
Managing a Student's Cost of Attendance (COA)

2 hours



TRAINING AGENDA



Overview & Learning Objectives



View or Adjust a Student's Cost of Attendance



Understand How a Student Will Submit a Budget Increase Form



View, Approve, or Deny a Budget Increase Form



End of Course Quiz

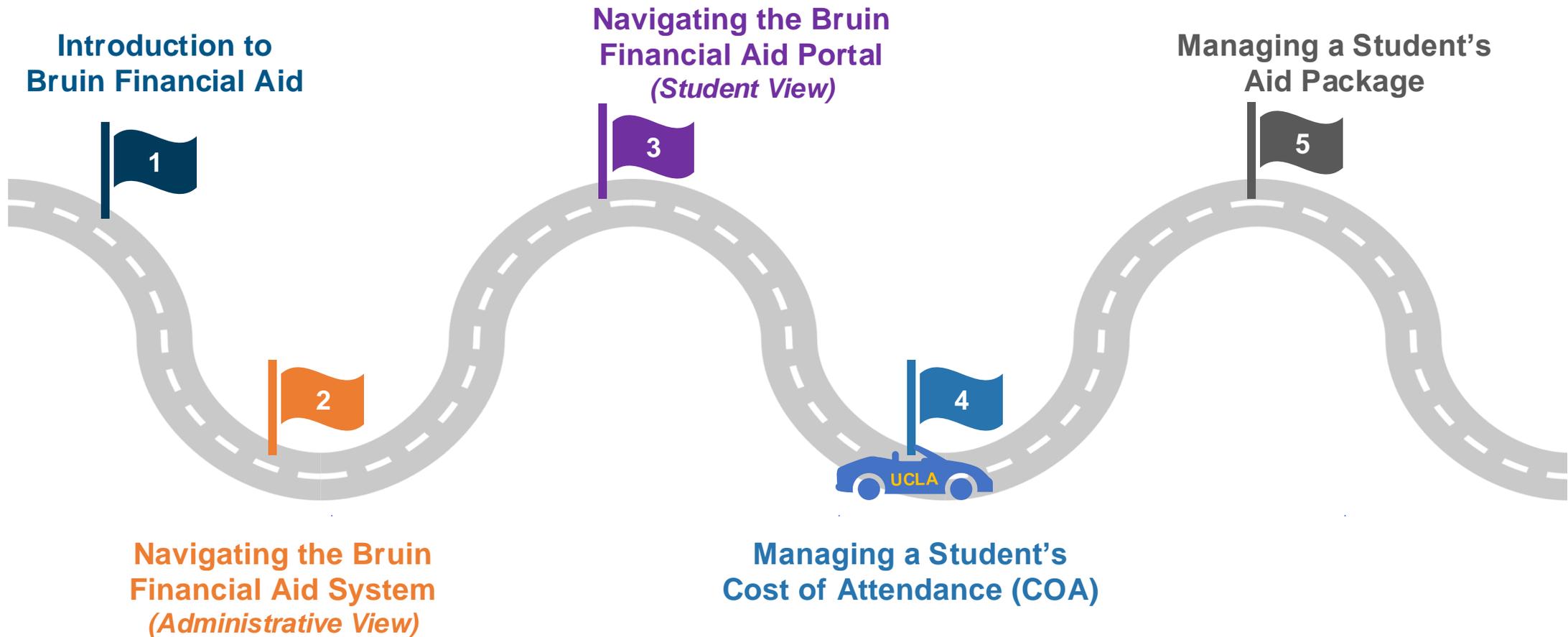


Summary



**OVERVIEW &
LEARNING OBJECTIVES**

OVERVIEW OF RELEASE 1 COURSES



LEARNING OBJECTIVES

By the end of this training, you will be able to:

1

Assist a student with submitting a Budget Increase Form.

2

View, approve, or deny a student's Budget Increase Form.

3

View a student's cost of attendance and understand the components.

