

# Oracle Fusion Student Financial Planning Cloud Service

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**How do I manage fund allocations?**

FA Latest



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# Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

## Get Help in the Applications

Some application pages have help icons  to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

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## Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

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We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

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Thanks for helping us improve our user assistance!



# 1 Overview of Fund Allocation

Oracle Fusion Student Financial Planning (SFP) enables institutions to create a fund allocation schedule to automatically reserve and release specific fund types over the course of the award year.

You can use the application configuration of a fund allocation for fund types awarded within the application on an award year/non-award year basis to limit awarding to the amount allocated within the fund. The application allows the fund to be allocated to configured periods. You can update the amounts within these periods to manage/ensure that funds can be reasonably available throughout the award year. The application also displays relevant fund calculations and you can enter adjustments as the amount of resources changes.

Here's what SFP automatically does:

- Reserves funds from the fund allocation

Once the allocation periods and the amounts per period are established, the application automatically reserves funds for eligible students within the appropriate period. Reserved funds include estimated and awarded funds for eligible students. If a reserved amount associated with an allocation period is updated, the application automatically updates the reserved column.

- Releases awards from the fund allocation

SFP releases funds and calculates the remaining amount available for the allocation period. The application tallies the number of students awarded the fund source and calculates the total amount reserved, released, disbursed, and remaining. The application releases any reserved amounts for a student when the award year associated with the reserved payment period has been updated and when the students planned disbursements in the payment period are less than the reserved amount.

- Repackages student when an allocation period is updated

If you update any allocation period(s) the application automatically evaluates each student's awards when they're being re-packaged and will include or update the fund type if the student is eligible to receive the fund type. The application also repackages any student eligibility changes, resulting in the student becoming eligible or ineligible for the fund source, and immediately recalculates the reserved, released, disbursed and remaining amounts.

Any time a student is repackaged, the application automatically evaluates the student record being re-packaged and updates or includes the fund type if funds are or have become available since the last time the student was packaged.

- Repackages when allocation period are fully reserved

The application completes a re-package for all students with reserved amounts within an allocation period when there's no remaining eligibility is available within the allocation period. The application doesn't allow funds to be reserved or disbursed until an award year allocation schedule has been set up.

- Mass import or update of fund allocation

The FasFundAllocationConfigEvent message lets you create and update the fund allocation configuration for any fund code configured to require a fund allocation. The message allows all create and update functions available on the Fund Allocation FAS UI page. You can submit a message to update the fund allocation configurations for multiple funds or fund allocation periods within a single MPG event. Within the message, you

can define the total fund amount per fund, set allocated amounts and whether the fund can be disbursed for a defined period of time.

**Note:**

- The event message must adhere to existing validation rules enforced in the Fund Allocation management UI, otherwise, the event will not be processed.
- Validation errors are displayed on the Application Event error report.

- Configure the award year allocation schedule

You can configure the periods in which to allocate the fund throughout the award year. To set up the allocation schedule, you must create at least one period to allocate funds. You can then create more periods, set the maximum amount to allocate per period and decide if the period should be ready for disbursement.



## 2 Required Permissions to Manage Fund Allocations

To allocate funds, you must have this permission: Administration.

For more information on permissions, see [Manage General Permissions Matrix](#).



# 3 Create a Fund Allocation

Here's how you create a fund allocation:

1. In SFP, go to **Administration > FAS Management > Fund Allocation Management**.
2. Select the fund type.
3. Click **New Allocation**.
4. Select the award year.
5. Enter the initial fund amount.
6. Click **Save**.
7. Confirm a new allocation schedule for a new award year was created.



## 4 View Fund Allocation Details and Schedule

To view fund allocation details and schedule:

1. In SFP, go to **Administration > FAS Management > Fund Allocation Management**.
2. Enter the fund type.
3. Select an award year.
4. Click **Search**.
5. Review the Fund Allocation Configuration.
6. Review the Fund Allocation Schedule.
7. Click the number in the Pending Disbursements column to view details associated to pending disbursements.



# 5 Manage Fund Allocations

## Manage Fund Allocations

When you edit a fund allocation, you can update the initial fund amount, update the allocation period dates, redistribute funds and choose if funds will be available for disbursement.

When reallocating funds:

- You can add allocation periods as necessary, but periods can't overlap.
- You can add funds to an allocation period without requiring the reduction of future periods resulting in a total that exceeds the award year allocation. However, SFP will not allow you to save the updates until an alternate period is reduced so the total allocation for all periods is equal to or less than the award year amount.
- SFP doesn't alert you while you're making incremental adjustments to each allocation period if the updates result in an excess of the total fund allocation for the award year. However, SFP does alert if you try to save updates and the exceeds the total fund allocation.
- You can't redistribute funds that would result in a remaining balance that's less than the reserved amount for that configured period. For example, if the allocation amount for a specific period is \$10,000 and the reserved amount for that period is \$8,000, the user can redistribute the remaining \$2,000. If the user try to redistribute \$2,001, SFP will not allow the request to be completed.

When making adjustments to the fund allocation, you can adjust the fund amount by applying credits or debits to the initial fund amount. SFP doesn't allow funds in excess of the awarded total amount. If applicable, you can set a deposit date and payment type for any credits to the fund allocation. As credits and debits are applied, SFP provides notes in the student history and you can identify the source using an available menu of fund sources.

## Edit the Initial Fund Amount

Here's how you edit the initial fund amount:

1. In SFP, go to **Administration > FAS Management > Fund Allocation Management**.
2. Choose the fund type and associated award year.
3. Click **Edit**.
4. Update the initial fund amount.
5. Click **Save**.

## Adjust Allocation Period Dates

Here's how you adjust allocation period dates:

1. In SFP, go to **Administration > FAS Management > Fund Allocation Management**.

2. Choose the fund type and associated award year.
3. Click **Edit**.
4. Click the date you want to adjust and use the calendar picker to select a new date.
5. Click **Save**.

## Make Funds Available for Disbursement

Here's how you make funds available for disbursement:

1. In SFP, go to **Administration > FAS Management > Fund Allocation Management**.
2. Choose the fund type and associated award year.
3. Click **Edit**.
4. Check the "Ready for Disbursement" check box for the allocation period you want to make available.
5. Click **Save**.

## Create a New Allocation Period

Here's how you create a new allocation period:

1. In SFP, go to **Administration > FAS Management > Fund Allocation Management**.
2. Choose the fund type and associated award year.
3. Click **Edit**.
4. Click **New** to add a new allocation period.
5. Confirm a new allocation period is added and update as necessary.
6. Click **Save**.

## Reallocate the Funds

Here's how you reallocate the funds:

1. In SFP, go to **Administration > FAS Management > Fund Allocation Management**.
2. Choose the fund type and associated award year.
3. Click **Edit**.
4. Enter a new amount for each allocation period you want to update.
5. Click **Save**.



## Add an Adjustment

Here's how you add an adjustment:

1. In SFP, go to **Administration > FAS Management > Fund Allocation Management**.
2. Choose the fund type and associated award year.
3. Click **Edit**.
4. In Adjustments to Fund Allocation, click **New**.
5. Enter all the necessary adjustment information:
  - Adjustment
  - Comments
  - Source Type
  - Payment Type
  - Deposit Date (current system date auto populates)
  - Date of Adjustment (current system date auto populates)

