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Pell Budget Adjustment

Concept

This process calculates the annual Pell budget for budget categories that count towards the Pell COA. When the budget for a student is recalculated for a single term because only one term has had changes to FA Term, the Pell COA and other Pell values may be incorrect for that term. Run this process to adjust those values. This process should be run prior to Pell origination.

Procedure


Student Budget Maintenance

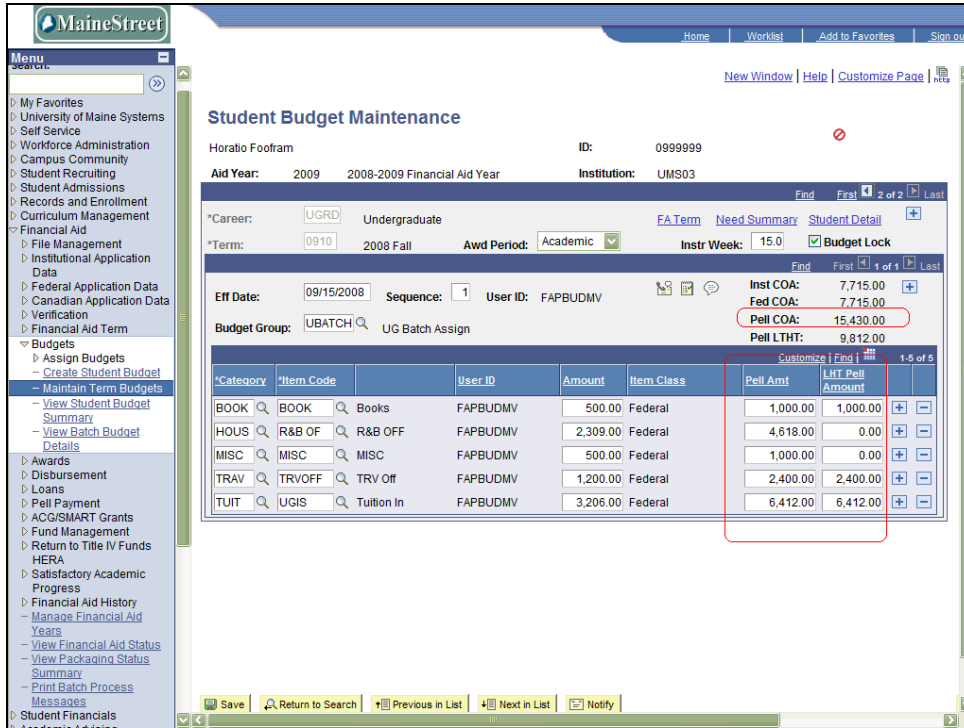
Horatio Footram ID: 0999999
 Aid Year: 2009 2008-2009 Financial Aid Year Institution: UMS03

*Career: UGRD Undergraduate FA Term Need Summary Student Detail
 *Term: 0920 2009 Spr Awd Period: Academic Instr Week: 15.0 Budget Lock

Eff Date: 08/28/2008 Sequence: 1 User ID: FAPBUDMV Inst COA: 7,715.00
 Fed COA: 7,715.00
 Pell COA: 7,715.00
 Budget Group: UBATCH UG Batch Assign Pell LTHT: 4,906.00

*Category	*Item Code	User ID	Amount	Item Class	Pell Amt	LHT Pell Amount
BOOK	BOOK	FAPBUDMV	500.00	Federal	500.00	500.00
HOUS	R&B OF	FAPBUDMV	2,309.00	Federal	2,309.00	0.00
MISC	MISC	FAPBUDMV	500.00	Federal	500.00	0.00
TRAV	TRV OFF	FAPBUDMV	1,200.00	Federal	1,200.00	1,200.00
TUIT	UGIS	FAPBUDMV	3,206.00	Federal	3,206.00	3,206.00

Step	Action
1.	<p>The student in the above example had FA Term rebuilt for fall term only and hence had his budget recalculated for fall only. Note the Pell COA value and the values in the Pell Amt column for spring.</p> <p>Click the Show next row button to view the budget for fall term.</p> 



Student Budget Maintenance

Horatio Footram ID: 0999999
 Aid Year: 2009 2008-2009 Financial Aid Year Institution: UMS03

