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## Banner Financial Aid

Budgeting

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## Introductions

- Name
- Organization
- Title/function
- Job responsibilities
- Banner experience
- Expectations

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## Course Goals

The goal of this workbook is to provide you with the knowledge and practice to accurately calculate and assign cost of attendance values to applicants based on budget types using the various facilities in the Banner Budgeting module workbook objectives or goals

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## Agenda

- Overview
- Set up
- Day-to-Day
- Question and Answer



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## Overview

- How to use the Budgeting module and all of its features such as
  - Budget Component Assignment
  - Mixed Enrollment
  - Multiple Budgets
  - Transaction Log



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## Overview, Continued

- Explain the day-to-day or operational procedures to handle applicant budgeting at your institution



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## Set up Objectives

At the end of this section, you will be able to

- create budget components, component amounts, budget groups, and budget types
- define aid periods
- establish valid budget types by budget groups
- establish valid budget components by budget groups, budget type, and aid period combinations
- define budget group assignment rules for each budget group established



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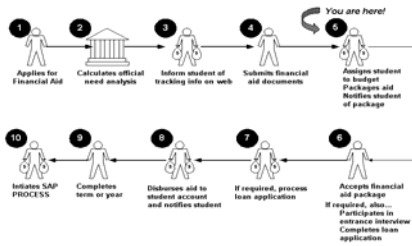
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## Set up Process



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## Set up Review

- How do you create budget components, component amounts, budget groups, and budget types?
- How do you establish valid budget types by budget groups?
- What are aid periods?



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## Day-to-Day Objectives

At the end of this section, you will be able to

- place a student in a budget group
- change a student's budget group to reflect mixed enrollment
- determine whether components were system generated, manually assigned, or generated as a result of mixed enrollment



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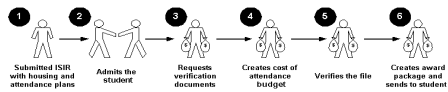
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## Day-to-Day Process



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## Day-to-Day Review

- How do you place a student in a budget group?
- How can you change a student's budget group to reflect mixed enrollment?



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## Course Summary/Review

As a result of this course we have,

- learned how to use the Budgeting module and all of the features
- explained the day-to-day or operational procedures to handle applicant budgeting at your institution



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## Questions and Answers

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Thank you for your participation

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