4

Adjust a student's cost of attendance manually, if needed.



SUMMARY OF CHANGES

High-level summary of changes that will increase efficiency when managing a student's cost of attendance.

CHANGE	MyUCLA or MAINFRAME	BRUIN FINANCIAL AID
Navigation	The current system has budget codes that help explain components of the student's budget or cost of attendance.	The new system allows you to view a student's cost of attendance (and each cost of attendance component) in one location and by term.
System	In the current system, the cost of attendance includes direct costs which includes tuition and all required fees.	In the new system, the cost of attendance will include standard costs which includes tuition and all required fees.
System	In the current system, the cost of attendance includes indirect costs which includes costs that will vary such as housing, personal expenses, etc.	In the new system, the cost of attendance will include budget costs which includes housing, personal expenses, etc.

TERMS & DEFINITIONS

TERM	DEFINITION
External Student ID	The external student ID is the student's 9-digit UCLA ID Number (UID).
Term	Terms will differ for Summer, Fall, Winter, and Spring; information will now have a numerical value associated with the term (e.g., Term 11-2023 Fall).
Claim a Task	Within the Bruin Financial Aid System, staff must claim and clear a task to proceed with the financial aid process.
Adjustment	An adjustment is a budget add-on.



**VIEW OR ADJUST A STUDENT'S
COST OF ATTENDANCE**

PACKAGING DASHBOARD: COA BY TERM

The Packaging dashboard breaks down the cost of attendance by term. In the example shown, Term 11 is **Fall**, Term 12 is **Winter** and Term 13 is **Spring**. **Note:** If the student has a **Summer** Term, this would be shown as Term 1.

The screenshot shows the Oracle Packaging dashboard for a student. The main section displays the 'Package Summary' for 'Academic Year 1' (09/25/2023-06/14/2024). The package status is 'Partially Awarded' and the repackaging reason is 'PLUS Loan Application Message was received'. The trigger type is 'USDE Update'. Below this, a table lists the items and their amounts:

Item	Amount
Cost of Attendance	\$52,976.00
Tuition and Fees	\$17,217.00
Living and Other Expenses	\$35,759.00
Funds in Package	\$52,976.00
Funds Available for Living and Other Expenses	\$35,759.00
Shortfall to Cover Living and Other Expenses	\$0.00
Shortfall to Cover Tuition and Fees	\$0.00

At the bottom, the 'Academic Year 1' is broken down into three terms:

- Term 11 - 2023 Fall** (Full Time): 09/25/2023 to 12/15/2023
- Term 12 - 2024 Winter** (Full Time): 01/03/2024 to 03/22/2024
- Term 13 - 2024 Spring** (Full Time): 03/27/2024 to 06/14/2024

The screenshot shows the 'Cost of Attendance' breakdown by term. The total cost of attendance is \$26,638.00. The breakdown is as follows:

Term	Category	Item	Amount
Term 11	STANDARD		
	STANDARD		
Term 12	STANDARD		
	BUDGET		
Term 13	STANDARD	Ackerman Student Union Fee	\$23.00
	STANDARD	Art Restoring Community Fee	\$2.00
	STANDARD	Association Fee	\$97.00
	STANDARD	Bruin Bash Fee	\$2.00
	STANDARD	BruinGO Fee	\$3.00
	STANDARD	Green Initiative Fee	\$5.00
	STANDARD	Health Insurance	\$1,067.00
	STANDARD	Pledge Fee	\$22.00
	STANDARD	Seismic Fee	\$37.00
	STANDARD	SPARC Fee	\$45.00
	STANDARD	Wooden Center Fee	\$12.00
	BUDGET	Books & Supplies	\$524.00
	BUDGET	Housing & Meals	\$5,716.00
BUDGET	Personal Expenses	\$551.00	

Note: The terms displayed on the cost of attendance will vary and depend on if the student is a semester student or a quarterly student.