*Career: UGRD Undergraduate FA Term Need Summary Student Detail
 *Term: 0910 2008 Fall Awd Period: Academic Instr Week: 15.0 Budget Lock

Eff Date: 09/15/2008 Sequence: 1 User ID: FAPBUDMV Inst COA: 7,715.00
 Fed COA: 7,715.00
 Pell COA: 15,430.00
 Pell LTHT: 9,812.00

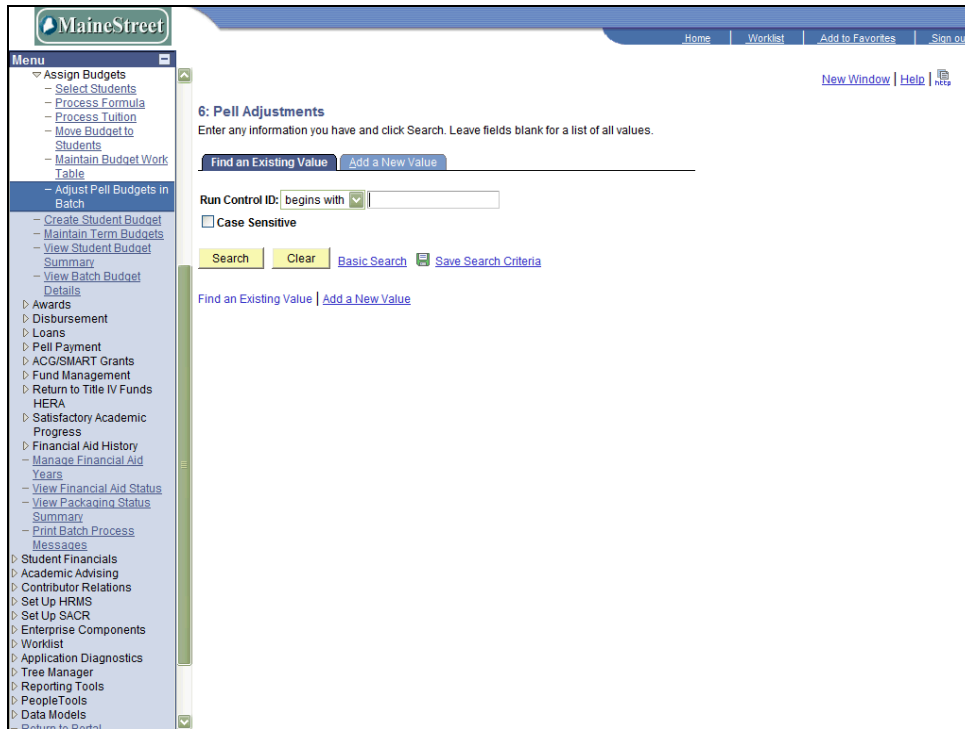
Budget Group: UBATCH UG Batch Assign

*Category	*Item Code	User ID	Amount	Item Class	Pell Amt	LHT Pell Amount
BOOK	BOOK	FAPBUDMV	500.00	Federal	1,000.00	1,000.00
HOUS	R&B OF	FAPBUDMV	2,309.00	Federal	4,618.00	0.00
MISC	MISC	FAPBUDMV	500.00	Federal	1,000.00	0.00
TRAV	TRV OFF	FAPBUDMV	1,200.00	Federal	2,400.00	2,400.00
TUIT	UGIS	FAPBUDMV	3,206.00	Federal	6,412.00	6,412.00

Step	Action
2.	<p>Compare the Pell COA value and the values in the Pell Amt column for fall with the values for spring term. Note that the actual award amounts are OK, but the Pell amounts are for an entire year rather than for one term.</p> <p>To adjust the Pell amounts, navigate to: Financial Aid > Budgets > Assign Budgets > Adjust Pell Budgets in Batch.</p>

