

# Building a Budget

**Purpose:** Use this document as a reference for how to build a budget in ctcLink.

**Audience:** FA Counselor/Technician.

 You must have at least one of these local college managed security roles:


- ZD FA Budgets
- ZD FA Director
- ZZ FA Budgets

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.


## Building a Budget

**Navigation:** Financial Aid > Budgets > Create Student Budget

1. From the **Create Student Budget** search page, enter the **ID**, **Academic Institution** and **Aid Year** and select **Search**. The **Create Student Budget** page will display.
2. Insert a new **Term** row under **Budget Terms** by selecting the [+] button.
3. Use the Lookup Tool next to the **Term** field to select the desired term.

 If no terms are available from which to select in the Lookup Tool, this means the FA Term has not been built for that term.

4. Once the terms are defined, select the **Build Budget** button.
5. Select the **Detail** link to view the budget information that has been assigned to the terms.
  - You can add individual budget items here, i.e., MISC budget amount (as demonstrated in the video below).

 You can add any other items in the individual budget item rows in the Detail area. Note, that they may not stick when enrollment-based budget changes are made.

If you want to make permanent budget item additions, make them in the Maintain Student Budget page, i.e., Computer allowance, Loan Fees

6. The Detail link will give a breakdown of the budget term amounts built. Select **OK** to proceed.
7. Select the **Move Budget** button to assign this budget to the student's record.
8. The **Move Budget** button will gray out once the process is complete.
9. Process complete.

## Video Tutorial

The video below demonstrates the process actions described in steps listed above. There is no audio included with this video. Select the play button to start the video.

## Video Tutorial Via Panopto

View the external link to [Building a Budget](#). This link will open in a new tab/window.