Removing a Budget

Purpose: Use this document as a reference for removing 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.

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Navigation: Financial Aid > Budgets > Maintain Term Budgets

1. The Maintain Term Budgets page displays.
2. Enter the Student **ID**
3. Enter the **Academic Institution**
4. Enter the **Aid Year**
5. Select **Search.** The **Student Budget Maintenance** page will display.
6. Navigate to the **Term** associated with the Budget(s) to be removed by using the arrows on the Student Budget Summary Heading.
7. Once the Term is located select the **(+)** button in the Budget Group section to add a new row.
8. A new row is inserted and you can begin removing budget items.
9. Locate the budget to be removed from the **Budget Item** section and select the **(-)** to delete the budget row.
10. A Delete Confirmation message displays.
11. Select **OK** to confirm and continue.
12. Repeat this process for each budget item to be removed.
13. Select **Save** to save your work.
14. Process complete.

> ⓘ Recall that when the ISIR JobSet runs, and the Budget Jobset runs, the removal of your budget may not hold because the student's enrollment may change. Depending on when you make the adjustment (before or after Census lock), enrollment-based budgeting may insert a new row the next day after you have removed a budget. You may only need to remove a budget temporarily to make adjustments to aid, or to calculate a COA. Please be aware you need to check your budget changes after the nightly ISIR JobSet runs to confirm accuracy.

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 Removing a Budget. This link will open in a new tab/window.