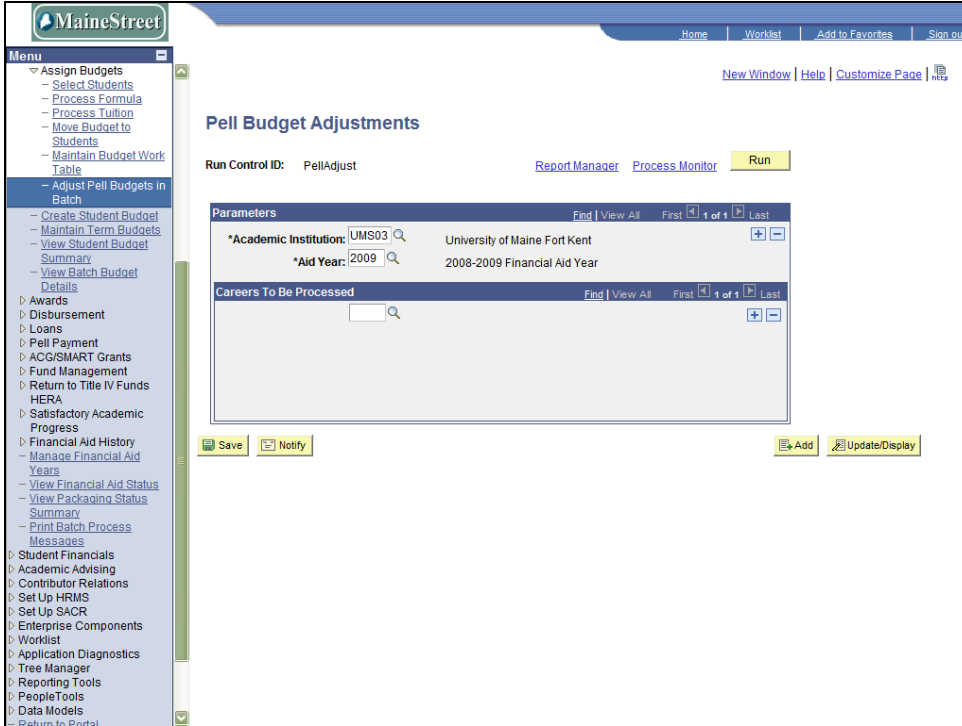
Process Document

Financial Aid: Pell Budget Adjustment-092508



The screenshot shows the 'MaineStreet' web application. On the left is a 'Menu' with various options like 'Assign Budgets', 'Awards', and 'Disbursement'. The main content area is titled '6: Pell Adjustments' and contains a search interface. It includes a text input field for 'Run Control ID: begins with', a 'Case Sensitive' checkbox, and buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. Below the search area are links for 'Find an Existing Value' and 'Add a New Value'.

Step	Action
3.	The process requires a Run Control ID. Either use an existing ID or create a new one.



MaineStreet

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Menu

- Assign Budgets
 - Select Students
 - Process Formula
 - Process Tuition
 - Move Budget to Students
 - Maintain Budget Work Table
 - Adjust Pell Budgets in Batch
 - Create Student Budget
 - Maintain Term Budgets
 - View Student Budget Summary
 - View Batch Budget Details
- Awards
- Disbursement
- Loans
- Pell Payment
- ACG/SMART Grants
- Fund Management
- Return to Title IV Funds
 - HERA
 - Satisfactory Academic Progress
- Financial Aid History
 - Manage Financial Aid Years
 - View Financial Aid Status
 - View Packaging Status Summary
 - Print Batch Process Messages
- Student Financials
- Academic Advising
- Contributor Relations
- Set Up HRMS
- Set Up SACR
- Enterprise Components
- Worklist
- Application Diagnostics
- Tree Manager
- Reporting Tools
- PeopleTools
- Data Models
- Return to Portal

