

## Creating a Financial Aid Item Type

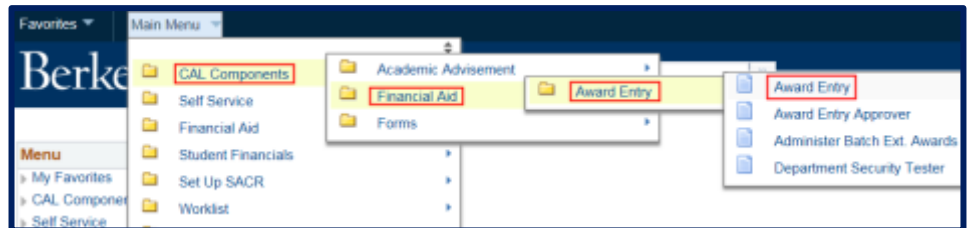
**Path: Cal Components>Financial Aid>Award Entry>Award Entry**

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.

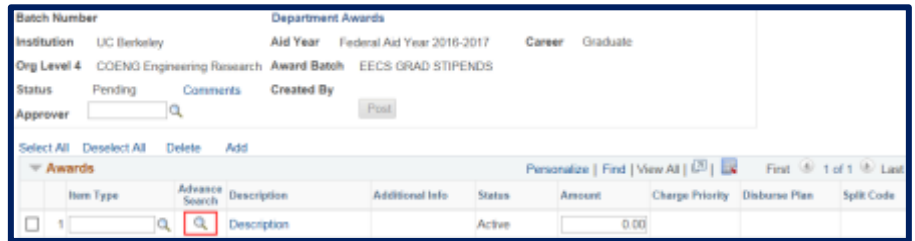
The screenshot shows the 'Add a New Value' form. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value', with the latter selected and highlighted in red. The form contains the following fields:


- Academic Institution: UCB01 (with a search icon)
- Aid Year: 2017 (with a search icon)
- Academic Career: Graduate (dropdown menu)
- Financial Aid Type: Department Awards (dropdown menu)
- Organization Level 4: EERES (with a search icon)
- Award Batch Package: EECS grad stipends (with a search icon)

At the bottom of the form, there is a red-bordered '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](#).

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.

If filled out, students will see this text along with the label "Department Award" and the department name.

Here is an example of the default view (with no Additional Description) in CalCentral.

**Awards**

Financial aid awards are offered to meet your need up to your student budget (estimated cost of attendance).

Term View

Gift Aid Report Outside Resources

Department Award	
College of Engineering	
\$ 12,584.85	\$ 12,584.85
ACCEPTED	DISBURSED

In this example, we will add an additional description that would show below the college name. We will add "Oski Bear Grant funds".

**General**

Award Source [dropdown] Item Type 945100054380

Description Departmental Award \*Short Desc OskiBrGrnt

Keywords 1. [dropdown] 2. GIFT-OTHER 3. [dropdown]

Additional Description (viewable by student)

Oski Bear Grant funds

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.


**General**

Award Source [dropdown] Description Departmental Award

Keywords 1. [dropdown]

Additional Description (viewable by student) Oski Bear Grant funds

**Characteristics**

\*Charge Priority [dropdown]  Enrollment Required

**Look Up Charge Priority**

SetID: UCB01

Charge Priority List: begins with [dropdown]

Description: begins with [dropdown]

Look Up Clear Cancel Basic Lookup

**Search Results**

Charge Priority List	Description
F_ALL_N	Pay All - No TIV Permission
F_ALL_T4	Pays All Charges
F_HOUSNG	Housing Only
F_HSNG_N	Pay Housing/Meals - No Perm
F_LN_N	Loan pay all no perm required
F_LN_T4	Loan Pay All subj to TIV perm
F_NONRES	Non-Resident Fees Only
F_NR_SUP	Non Res Supp Tuition Only
F_PLN_T4	PLUS Loan Pay All
<b>F_REFUND</b>	<b>Refunds/Stipends Only</b>
F_SHIP	Health Insurance (SHIP) Only
F_SHIP_N	Pay SHIP - No Permission Req'd
F_SSRV	Tuition and Student Svcs Only
F_TAX_N	Pay 1042S Tax W/ih - No Perm
F_TM_XNP	Tuition-Mandatory Fees Only
F_TM_XPD	Tuition & Mand Fees Excl PDST
F_TM_XS	Tuition & Man Fees - No Ship
F_TUIMAN	Tuition & Mandatory Fees Only
F_TUIT	Tuition Only

In this example, we would like to pay a stipend to a student and not apply any of those funds towards a fee on their bill. So in this example, we will select **F\_REFUND**.

### Characteristics

<b>*Charge Priority</b> <span style="border: 1px solid red; padding: 2px;">F_REFUND</span>	<b>Institution Reporting Cd</b> SK1
<input checked="" type="checkbox"/> <b>Enrollment Required</b>	<input checked="" type="checkbox"/> <b>GL Interface Required</b>
	<input type="checkbox"/> <b>Summer</b> -

**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).

When Summer 2017 term is set up in *Campus Solutions*, the **Summer** checkbox will become enabled so we could click that box for summer Item Types.

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.

**Characteristics**

\*Charge Priority: F\_REFUND

Enrollment Required

**Chart of Account**

Account:  🔍

Fund Code:  🔍

Department (number):  🔍

Program Code: 78

Chartfield 1:  🔍

Chartfield 2:  🔍

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**Look Up Account**

Account:  begins with

Description:  begins with

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**Search Results**

View 100 First 1-11 of 11 Last

Account	Description
53803	U/G Partial Fee Remission
57412	U/G Misc Payments-Stipends
<b>57415</b>	<b>Grad Misc Payments-Stipends</b>
57422	U/G Misc Payments-Tuition/Fees
57425	Grad Misc Payment-Tuition/Fees
57430	Grad Fellowships-Travel
57442	U/G Misc Payments-General
57445	Grad Misc Payments-General
57450	Student Appreciation/Awards
57455	Research Training Awards

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.

**Chart of Account**

Account: 57415 🔍 Grad Misc Payments-Stipends

Fund Code: 96302 🔍 UM-3001996

Department (number): 23797 🔍 EERES BNSG

Program Code: 78 Student Financial Aid

Chartfield 1:  🔍

Chartfield 2:  🔍

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**Success**

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 reviewed and approved by a member of the Student Financials team.

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.

Item Type	Description	Additional Info
1 945100054380	Departmental Award	



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 now have the choice to either continue filling out the rest of the Award Entry batch (knowing that the batch can not move forward to the Approver until the Item Type has been approved).

Or we could 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 save our batch with the pending Item Type 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.

This screenshot shows the 'Department Awards' entry form. The 'Item Type' field contains the value '1 945100054380' and the 'Status' is 'Pending'. The 'Award Batch' is 'EECS GRAD STIPENDS'. A 'Post' button is visible at the bottom right of the form.

Item Type	Advance Search	Description	Additional Info	Status	Amount	Charge Priority
1 945100054380	<input type="checkbox"/>	Departmental Award		Pending	0.00	Refunds/Stipends Only

This screenshot shows the 'Students' and 'Disbursements' sections of the Awards Entry page. The 'Students' section has a search table with columns for Student ID, Name, and Award Summary. The 'Disbursements' section has a table with columns for Item Type, Student Award Description, Student ID, Disburse Plan, Split Code, and Award Amount. A 'Save' button is located at the bottom left.

Item Type	Student Award Description	Student ID	Disburse Plan	Split Code	Award Amount
1					0.00

## Support

For questions or assistance, please contact SIS Support.:

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