 1 User ID: FAPBUDMV Instr Week: 14,943.00 Imstr Uage: Budget Group: BATCH Batch Batch Pell COA: 14,943.00 Imstr Uage: Pell COA: 14,943.00 Imstr Uage: Pell COA: 14,943.00 Imstr Uage: Imstr Uage: 101115/2016 Sequence: 1 User ID: FAPBUDMV Pell COA: 14,943.00 Imstr Uage: Imstr U							Find F	irst 🕚 1 of 2	2 🕑 Last
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SHIP Q 11 Q +SHIP11 FAPBUDMV 1,290.00 Federal 645.00 645.00 • -	PERS Q	P2	Q +PERSP2	FAPBUDMV	1,069.00	Federal	1,069.00	1,069.00	+ -
	SHIP Q	11	🔍 +SHIPI1	FAPBUDMV	1,290.00	Federal	645.00	645.00	+ -
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TUIT 🔍 A1 🔍 +TUITA1 FAPBUDMV 6,120.00 Federal 6,120.00 3,060.00 💽 🖃	TUIT 🔍	A1	🔍 +TUITA1	FAPBUDMV	6,120.00	Federal	6,120.00	3,060.00	+ -

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			Baton				Pell LTHT:	10,940.00		
						Pers	onalize Find	(2) 🔣	1-9	of 9
*Category	*Item Co	ode		User ID	Amount	Item Class	Pell Amt	LHT Pell Amount		
BOOK	3 B1	Q	+BOOKB1	12657	620.00	Federal	620.00	620.00	+	-
CFEE	Q C1	Q	+CFEEC1	12657	596.00	Federal	596.00	298.00	+	-
FOOD	Q N2	Q	+FOODN2	12657	1,290.00	Federal	1,290.00	1,290.00	+	-
HOUS	Q M2	Q	+HOUSM2	12657	3,592.00	Federal	3,592.00	3,592.00	+	-
PERS	Q P2	Q	+PERSP2	12657	1,069.00	Federal	1,069.00	1,069.00	+	-
SHIP	م 11	Q	+SHIPI1	12657	1,290.00	Federal	645.00	645.00	+	-
TRAN	Q 02	Q	+TRANOF	12657	366.00	Federal	366.00	366.00	+	-
TUIT	Q A1	Q	+TUITA1	12657	6,120.00	Federal	6,120.00	3,060.00	+	-
	۹.	Q		12657	0.00		0.00	0.00	+	-

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.

	Stuart Student		Look Up Catego	Ŋ		×	a 7
	Aid Year:	2016 Fed	Budget Item Categor Description:	y: begins with V begins with V		Help	Need Summary
	Career:	UGRD					it Detail 🛨
3	Term:	2162	Look Up Cl	ear Cancel Basic Loo	kup		
			Search Results				🕚 1 of 3 🕑 Last
	Eff Date:	02/02/2016	View 100	First 🕚	1-31 of 31 🕑 Last		4,943.00 🛨
	Ell Date.		Budget Item Category	Description	Item Classification		4,943.00
	Budget Grou	p: BATCH	ADDF	Additional Fees	Federal		4,298.00
			ADDH	Additional Housing	Federal		0,940.00
			ADDL	Additional Living Expenses	Federal		1-9 of 9
	*Category *I	tem Code	ADDP	Additional Personal	Federal		Pell
			ADDT	Additional Transportation	Federal		unt
	BOOK Q E	31 🔍	ADFO	Additional Food	Federal		620.00 + -
	CEEE 0	1	BOOK	Books	Federal		298.00 + -
			CFEE	Campus Fees	Federal		200.00
	FOOD	√2 Q	FOOD	Food	Federal		1,290.00 + -
	HOUS Q	12 Q	GEAC	Global Edge: Activity Fee	Federal		8.592.00 + -
			GEBS	Global Edge: Books & Supplies	Federal		
	PERS Q F	2	GEFE	Global Edge: Participant Fees	Federal		1,069.00 + -
	SHIP Q	1 Q	GEHS	Global Edge: Housing	Federal		645.00 + -
			GETR	Global Edge: Transportation	Federal		
			HOUS	Housing	Federal		300.00
	TUIT 🔍 A	A1 Q	LOAN	Loan Fees	Federal		3,060.00 🛨 💻
			MISC	Miscellaneous	Federal		0.00 + -
		Q	NRES	Non Resident	Federal	*	0.00

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).