Pell Budget Adjustments

Run Control ID: PellAdjust Report Manager Process Monitor Run

Parameters Find | View All First 1 of 1 Last

*Academic Institution: UMS03 University of Maine Fort Kent

*Aid Year: 2009 2008-2009 Financial Aid Year

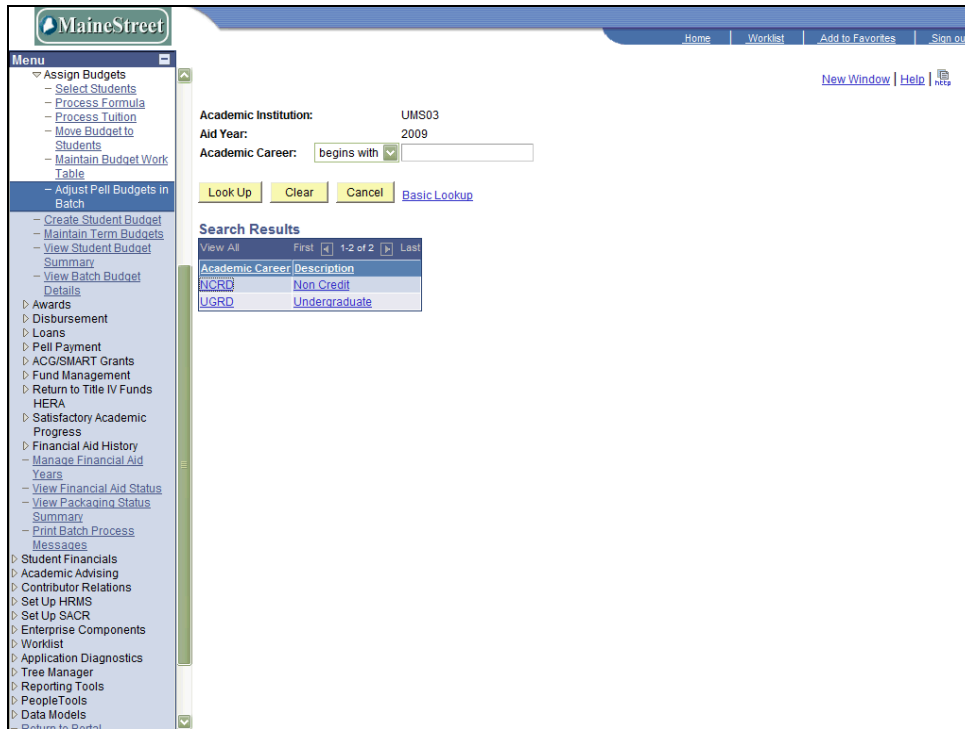
Careers To Be Processed Find | View All First 1 of 1 Last

Save Notify Add Update/Display

Step	Action
4.	Make sure the correct Academic Institution and Aid Year are populated in the fields. Select the Career to be Processed : click the Look up button.

Process Document

Financial Aid: Pell Budget Adjustment-092508



The screenshot shows the MaineStreet web application interface. On the left is a navigation menu with categories like 'Assign Budgets', 'Awards', 'Disbursement', 'Loans', 'Pell Payment', 'ACG/SMART Grants', 'Fund Management', 'Return to Title IV Funds', 'HERA', 'Satisfactory Academic Progress', 'Financial Aid History', 'Manage Financial Aid Years', 'View Financial Aid Status', 'View Packaging Status', 'Summary', 'Print Batch Process Messages', 'Student Financials', 'Academic Advising', 'Contributor Relations', 'Set Up HRMS', 'Set Up SACR', 'Enterprise Components', 'Worklist', 'Application Diagnostics', 'Tree Manager', 'Reporting Tools', 'PeopleTools', and 'Data Models'. The main content area shows search criteria: 'Academic Institution: UMS03', 'Aid Year: 2009', and 'Academic Career: begins with'. Below these are buttons for 'Look Up', 'Clear', 'Cancel', and 'Basic Lookup'. The 'Search Results' section displays a table with two rows: 'NCRD' with description 'Non Credit' and 'UGRD' with description 'Undergraduate'. The 'UGRD' row is highlighted.

Step	Action
5.	<p>The Search Results display all the careers for your Academic Institution. Make a selection.</p> <p><u>UGRD</u> <u>Undergraduate</u></p>

