

## Creating a New Financial Aid Item Type

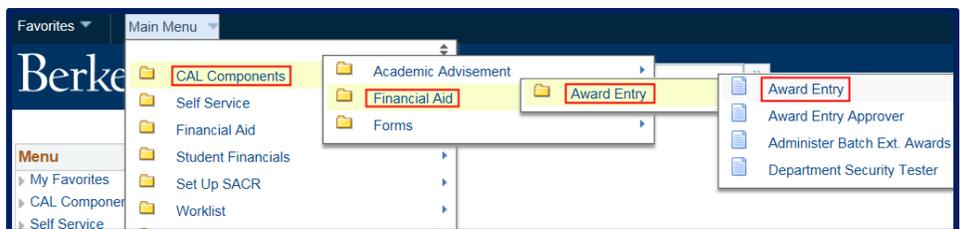
**Path: Cal Components>Financial Aid>Award Entry>Award Entry**

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, click the **Add** button.

The screenshot shows the 'Add a New Value' form. The fields are filled with the following information:
 

- Academic Institution: UCB01
- Aid Year: 2017
- Academic Career: Graduate
- Financial Aid Type: Department Awards
- Organization Level 4: EHEEC
- Award Batch Name: EHEEC grad stipends

 The 'Add a New Value' tab is highlighted with a red box, and the 'Add' button at the bottom is also highlighted with a red box.

The Award Entry page displays.

We'll proceed to the **Awards** section to search for an Item Type that matches the funding source (chartstring) and that will disburse as wished (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 are for chartstring and/or **Charge Priority** (whether this award will apply to certain fees and/or disburse to the student). For definitions 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. (For Summer *only*, the **Enrollment Required** box can be unchecked if the student is not enrolled.)

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'll 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.

The screenshot shows a search form with fields for Key Word 2, Key Word 3, Charge Priority (set to F\_REFUND), Refundable Indicator, Account (57415), Fund Code (37250), Department (number) (25336), and Program Code (78). A message dialog box is open, displaying the text: "Message" and "An Item Type is not available for the criteria you entered (26000,141)". An "OK" button is visible in the message box, highlighted with a red border.

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.

This screenshot shows the same search form as the previous one, but with the "Create New Item" button highlighted with a red border. The form fields are: Charge Priority (F\_REFUND), Refundable Indicator, Enrollment Required? (checked), Summer Award? (unchecked), Account (57415), Fund Code (37250), Department (number) (25336), Program Code (78), Chartfield 1, and Chartfield 2. There are also "Search" and "Return" buttons.

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*. Any information added in this field is visible to students and should be used only for the purposes of making an award identifiable to a student.

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

### General

Award Source:  Item Type: 945100102910

Description: Departmental Award \*Short Desc: OskiBrGrnt

Keywords: 1.  2. GIFT-OTHER 3.

Additional Description (viewable by student): 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*.

### 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 the **Characteristics** section, we will select which Charge Priority to use (whether we will be paying certain fees or disbursing to the student).

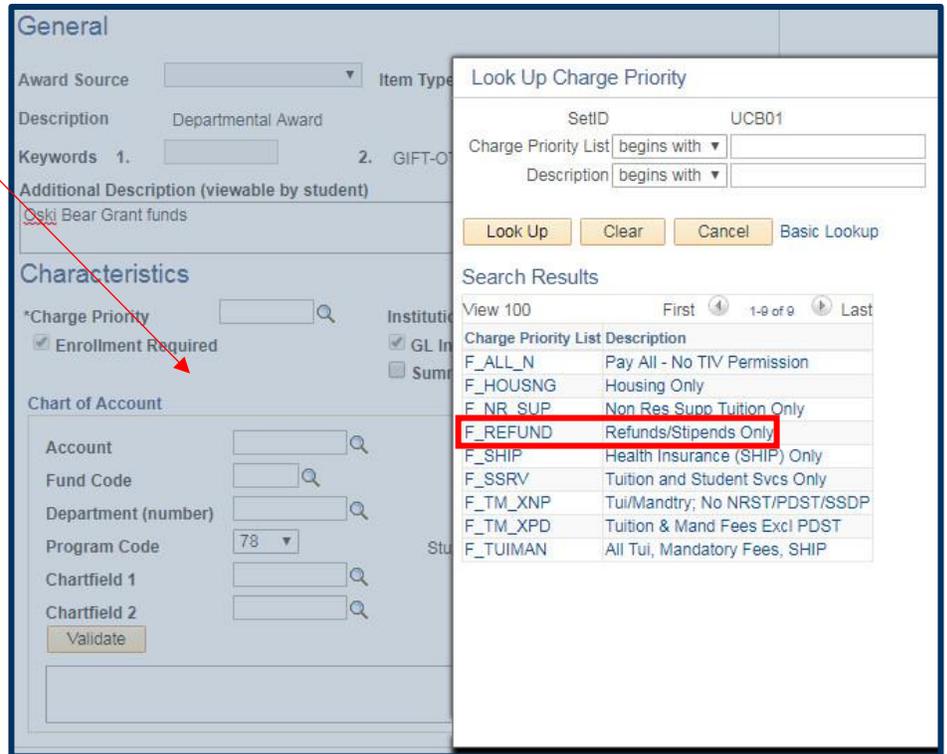
Click the **Charge Priority** look up icon  to see the available choices. For further definitions and whether specific fees will be paid, refer to the [Charge Priority job aid](#).

