Profile Tuition Programs

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

**Revenue is received by another entity**

Scenarios supported by this job aid are:

- Revenue is received by another entity and shared with your school
- Revenue is received by another entity and shared with your school and central
- Revenue is received by another entity and shared with your school, central, and others

In order to complete the procedure outlined below, forecasters need the chart strings (school and/or central budget) to which revenue forecasts should flow and the specifics of the revenue sharing agreement with the other entity who receives the revenue.

**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 (Other).**

6. Select *Other*.
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 distribution to your school.**

13. Enter the percentage shared with your school.
14. Select the school chart string.
15. Select the school account code.
16. Review School Chart String Status messages.
17. School Redistribution is not applicable messages.
**Step 5: Describe the distribution to central, if applicable.**

18. Enter the percentage given to central.
19. Select the central chart string. (Note: base chart strings often align with degree programs.)
20. Select the central account code. (Note: accounts align with quarters and semesters.)
21. Review Central Chart String Status messages.
22. Central Redistribution is not applicable messages.

**Step 6: Enter the additional distribution to the other entity/ies, if applicable**

23. Enter the percentage given to the other entity/ies. (No chart strings are allowed.)
24. Skip this step.

**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**

If you choose that tuition is received in some way other than centrally or by the school, then the following logic is applied to the profile:

- You can enter a % to School, % to Central, and/or % to Other. The Remainder % is automatically calculated, and the total of all four percentages is 100.
- If you select School Chart String or Central Chart String, you can select any tuition account code (transfer or non-transfer).
- No redistribution chart strings are created and displayed on the page.