Creating a Financial Aid Item Type

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Item types must be created before any financial transaction can be carried out in Campus Solutions. Item Types are a combination of attributes. The key elements of a financial aid Item Type (in terms of Departmental Award Entry) are: Chartstring (account, fund, dept, etc.) and the Charge Priority (what can be paid by this Item Type).

The following shows the steps necessary for creating a Financial Aid Item Type, as part of the Department Award Entry process to provide gift aid to students.

In this example, we have been asked to award a stipend to a student using a chartstring that hasn’t been used before. We will begin an Award Entry batch, realize we need a new Item Type and proceed to create a new Financial Aid Item Type, then save our Award Entry batch. For more information about entering a department Award (apart from the Item Type creation portion), please review the Entering Department Awards job aid.

Navigate to Cal Components>Financial Aid>Award Entry>Award Entry

In this example, we are adding a new department award, so we will click the Add a New Value tab.

We have selected an Academic Career; verified the Financial Aid Type is Department Awards, entered a Department code in the Organizational Level 4 field and entered a name in the Award Batch Package field. When all required fields are filled in, we will click the Add button.
The Award Entry page displays.

We will proceed to the **Awards** section to search for an Item Type that matches the funding source (chartstring) and that will disburse as we wish (towards paying fees, disbursing to student, etc.)

To find an Item Type that has the desired chartstring and **Charge Priority**, click the **Advanced Search** lookup.

The **Item Type Search** page displays.

For department awards, the most common searches will be for chartstring information and/or **Charge Priority** (whether this award will apply to certain fees and/or disburse to the student). For definitions of the Charge Priorities and what they will apply to, please see the **Charge Priority job aid**.

If you are creating an Item Type for summer, click the **Summer Award** checkbox.

In this example, we have entered the chartstring (Account, Fund, Dept, Program) and we have selected a Charge Priority of **F_Refund** that is set to disburse money directly to a student.

Then we will click **Search** to look for an Item Type that matches our criteria.
If there is a match, the existing Item Type(s) will display below.

However, in this case, there is no existing Item Type that matches our criteria. A message pops up letting us know there are no Item Types for this combination of chartstring and Charge Priority.

We will click OK to acknowledge the message.

We have determined that we need to create a new Item Type that can be used in our Award Entry batch.

Click the Create New Item button.
The **Item Type** request page will display.

In the **General** section, we will add a **Short Description** (10 characters max) of the award.

This is so that in the future we could look up this item type by the Short Description. This description will not be seen by students or anywhere outside of *Campus Solutions*.

If you do not have a name for the Item Type or do not plan to look it up by short description in the future, you could just call it “Dept“.

In this case, since we’re using *Oski BearGrant* funds, we will add a short description of “*OskiBrGrnt*.”
The **Additional Description** field is *optional*. It is currently not set up to display to students.

In this example, added an additional description called “*Oski Bear Grant funds*”.

No matter what names you choose when creating the Item Type, the student will see they have a Departmental Award from the Department.

This is an example of what a student sees in *CalCentral*.
In the Characteristics section, we will select which Charge Priority to use (whether we will be paying certain fees or disbursing to the student).

Click the Charge Priority look up icon to see the available choices. For further definitions and whether specific fees will be paid, refer to the Charge Priority job aid.

Depending on whether we wish to pay all fees (P_ALL_N), only certain fees such as Tuition & Mandatory fees (F_TUIMAN) or only a NRST fee (F_NR_SUP), or disburse funds directly to a student (F_Refund), we would select the appropriate Charge Priority.

In this example, we’d like to pay a stipend to a student and not apply any funds towards a fee on their bill. So in this example, we will select F_REFUND.

**NOTE:** This is not a reimbursement.
Refundability refers to whether any amount may be disbursed to the student. When selecting F_REFUND, we’re indicating the full amount should disburse to the student, regardless of any outstanding charges on their account.

**NOTE:** Students must be enrolled in at least 1 unit to receive a Departmental Award, so “enrollment required” is defaulted for all Financial Aid Item Types. Students on filing
fee status can no longer be paid Departmental Awards. (This was a policy change that was decided by the Vice Chancellor for Graduate Affairs in September 2016).

In the **Chart of Account** section, we will enter our chartstring information. We can type the values in directly, or use the lookup icons to search.

We have filled in our chartstring (Account, Fund, Dept).

We must click the **Validate** button to ensure that the system recognizes this as a valid chartstring.

If it is valid, we will see the word **Success** in the box below.

**WARNING:** If you do not click the **Validate** button, or if the system does not recognize the chartstring as valid, you will not be able to proceed.
Once we have filled out all the required fields and successfully validated our chartstring, we will click the **OK** button at the bottom of the page.

This will submit the Item Type to be approved. The approvals process runs twice a day.

The system returns us to the **Item Type Search** page we were previously on.

The new Item Type number has carried over to the bottom of the page.

Make sure to click the radio button to the left of the Item Type number.

**NOTE:** If you accidentally click the number, just click the **Cancel** button to return to this page.

Once the new Item Type number is selected, we'll click the **Return** button to go back to the **Awards Entry** page.
On the Awards Entry page, we’ll see the new Item Type number filled in, with a status of Pending.

When it is approved, the status will change to Active. You should also receive an email that the Item Type has been approved.

We can now continue filling out the rest of the Award Entry batch, but remember that the batch can not move forward to the Approver until the Item Type has been approved.

We could also wait until we know the Item Type has been approved and is active, then come back and fill out the rest of the Award Entry batch.

In this example, we will click Save to record our batch with the pending Item Type number then come back later to finish the entry.

See the Find Existing Award job aid if you need assistance looking up an Award Entry batch.

Support

For questions or assistance, please contact SIS Support:

- Call 510-664-9000 (press option 6 to reach SIS support)
- Email: sishelp@berkeley.edu
- Submit a ticket: https://berkeley.service-now.com/ess/create_incident