

Creating a Budget Online-102907

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| 1. | Navigate: Financial Aid > Budgets > Create Student Budget. |
| 2. | Make sure the correct Institution and Aid Year are entered. Enter the student's ID into the ID field. |
| 3. | Click the Search button. |
| 4. | For the Term field, you can only select terms for which FA Term has been built for this student and aid year. |
| 5. | Select a Term from the list. |
| 6. | Add a row for the second term of the academic year. Click the Add a new row button. |
| 7. | Enter the desired information into the Term field. |
| 8. | After you select the terms to build, to be safe, click Save . Then click the Build Budget button to build the budgets. This runs the budget process which selects budget categories and applies budget formulas, which will result in a cost of attendance for each term selected. |
| 9. | The Budget Term Summary box displays the term, career and budget group used to build the student's budget for each term selected in the Budget Terms To Be Built group box. There is a row for each term. |
| 10. | Click the Detail link for more information. |
| 11. | Click the OK button to return to the Create Student Budget page. |
| 12. | Check Messages to see if there are any conditions that need correction. Click the Messages link. |
| 13. | On the Messages page, click the Detail link for more information. |
| 14. | Click the Return link. |
| 15. | After building the budget and verifying that the data is correct, click the Move Budget button to commit the calculated budget to the student's record. This button is not available unless you have built a budget. |
| 16. | Click the Move Budget button. |
| 17. | Click the Detail links again to verify that the budgets were moved. |
| 18. | Notice that the Item Status for each budget item is now Moved . |
| 19. | End of Procedure. |