Overview

A new Item Type Request Form has been created to formalize the item type request, approval and creation processes. The purpose of this manual is to provide step-by-step instructions for those who request and/or approve new item types for Graduate Awards, Financial Aid, Prizes, Awards, Stipends, etc.

Please reach out to the Office of Student Accounts (student.accounts@vanderbilt.edu) with any questions or concerns.

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Quick Links:

Item Type Request Form
Approver Link

Access needed:

Access to Docfinity Item Type Request form – If access is needed, submit a Student Financials Access Request from this link: https://www.vanderbilt.edu/stuaccts/staff/mis.php

DUO multi-factor authentication

Requestors – PeopleSoft Queries to prevent duplicate requests; Access Form
Item Type Request Form

Prior to requesting a new item type, please verify that one does not already exist in PeopleSoft by using the two queries listed below. Within PeopleSoft: Main Menu > Reporting Tools > Query > Query Viewer

VU_SF_GRAD_AWARD_LOOKUP_POET
VU_SF_GRAD_AWARD_LOOKUP_COA

Link to item type request form: Item Type Request Form

For Grad Award item types, use the top two buttons. Choose POET if POET information is required. Choose COA only if no POET information exists.

For Financial Aid item types, use the bottom two buttons. Choose POET if POET information is required. Choose COA only if no POET information exists.

Requestor Information – Fill out form completely. All fields are required.

Item Type Information Section

Category – Select what charges this item type can be used for (Tuition, Insurance, Fees, etc.)

Item Type Description – Select the description that describes what the item type is being used for.

This is a financial aid item type –

No – indicates the item type is a Graduate Award (entered via the Graduate Award panel)

Yes – Fin_Aid – federal financial aid disbursed by the Office of Financial Aid

Yes – Fin_Reg – institutional aid not specific to a type of charge to be paid; i.e. a general scholarship that can pay anything and disbursed by the Office of Financial Aid

Yes – Use Category – institutional aid restricted to paying a certain type of charge; such as tuition only (please ensure the category chosen above is what the funds are restricted to paying)

Comments – Enter any information that may be beneficial for the approvers; if the item type is Federal Financial Aid, include the associated agency here

POET Information

   Project – Enter project number
Organization – Automatically populated once the project number is entered

Expenditure Type – Available options dictated by the Category chosen

Task – Available options dictated by the project number
**COA Information** – For a COA only item type, all COA information must be manually entered/chosen

- Entity – Automatically populated once project number is entered
- NAC – Available options dictated by the project number
- Financial Unit – Available options dictated by the project number; please verify for accuracy; if inaccurate, please enter the correct Financial Unit in the Comments
- Account – Available options dictated by the Category chosen
- Program – must be manually populated
- Activity – must be manually populated

Once completed, please review all information for accuracy and check the box verifying you have done so before submitting your request.

**POET Request Example**

**Item Type Request**

**Requestor Information**

<table>
<thead>
<tr>
<th>Requestor Name</th>
<th>Requestor Email Address</th>
<th>Requestor Work Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carol Morrison</td>
<td><a href="mailto:carol.morrison@vanderbilt.edu">carol.morrison@vanderbilt.edu</a></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>* Requestor Organization</th>
<th>* Requestor Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>College of Arts &amp; Science</td>
<td>12600 - Arts and Sciences, Office of the Dean</td>
</tr>
</tbody>
</table>

**Item Type Information**

- Category
- Item Type Description

<table>
<thead>
<tr>
<th>Category</th>
<th>Item Type Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition - Final Grad</td>
<td>GRAD TUITION AWARD</td>
</tr>
</tbody>
</table>

- This is a financial aid item type
- Comments

| No | |

**POET Information**

<table>
<thead>
<tr>
<th>Project</th>
<th>Organization</th>
<th>Expenditure Type</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>600131</td>
<td>12540</td>
<td>FIndTg - FinancialAid - Graduate Tuition</td>
<td>1 - Grants Task</td>
</tr>
</tbody>
</table>

**COA Information**

<table>
<thead>
<tr>
<th>Entity</th>
<th>NAC</th>
<th>Financial Unit</th>
<th>Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>125</td>
<td>15 - Sponsored Contracts</td>
<td>12540 - Mathematics</td>
<td>1223</td>
</tr>
</tbody>
</table>

- Program
- Activity

* I have reviewed all of the information and am ready to submit this form.

Submit Request
COA Request Example

Once your request has been submitted, you will be taken to the following screen and an email will be sent to you from acadafdf@vanderbilt.edu confirming the information you provided.

To submit additional request(s), simply double click on the SA.ITR.Request/SA.ITR.Request.GradAward if a POET value is involved, double click on SA.ITR.RequestCOA/SA.ITR.RequestCOA.GradAward for the COA only form.
Approval routings once a request has been submitted are as follows:

Non-Financial Aid: Request → CBO Approver Group → Student Accounts → Requestor

Financial Aid: Request → CBO Approver Group → Student Accounts → Financial Aid → Requestor

The new item type will be created by the Office of Student Accounts once the request has been properly approved. An email notification will be sent to the requestor with the new item type number when it is available for use.

If the item type is also a financial aid item type, once it has been created, it will then flow to financial aid to set-up in their system, and the email to the requestor will be sent after financial aid has completed the appropriate set-up.

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Sample of email

Hello Amanda Wetman,

Your Item Type Request has been submitted. It will be reviewed and you will be notified of the status when review is complete.

You may reference this ID number if you require assistance with this request: 07202a33a6ec5a070c0d479b60010000

Request Information:
Category: Tuition - FinAid Grad
Description: Tuition Grad Award

Requestor Comments:

POET Information
Project: 6001084
Organization: 15250
Expenditure Type: FaidTGS - Financial Aid - Graduate Tuition
Task: 1 - Grants Task

COA Information
Entity: 150
NAC: 15 - Sponsored Contracts and Grants Financial Unit: 15250 - Mechanical Engineering
Account: 1223
Program: 000
Activity: 000

If you have any questions, please contact the Office of Student Accounts.

Sincerely,
Office of Student Accounts
Vanderbilt University
student.accounts@vanderbilt.edu
**Item Type Approval**

Click this link [DF PROD SSO](#) to approve requests for new item types.

Click on WORKSPACES, then JOB ASSIGNMENTS

Double click on “Item Type Request” The bottom right of the screen will show requests that need to be reviewed. Please note that this will show **ALL** requests awaiting approval, and not just the ones for your area.

Sort the requests by clicking on any of the columns (Requestor Name, Requestor Department, Entity, Financial Unit, Project Number) to find the requests for your area.
Double click on the request you wish to review, and it will show up in the box above the “Jobs: Item Type Request” section

Please ensure that all information is accurate (both COA and POET when appropriate)

After review, complete the Tasks section to approve or deny the request.

When checking the box for Approve or deny item type request, you will be asked to approve or deny. To approve, click that you’ve reviewed your response and are ready to submit. Once submitted, the request will flow to the next area for approval/set-up depending on what stage it is in.

To deny, you will have to state a reason why. Denials will result in an email with the requested information and reason for denial sent to the requestor.