Eff Date: 02/02/2016 Sequence: 1 User ID: 12657 M Inst COA: 14,943.00 ∓ Budget Group: BATCH Q Batch Pell COA: 14,943.00 Pell COA: 14,943.00											+
Buuget Of	oup.	> Ba	lch						Pell LTHT:	10,940.00	
					0.1				onalize Find	@ 🔣	1-9 of 9
*Category	*Item Code		Loo	k Up Iter	n Code			Help	Pell Amt	LHT Pell Amount	
BOOK	B1	Q +BOO	KB1 Ca	ncel					620.00	620.00	+ -
CFEE	C1	Q +CFE	EC1 Sear	h Recult	-			- 1	596.00	298.00	+ -
FOOD	N2	Q +F00	DN2 View 1	00	.3	First	1-3 of 3	Last	1,290.00	1,290.00	+ -
HOUS	M2	Q +HOU	SM2	min Aid	Budget	Budget	10010 01		3,592.00	3,592.00	+ -
PERS	P2	Q +PER	SP2 Institu	ition Year	Item Category	Item	Description		1,069.00	1,069.00	+ -
SHIP	. [1	🔍 +SHIF	I1 UCB0	1 2016	ADDP	Y3	Computer Purch	nase	645.00	645.00	+ -
TRAN Q	02	Q +TRA	NOF UCBO	1 2016	ADDP	Z3	Computer Purch	nase	366.00	366.00	+ -
	A1		A1 UCB0	1 2016	ADDP	Z4	Additional Perso	onal	6,120.00	3,060.00	+ -
ADDP Q]Q						.::	0.00	0.00	+ -

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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 B	Budget M	laintenance						_	
Stuart Studer	nt			ID:			ů.	-	
Aid Year:	2016	Federal Aid Year 201	5 - 2016	Institutio	n: UCB01	U	pdate Need Su	mma	ary
						Find F	First 🕚 1 of 2	2 🕑	Last
*Career:	UGRD	Undergraduate			FA Term Nee	d Summary S	tudent Detail	-	F
*Term:	2162	2016 Spr	Awd Period: Aca	ademic 🗸	Instr Week	: 15.0			
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Eff Date:	02/02/2	016 Sequence:	1 User ID: 12	657	皆 🖻 💬	Inst COA:	15,143.00	+	
	DATOU					Pell COA:	15,143.00		
Budget Gro	oup: BATCH	Batch				Pell LTHT:	10,940.00		
					Pers	onalize Find	2	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 Q	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 Q	M2	🔍 +HOUSM2	12657	3,592.00	Federal	3,592.00	3,592.00	+	-
PERS Q	P2	+PERSP2	12657	1,069.00	Federal	1,069.00	1,069.00	+	-
SHIP Q	11	🔍 +SHIPI1	12657	1,290.00	Federal	645.00	645.00	+	-
TRAN Q	02	🔍 +TRANOF	12657	366.00	Federal	366.00	366.00	+	-
TUIT	A1	🔍 +TUITA1	12657	6,120.00	Federal	6,120.00	3,060.00	+	-
ADDP Q	Z4	Q ADDPZ4	12657	200.00	Federal	0.00	0.00	+	-

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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.

Student Budget Maintenance										
Stuart Studen	t			ID:			🏙 쿠			
Aid Year:	2016 Fed	deral Aid Year 2015	5 - 2016	Institutio	n: UCB01	U	pdate Need Si	umma	ary	
						Find F	First 🕚 1 of	2 🕑	Last	
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*Category	*Item Code		User ID	Amount	Item Class	Pell Amt	LHT Pell Amount			
BOOK Q	B1 Q	+BOOKB1	12657	620.00	Federal	620.00	620.00	+	-	
CFEE Q	C1 Q	+CFEEC1	12657	596.00	Federal	596.00	298.00	+	-	
FOOD Q	N2 Q	+FOODN2	12657	1,290.00	Federal	1,290.00	1,290.00	+	-	
HOUS Q	M2 Q	+HOUSM2	12657	3,592.00	Federal	3,592.00	3,592.00	+	-	
PERS Q	P2 Q	+PERSP2	12657	1,069.00	Federal	1,069.00	1,069.00	+	-	
SHIP Q	l1 Q	+SHIPI1	12657	1,290.00	Federal	645.00	645.00	+	-	
TRAN Q	O2 Q	+TRANOF	12657	366.00	Federal	366.00	366.00	+	-	
TUIT Q	A1 Q	+TUITA1	12657	6,120.00	Federal	6,120.00	3,060.00	+	-	
ADDP Q	Z4 🔍	ADDPZ4	12657	200.00	Federal	0.00	0.00	+	-	

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- Email: itcsshelp@berkeley.edu
- Submit a ticket: https://shared-services-help.berkeley.edu/new_ticket/it