PACKAGING DASHBOARD: CURRENT AND PAST PACKAGES

From the Packaging Dashboard you can also view the student's current and historical packages as well as the student's Cost of Attendance for a specific term.

The screenshot shows the Oracle Packaging Dashboard for a student in a Bachelor of Arts program. The 'Historical Packages' section is expanded, and the 'Package Summary' for 'Term 11' is visible. A yellow callout box points to the '+ Historical Packages' link, and another points to the 'View Details' icon for the 'Cost of Attendance' item in the summary table.

Package Summary
Package Status: Estimated
Repackaging Reason: test
Trigger Type: Inbound Message

Item	Amount
Cost of Attendance	\$26,638.00
Tuition and Fees	\$4,113.00
Living and Other Expenses	\$22,525.00
Funds In Package	\$26,638.00
Funds Available for Living and Other Expenses	\$22,525.00
Shortfall to Cover Living and Other Expenses	\$0.00
Shortfall to Cover Tuition and Fees	\$0.00

Academic Year 1 (09/23/2024-06/13/2025)

Term	Start Date	End Date
Term 11 - 2024 Fall	09/23/2024	12/13/2024
Term 12 - 2025 Winter	01/02/2025	03/21/2025
Term 13 - 2025 Spring	03/26/2025	06/13/2025

Cost of Attendance
Cost of Attendance: \$26,638.00

Term 11

COA includes tuition and fees, loan fees, and budget costs.

Category	Item	Amount
STANDARD	Ackerman Student Union Fee	\$23.00
STANDARD	Art Restoring Community Fee	\$2.00
STANDARD	Association Fee	\$97.00
STANDARD	Bruin Bash Fee	\$2.00
STANDARD	BruinGO Fee	\$3.00
STANDARD	Document Fee	\$165.00
STANDARD	Green Initiative Fee	\$5.00
STANDARD	Health Insurance	\$1,067.00
STANDARD	Pledge Fee	\$22.00
STANDARD	Seismic Fee	\$38.00
STANDARD	SPARC Fee	\$45.00
STANDARD	Wooden Center Fee	\$13.00
BUDGET	Books & Supplies	\$524.00
BUDGET	Housing & Meals	\$5,716.00
BUDGET	Personal Expenses	\$551.00

PACKAGING DASHBOARD: APPROVED BUDGET REQUEST

Once a student's Budget Increase Request Form has been approved, Bruin Financial Aid will automatically update the cost of attendance and package.

ORACLE Dashboard Student Task Administration

Packaging Full-time in Bachelors: Finance started on September 25, 2023 View Student Tasks

Current Package: **Version 18: 04/26/2024**

Historical Packages: Version 17: 03/19/2024, Version 16: 03/19/2024, Version 15: 12/18/2023, Version 14: 12/18/2023, Version 13: 12/18/2023, Version 12: 12/18/2023, Version 11: 12/18/2023, Version 10: 12/18/2023, Version 9: 12/18/2023, Version 8: 12/18/2023, Version 7: 12/18/2023, Version 6: 12/18/2023, Version 5: 12/18/2023, Version 4: 11/17/2023, Version 3: 11/17/2023, Version 2: 11/06/2023, Version 1: 10/30/2023

Resolve Hold Repackage Override Academic Years

Program 01 (Finance) Total Program Credits 180.0 CREDIT Required, 0.0 CREDIT Completed Program FA Eligible Yes

Academic Year 1 ☆

Package Summary
Package Status: Partially Awarded
Repackaging Reason: PLUS Loan Application Message was received
Trigger Type: USDE Update

Item	Amount
Cost of Attendance	\$52,976.00
Tuition and Fees	\$17,217.00
Living and Other Expenses	\$35,759.00
Funds in Package	\$52,976.00
Funds Available for Living and Other Expenses	\$35,759.00
Shortfall to Cover Living and Other Expenses	\$0.00
Shortfall to Cover Tuition and Fees	\$0.00

