

Banner Budgeting

- What is it?
 - Banner budgeting constructs and assigns, according to college-defined criteria, the cost of attendance for student aid applicants.

Banner Budgeting

- **What controls the student's budget?**
 - **Aid Period** (Fall & Spring, Spring only, etc.)
 - **Budget Type** (Campus-based, Institutional, Pell)
 - **Budget Group** (In-state living w/ parent, NEBHE not living w/ parent, etc.)
 - **Budget Components** (Tuition, books, etc.)

Banner Budgeting

- A word of caution!
 - (Aid periods x budget types x budget groups) = the number of possible budgets for a year.
 - Thanks to the magic of multiplication, you can end up creating a large number of budgets.
 - The “copy to” function helps here, both within and across aid years.

Banner Budgeting

- **Another word of caution:**
 - Unless you want to create an extremely large number of budget groups, Banner budgeting assumes full-time enrollment status. Keep this in mind when approving loans and work- study.

Banner Budgeting

- Budget set-up comes together on RBRCOMP
 - For an aid year, budget group, budget type, and aid period, you assign the budget components and their amounts.

Banner Budgeting Control Menu

- RTVAPRD defines your aid periods.
 - **Code:** First character is college code.
 - **Description**
 - **Full Year Percent:** Only one can be 100%. Use 99.99% when needed.
 - **EFC Percent:** Can be duplicated.
 - On **RORTPRD**, you specify which terms (from the Student system) belong in each aid period.

Banner Budgeting Control Menu

- **RTVCOMP:** where you create budget components
 - **Component Code:** First character is college code.
 - **Component Description:** Appears on award letter.
 - **Default:** If checked, allows easy inclusion in budgets.
 - **Print Order:** For award letter. Number by 10's.

Banner Budgeting Control Menu

- RTVBTYP defines the types of budgets.
 - Five types are Banner-provided.
 - You don't have to use any more than the campus-based and Pell types.

Banner Budgeting Control Menu

- RTVBGRP defines the kinds of student for whom you want different budgets.
 - Groups must be definable by data in Banner.
 - Possible group characteristics: tuition (in/out-of-state); residence (with/without parent).
 - Have a default budget group (with no components: a "zero" budget) to catch the problems cases.

Banner Budgeting Control Menu

- **RTVBGRP (cont.)**
 - **Group Code:** First character is college code.
 - **Group Description**
 - **Priority** (for batch budget assignment): Lower number is higher priority. Number by 10's.

Banner Budgeting Control Menu

- RBI BGRP: Inquiry for budget groups
 - Rules exist? (for group assignment)
 - Student count
 - Query capability

Banner Budgeting Control Menu

- RBRGTYP (Budget Group/Type Rules Form)
 - Use this form to associate budget types (campus-based, Pell, etc.) with budget groups (e.g., in-state not w/ parent).
 - Only one type can be the default for a group.
 - Pell must have "A" as the default code.

Banner Budgeting Control Menu

- **RORRULE** (Selection Rules Form)
 - Use this form to create the rules which will place students in budget groups.
 - Use under adult supervision only!
 - Banner team will assist in implementation.

Banner Budgeting Control Menu

- RBRCOMP pulls it all together.
 - For an aid year, budget group, budget type, and aid period, you assign the budget components and their amounts.
 - On first (full-year) budget, use Record/Insert to pull in the components defined as defaults on RTVCOMP.
 - After creating the full-year budget, use "Default Prorated Amounts" to save manual work in creating budgets for other aid periods (for same type and group).

Banner Budgeting

- RBAABUD (Applicant Budget Form)
 - Shows the budget selected by the group assignment process when the financial aid record was created.
 - You can manually change the aid period, add components, and change component amounts. These changes will not be removed by subsequent group assignment runs.

Banner Budgeting

- RBAABUD (cont.)
 - Mixed Enrollment block enables you to put the student in different budget groups for individual terms within the aid period. (Example: for fall, out-of-state with parent; for spring, in-state with parent.)
 - If using mixed enrollment, click "Group Assign" button to have budget recalculated. (On RBAABUD, Sys/Man will show X after mixed-enrollment calculation.)

