Profile Tuition Programs

This job aid lists the steps required to profile tuition programs in NUPlans Forecasting in preparation for your first forecast.

Revenue Received Centrally

Scenarios supported by this job aid are:

- All revenue is received centrally and a percentage is distributed to your school/unit
- All revenue is received centrally with no sharing to school/unit

In order to complete the steps outlined below, forecasters need the central chart string to which revenue forecasts should flow and the specifics of the revenue sharing agreements between the central budget and the school or unit. Contact your Budget Analyst for this information.

Navigate to the Update Tuition Program Profiles form.

From the NUPlans Forecasting Application Menu, click Tuition Forecasting > Update Tuition Program Profiles. Refer to the visual aid Update Tuition Program Profiles to see the form described below.

- Enter data in the left column, Change Program Information.
- Click Reset to erase all data entered in the left column.
- Click Recalculate at any time to save and calculate percentages.

Step 1: Select the budget grouping, timeframe, and program, if not already displayed.

1. Select the budget grouping. Look for the child budget grouping with a blue icon ( ).
2. Confirm the current period.
3. Confirm the year.
4. Select the program.
5. Skip this step.

Step 2: Identify the recipient of tuition revenue (Central).

6. Select Central.
7. Enter comments to explain the profile.
8. Skip this step.

Step 3: Enter an adjustment, if applicable.

9. In the Base Adjustment field, enter an amount to be excluded from distribution, if applicable.
10. Optionally, select a chart string for the adjustment.
11. Review Account messages.
12. Review Base Adjustment Chart String Status messages.

Step 4: Describe the school distribution. (Leave blank if not applicable.)

13. Enter the percentage given to the school.
14. Select the school chart string.
15. Confirm the account code defaults to 88514.
16. Review School Chart String Status messages.
17. Review School Redistribution messages.
**Step 5: Specify the central chart string and account.**

18. Conditional: If you entered a percentage for the school, this field is calculated automatically. If not, you may enter a percentage retained by the Central Office. NUPlans forces the two fields in steps 13 and 18 to 100.

19. Select the central chart string. (Note: base chart strings often align with degree programs.)

20. Select the central account code. (Note: account codes may align with quarters and semesters.)

21. Review Central Chart String Status messages.

22. Review Central Redistribution details messages.

**Step 6: Additional Distribution**

Note: additional distributions to third parties are not supported with centrally-received revenue. If other parties exist, they create programs to represent their share.

23. Not Applicable.


**Step 7: Save your work and complete the program.**

25. Click Update Program.

- The profile you entered in the left column now occupies the right column. It is the current record.
- Profiles are available for forecasting in the *Tuition Input* view and effective immediately.

**About Messages**

In steps 11, 12, 16, 17, 21, and 22, NUPlans asks you to review messages about the chart strings and accounts you selected.

- A green message “Active” means that the chart string and account exist.
- A red message “Data not flowing” advises you to add the account to your budget grouping. Use the form *Add Account to String* form in the Administrative folder. After you do so, return to the profile form and click Recalculate to see the message turn from red to green.

**About Profile Logic**

When you specify that tuition is received centrally, the following logic is applied to the profile:

- You can enter values in the % to School in the School Distribution fields. If so, the % to Central field is calculated automatically, and the two fields are forced to 100. You cannot enter a % to Other in the Additional Distribution section of the page.

- If you select a School Chart String, the school account code defaults to 88514.

- If you select a Central Chart String, you can select a non-transfer tuition account code from the Central Account drop-down menu.

- A chart string appears in the Central Redistribution field to handle the amount being redistributed/transferred to the school chart string.

- Within *Tuition Input*, 100% of the Net Revenue appears on the central chart string, because all tuition is initially received there.