Academic Year 1 (09/25/2023-06/14/2024) Manage Summer Term

Term 11 - 2023 Fall Full Time 09/25/2023 12/15/2023
 Term 12 - 2024 Winter Full Time 01/03/2024 03/22/2024
 Term 13 - 2024 Spring Full Time 03/27/2024 Today 06/14/2024

Cost of Attendance
 Cost of Attendance: \$52,976.00

Term 11

Category	Item	Amount
STANDARD	Ackerman Student Union Fee	\$23.00
STANDARD	Document Fee	\$165.00
STANDARD	Green Initiative Fee	\$5.00
STANDARD	Health Insurance	\$1,067.00
STANDARD	Pledge Fee	\$22.00
STANDARD	Seismic Fee	\$38.00
STANDARD	SPARC Fee	\$45.00
STANDARD	Student Services Fee	\$392.00
STANDARD	Tuition	\$3,976.00
STANDARD	Wooden Center Fee	\$13.00
BUDGET	Childcare Add On	\$1,000.00
BUDGET	Computer Purchase Add On	\$366.00
BUDGET	Special Projects/Equipment Add On	\$7,000.00
BUDGET	Travel Add On	\$1,400.00
BUDGET	Books & Supplies	\$524.00

Save Adjustment Close

The budget add on will reflect in the break down of the cost of attendance.

Note: It may take up to one business day before the repackaged cost of attendance is visible in the system.