Code	Description	Full Year Percent	EFC Percent	Activity Date
JFALL	FALL ONLY	50	50	08-JUN-1999
JFASP	FALL & SPRING	100	100	08-JUN-1999
JFASUM	FALL & SUMMER	99.99	100	08-JUN-1999
JFSPSU	FALL, SPRING, SUMMER	150	100	08-JUN-1999
JSPR	SPRING ONLY	50	50	08-JUN-1999
JSPRSU	SPRING & SUMMER	99.99	100	08-JUN-1999
JSUMMR	SUMMER ONLY	50	50	08-JUN-1999

Select

Rollback

Save

Exit

Component Code	Component Description	Default	Print Order	Activity Date
JTUF	Tuition & Fees	<input checked="" type="checkbox"/>	10	15-JUN-1999
JOFE	Other Fees	<input type="checkbox"/>	15	15-JUN-1999
JBKS	Books & Supplies	<input checked="" type="checkbox"/>	20	15-JUN-1999
JDEN	Dental Program Extra Costs	<input type="checkbox"/>	22	15-JUN-1999
JGRA	Graphic Design Extra Costs	<input type="checkbox"/>	24	15-JUN-1999
JTRA	Transportation	<input checked="" type="checkbox"/>	30	15-JUN-1999
JLIV	Student's Basic Living Costs	<input checked="" type="checkbox"/>	40	15-JUN-1999
JMED	Student's Health Care	<input checked="" type="checkbox"/>	50	15-JUN-1999
JMIS	Misc. Personal Expenses	<input checked="" type="checkbox"/>	60	15-JUN-1999
JKID	Child Care	<input type="checkbox"/>	70	15-JUN-1999
JLOF	Stafford Loan Fees	<input type="checkbox"/>	80	15-JUN-1999
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		

Select

Rollback

Save

Exit

Type		Default	Pell		State	Activity	
Code	Description	EFC	Camp	Inst	Other	Date	
CAMP	Campus based	F	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
INST	Institutional	I	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
NOFE	Institutional (non-federal)	F	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	24-NOV-1998
OTHR	Other	I	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	03-JAN-1995
PELL	Pell Based	F	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
STAT	State	F	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	03-JAN-1995
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
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Group Code	Group Description	Priority	Activity Date
JRENWP	In-State, Not With Parent	10	08-JUN-1999
JREWP	In-State, Living With Parent	20	08-JUN-1999
JOSNWP	Non-Resident, Not With Parent	30	08-JUN-1999
JOSWP	Non-Resident, With Parent	40	08-JUN-1999
JNENWP	NEBHE, Not With Parent	50	08-JUN-1999
JNEWP	NEBHE, Living With Parent	60	08-JUN-1999
JDEFLT	Default	99	08-JUN-1999

Rollback

Save

Exit



Aid Year:

Group Code	Description	Priority	Rules Exist	Student Count	Activity Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Total:

Student Count

Query:

Rollback

Exit

Group Code:

Type	Description	Default	Activity Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Rollback

Save

Exit

Rule Type:	<input type="text"/>	<input type="text"/>
Aid Year:	<input type="text"/>	<input type="text"/>
Group Code:	<input type="text"/>	<input type="text"/>
Fund Code:	<input type="text"/>	<input type="text"/>

Selection Criteria

'('	Table Name	Column Name	Operator	Value)'	AND/ OR
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Aid Year:	<input type="text"/>	<input type="text"/>
Group Code:	<input type="text"/>	<input type="text"/>
Type Code:	<input type="text"/>	<input type="text"/>
Period Code:	<input type="text"/>	<input type="text"/>

Percent of Full Year

Default Prorated Amts

Budget Component

Component		Adjustment		Activity	
Code	Description	Amount	Percent	Amount	Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Total:		<input type="text"/>			

Copy To

Aid Year:	<input type="text"/>	Group:	<input type="text"/>	Type:	<input type="text"/>	Period:	<input type="text"/>
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Aid Year: SSN: ID:

Budget Group/Period

Group: Percent of Full Year:
 Period:

Budget Type

Type: EFC Method: System/Manual:

Budget Components

Code	Description	Amount	Act. Date	User Id	Sys/Man
JBKS	Books & Supplies	800	14-DEC-1999	J_FATEST	X
JDEN	Dental Program Extra Costs	2,600	23-NOV-1999	J_FATEST	M
JLIV	Student's Basic Living Costs	9,000	23-NOV-1999	J_FATEST	M
JMED	Student's Health Care	700	14-DEC-1999	J_FATEST	X
JMIS	Misc. Personal Expenses	650	14-DEC-1999	J_FATEST	X
Total:		18,976			