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 your school and shared with other entities

Scenarios supported by this job aid are:

- Revenue is received by the school/unit and split with a central chart string
- Revenue is received by the school/unit and split with other entity/ies
- Revenue is received by the school/unit and split with a central chart string and other entity/ies

In order to complete the procedure outlined below, forecasters need the specifics of revenue sharing agreements with the central budget and/or other entities. Additionally, you need the school and central chart strings to which revenue should flow. You do not need the chart strings of other entities.

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 (School/Unit).

6. Select School/Unit.
7. Enter comments to identify and further explain the profile.
8. Skip this step.

Step 3: Enter an adjustment, if applicable.

9. The Base Adjustment field, enter an amount to be excluded from distribution.
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 retained by your school.
14. Select the school chart string.
15. Select the school account code.
16. Review School Chart String Status messages.
17. Review school redistribution details messages.
Step 5: Describe the distribution to central, if applicable.
18. Enter the percentage given to central.
19. Select the central chart string.
20. Not applicable. The central account defaults to 88514.
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.
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
When you indicate that revenue is received by the school, the following logic is applied to the profile:

- You can enter values in the % to School, % to Central, and/or % to Other fields. The Remainder % is automatically calculated so that the total of all four percentages is 100.
- If you select a Central Chart String, the central account code automatically defaults to 88514.
- If you select a School Chart String, you can select a non-transfer tuition account code from the School Account drop-down menu.
- A School Redistribution chart string appears to handle transfer amounts, if any, and you see the sum of percentages being redistributed/transferred elsewhere.
- Within Tuition Input, 100% of the Net Revenue appears on the school chart string, because all tuition is initially received there.