DEMO: VIEW A STUDENT'S COST OF ATTENDANCE



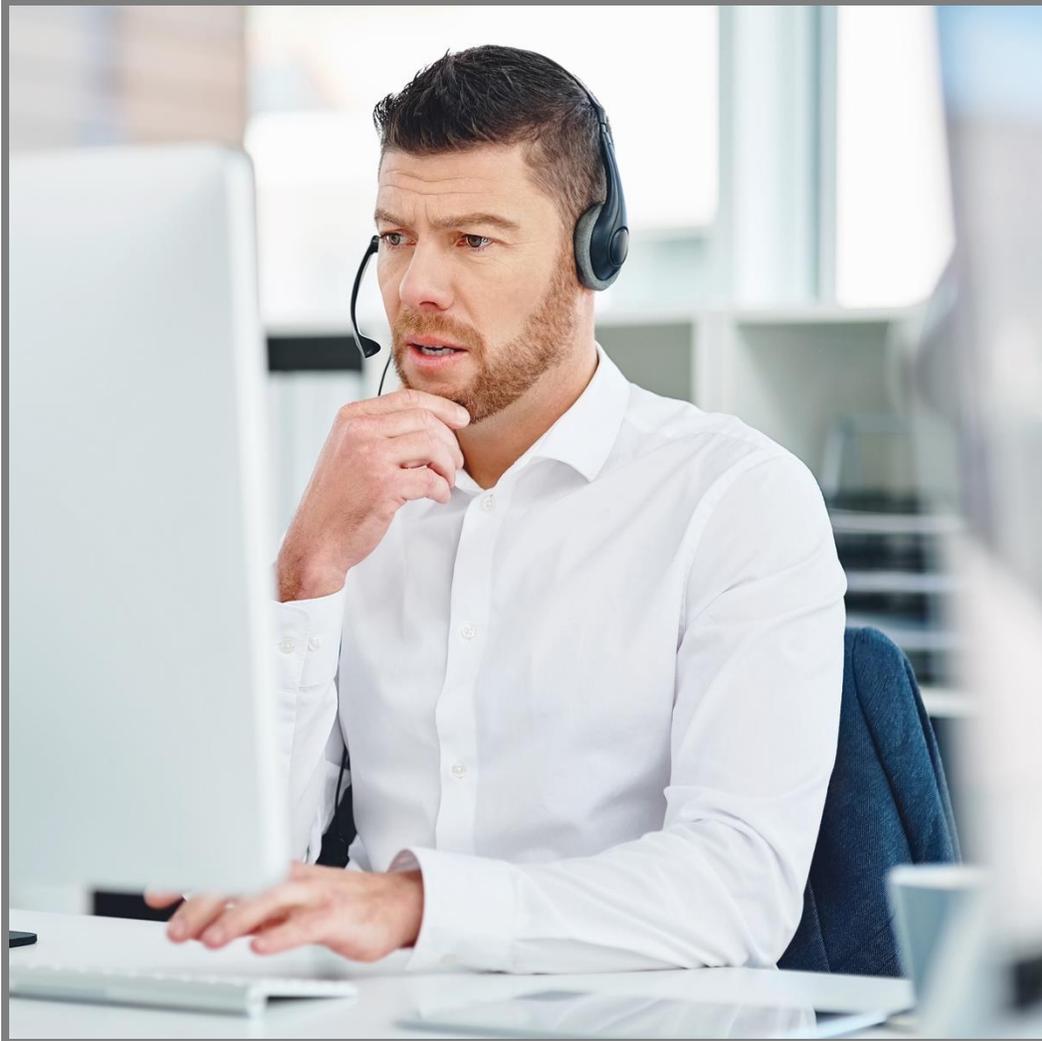
20 minutes



Demonstrate how to view a student's cost of attendance in the Bruin Financial Aid System including how to:

- Search for a student
- Access the student's aid package
- View the student's cost of attendance

INDIVIDUAL ACTIVITY: VIEW A STUDENT'S COA



10 minutes



Scenario:

View a student's cost of attendance.



Tasks:

- Search for a Student (UID #).
- View a student's cost of attendance via the Packaging dashboard.

KNOWLEDGE CHECK 3

On the Packaging screen, which icon allows you to view a student's cost of attendance?

A

Edit icon

B

View Details icon

C

Fund Eligibility icon

D

None of the above

KNOWLEDGE CHECK 3: ANSWER

On the Packaging screen, which icon allows you to view a student's cost of attendance?

A

Edit icon

B

View Details icon

C

Fund Eligibility icon

D

None of the above

MANUALLY ADJUSTING A STUDENT'S COST OF ATTENDANCE

Adjusting a cost of attendance is the manual way of adjusting a student's cost of attendance. **Note: The manual process of adjusting a student's cost of attendance is not recommended with Bruin Financial Aid.**

☰ Term 12

Category	Item	Amount
STANDARD	Ackerman Student Union Fee	\$23.00
STANDARD	Art Restoring Community Fee	\$2.00
STANDARD	Association Fee	\$97.00
STANDARD	Wooden Center Fee	\$12.00
BUDGET	Books & Supplies	\$524.00
BUDGET	Housing & Meals	\$5,716.00
BUDGET	Personal Expenses	\$551.00
BUDGET	Transportation & Travel	\$234.00
Loan Fees	Total Unsubsidized Loan Fee	\$19.00
Loan Fees	Total PLUS Loan Fee	\$288.00

Adjustment **1**

Category	Item	Amount
Adjustment	<input type="text" value="*Required"/> 2	<input type="text" value="*Required"/> 3

4

STEPS

- 1 The **Adjustment** button initiates the manual process.
- 2 Enter the **Item**.
- 3 Enter the **Amount**.
- 4 Click **Save Adjustment**.

DEMO: ADJUSTING A STUDENT'S COST OF ATTENDANCE



10 minutes



Demonstrate how to manually adjust a student's cost of attendance in the Bruin Financial Aid System including how to:

- Search for a student
- Access the student's aid package
- Access the student's cost of attendance
- Enter a manual adjustment

KNOWLEDGE CHECK 4

True or False: Manually adjusting a student's cost of attendance is a recommended best practice.

A

True

B

False

KNOWLEDGE CHECK 4: ANSWER

True or False: Manually adjusting a student's cost of attendance is a recommended best practice.

A

True

B

False