Depending on whether we wish to pay all fees (**F\_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 charge on their bill. So in this example, we will select **F\_REFUND**.

**NOTE:** 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 academic year 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).



**Look Up Charge Priority**

SetID: UCB01

Charge Priority List: begins with

Description: begins with

Buttons: Look Up, Clear, Cancel, Basic Lookup

**Search Results**

View 100 | First | 1-9 of 9 | Last

Charge Priority List	Description
F_ALL_N	Pay All - No TIV Permission
F_HOUSNG	Housing Only
F_NR_SUP	Non Res Supp Tuition Only
<b>F_REFUND</b>	<b>Refunds/Stipends Only</b>
F_SHIP	Health Insurance (SHIP) Only
F_SSRV	Tuition and Student Svcs Only
F_TM_XNP	Tui/Mandtry; No NRST/PDST/SSDP
F_TM_XPD	Tuition & Mand Fees Excl PDST
F_TUIMAN	All Tui, Mandatory Fees, SHIP



**Characteristics**

\*Charge Priority: **F\_REFUND**

Enrollment Required

Institution Reporting Cd: SK1

GL Interface Required

Summer

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: [ ]

Validate

**Look Up Account**

Account: begins with [ ]

Description: begins with [ ]

Look Up Clear Cancel

**Search Results**

View 100 First 1-11 of 11 Last

Account	Description
53803	U/G Partial Fee Remission
57412	U/G Misc Payments-Stipends
57415	Grad Misc Payments-Stipends
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

Fund Code: 37250

Department (number): 25336

Program Code: 78

Chartfield 1: [ ]

Chartfield 2: [ ]

Validate

Success

Grad Misc Payments-Stipends

MORRISON MAY T FUND

KNBAM BAM FA Facilities Gen

Student Financial Aid

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.

	Item Type	Description	Additional Info	Charge Priority
<input checked="" type="radio"/>	1 945100102940	Departmental Award	Oski Bear Grant funds 57415-37250-25336-78- -	F_REFUND

On the **Awards Entry** page, we'll see the new Item Type number filled in, with a status of **Pending**.

Click **Save**. The newly created item type will not be approved if the batch is not saved.

When it is approved (by an automated process that runs twice daily), the status will change to **Active**.

The screenshot shows the 'Department Awards' form. The 'Item Type' field contains '945100102910' and the 'Status' is 'Pending'. The 'Award Batch' is 'EHEEC GRAD STIPENDS'. The 'Additional Info' field contains 'Oski Bear Grant funds 00100-23797-78- -'. The 'Amount' is '0.00' and the 'Charge Priority' is 'F\_REFUND'. The 'Disburse Plan' is 'AY' and the 'Split Code' is 'FS'.

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

In this example, we don't finish the whole process and so we did not add an Approver. Trying to save the Award batch at its current state would result in a popup message like the one shown.

The screenshot shows the 'Department Awards' form with a warning message popup. The 'Approver' field is empty. The warning message says: 'Warning: An approver has not been chosen yet (26000,129)'. The 'Save' button is highlighted in red.

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.

The screenshot shows the 'Department Awards' form with the 'Save' button highlighted in red. The 'Item Type' is '945100102910' and the 'Status' is 'Pending'. The 'Award Batch' is 'EHEEC GRAD STIPENDS'. The 'Additional Info' field contains 'Oski Bear Grant funds 00100-23797-78- -'. The 'Amount' is '0.00' and the 'Charge Priority' is 'F\_REFUND'. The 'Disburse Plan' is 'AY' and the 'Split Code' is 'FS'.

## Support

For questions or assistance, please contact: [awardentry@berkeley.edu](mailto:awardentry@berkeley.edu)