



LINK FINANCIAL AID
APPLICANT BUDGETING MODULE



FABU-101 Assign a Student to a Budget Group

Date Issued:
3/31/2006

General Description:

This procedure explains how to assign a Student to a Budget Group through Immediate Process.

Responsible Manager: Director of Financial Aid

Related Forms:

ROAIMMP Applicant Immediate Process Form

ROAIDEN Person Name Search Form

Related Procedures:


UNM-100 Search Three Times

The procedure begins on the next page.


PROCEDURE

1. From the direct access field of the main menu, type ROAIMMP and press ENTER. Do NOT click on the magnifying glass.
2. **ID:** Type the student’s Banner ID number.


Process Description	Action Indicator	Term	Current Status	Completion Date
Automatic Group Assignment	Tracking:	(None)		
	Budgeting:	(None)		
	Packaging:	(None)		
	SAP: <input type="checkbox"/> Calc From:			
	Effective:			
Packaging Fund Assignment:	(None)			
Need Analysis Calculation:	(None)			
Immediate Pell Calculation:	<input type="checkbox"/>			
Disbursement Date Update:	<input type="checkbox"/>			
Authorize/Disburse Available Aid:	<input type="checkbox"/>			

3. Correct student displayed?
 - a. If yes, continue.
 - b. If not, go to ROAIDEN and search for the correct student. Reference UNM-100 or General Person search tools.)
4. When correct student is found, highlight the record and press “Select” to return to ROAIMMP with the correct student record.
5. Select “Next Block.” 
6. **Automatic Group Assignment Budgeting:** Click the ▼ button next to the Budgeting field
7. **Budgeting:** Click in the field, select “I” for “immediate.”
8. Press ENTER and see the current term default in the next field **NOTE:** To select a different term, type the appropriate term code OR click in the **Term** field to select.

Applicant Immediate Process Form ROAIMMP 6.2 (INTG)

Aid Year: ID: 

Process Description	Action Indicator	Term	Current Status	Completion Date
Automatic Group Assignment	Tracking:	<input type="text" value="(None)"/>	<input type="text"/>	<input type="text"/>
	Budgeting:	<input type="text" value="=Immediate"/>	<input type="text" value="200686"/>	<input type="text"/>
	Packaging:	<input type="text" value="(None)"/>	<input type="text"/>	<input type="text"/>
	SAP: <input type="checkbox"/> Calc From:	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Effective:	<input type="text"/>		
Packaging Fund Assignment:	<input type="text" value="(None)"/>		<input type="text"/>	<input type="text" value="24-MAR-2006"/>
Need Analysis Calculation:	<input type="text" value="(None)"/>		<input type="text"/>	<input type="text"/>
Immediate Pell Calculation:	<input type="checkbox"/>			
Disbursement Date Update:	<input type="checkbox"/>			
Authorize/Disburse Available Aid:	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="30-MAR-2006"/>

9. Select "Save." 

10. More assignments to process?

- a. If yes, return to step 1.
- b. If not, select "Exit."

*** END ***