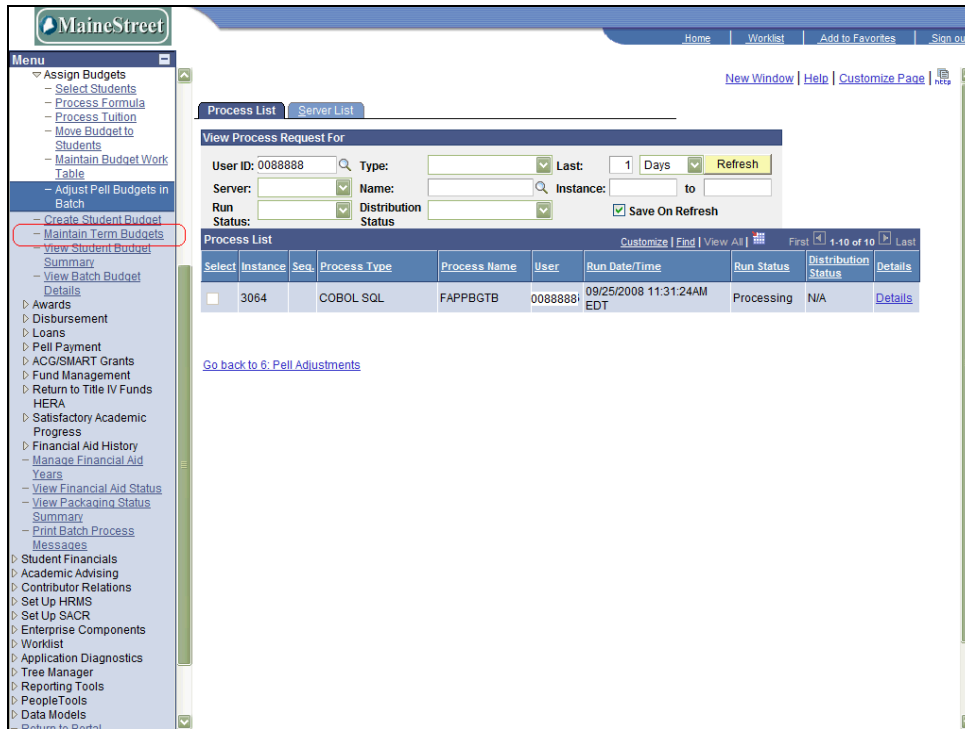


The screenshot shows the 'MaineStreet' web application interface. The title is 'Pell Budget Adjustments'. Below the title, there are links for 'Report Manager', 'Process Monitor', and a 'Run' button. The 'Parameters' section contains two rows: '*Academic Institution: UMS03 University of Maine Fort Kent' and '*Aid Year: 2009 2008-2009 Financial Aid Year'. The 'Careers To Be Processed' section contains one row: 'UGRD Undergraduate'. A red box highlights the '+ Add' button in the 'Careers To Be Processed' section. At the bottom of the page, there are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'.

Step	Action
6.	Note that you can use the Add a Row button in the Careers to be Processed area of the page to select more than one career to process in this run. Click the Run button. Click OK on the next page.
7.	Click the Process Monitor link. Process Monitor
8.	Click the Refresh button from time to time until the Run Status is <i>Success</i> and the Distribution Status is <i>Posted</i> . If desired, click the Details link to view the messages from the process once it is successful. Refresh

Process Document

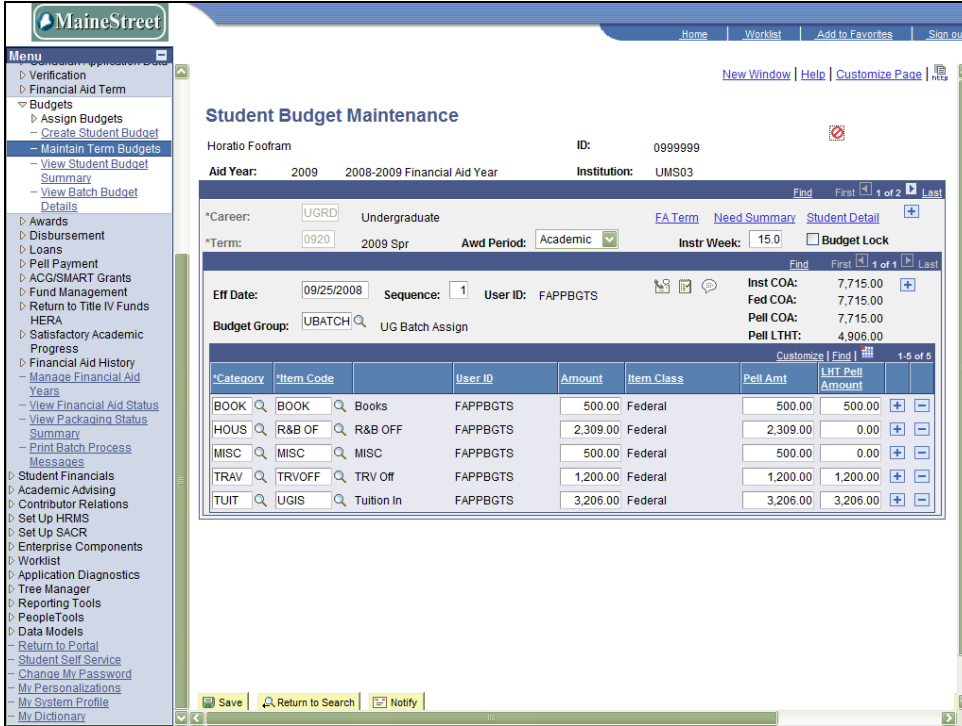
Financial Aid: Pell Budget Adjustment-092508



The screenshot shows the MaineStreet web application interface. On the left is a navigation menu with various options. The 'Maintain Term Budgets' link is highlighted with a red box. The main content area shows a 'Process List' table with the following data:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	3064		COBOL SQL	FAPPBGTB	0088888	09/25/2008 11:31:24AM EDT	Processing	N/A	Details

Step	Action
9.	To see that the correct Pell amounts are now entered in the student's budget page, click the Maintain Term Budgets link once the process is Successful. Maintain Term Budgets




Student Budget Maintenance

Horatio Footram ID: 0999999
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*Career: UGRD Undergraduate FA Term Need Summary Student Detail
 *Term: 0920 2009 Spr Awd Period: Academic Instr Week: 15.0 Budget Lock

Eff Date: 09/25/2008 Sequence: 1 User ID: FAPPBGTS Inst COA: 7,715.00
 Fed COA: 7,715.00
 Pell COA: 7,715.00
 Pell LTHT: 4,906.00

*Category	*Item Code		User ID	Amount	Item Class	Pell Amt	LHT Pell Amount
BOOK	BOOK	Books	FAPPBGTS	500.00	Federal	500.00	500.00
HOUS	R&B OF	R&B OFF	FAPPBGTS	2,309.00	Federal	2,309.00	0.00
MISC	MISC	MISC	FAPPBGTS	500.00	Federal	500.00	0.00
TRAV	TRV OFF	TRV Off	FAPPBGTS	1,200.00	Federal	1,200.00	1,200.00
TUIT	UGIS	Tuition In	FAPPBGTS	3,206.00	Federal	3,206.00	3,206.00

Step	Action
10.	<p>There is no change to the spring budget.</p> <p>Click the Show next row button to view the budget for fall.</p> 

Process Document

Financial Aid: Pell Budget Adjustment-092508



MaineStreet

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Student Budget Maintenance

Horatio Footram ID: 0999999

Aid Year: 2009 2008-2009 Financial Aid Year Institution: UMS03

*Career: UGRD Undergraduate FA Term Need Summary Student Detail

*Term: 0910 2008 Fall Awd Period: Academic Instr Week: 15.0 Budget Lock

Eff Date: 09/25/2008 Sequence: 1 User ID: FAPPBGTS Inst COA: 7,715.00
 Fed COA: 7,715.00
 Pell COA: 7,715.00
 Budget Group: UBATCH UG Batch Assign Pell LTHT: 4,906.00

*Category	*Item Code		User ID	Amount	Item Class	Pell Amt	LHT Pell Amount	
BOOK	BOOK	Books	FAPPBGTS	500.00	Federal	500.00	500.00	+
HOUS	R&B OF	R&B OFF	FAPPBGTS	2,309.00	Federal	2,309.00	0.00	+
MISC	MISC	MISC	FAPPBGTS	500.00	Federal	500.00	0.00	+
TRAV	TRV OFF	TRV Off	FAPPBGTS	1,200.00	Federal	1,200.00	1,200.00	+
TUIT	UGIS	Tuition In	FAPPBGTS	3,206.00	Federal	3,206.00	3,206.00	+

Save | Return to Search | Notify

Step	Action
11.	The Pell COA and values in the Pell Amt columns are now correct for fall term.
12.	End of Procedure.