

Vanderbilt University Office of Student Accounts

Item Type Request Procedure Manual

Last Updated:
10-28-2020

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.

Contents

Requestor Instructions	p. 2 - 5
Approver Instructions	p. 6 - 7

Quick Links:

[Item Type Request Form](#)

[Approver Link](#)

Access needed:

Access to Docfinity Item Type Request form – If access is needed, contact Office of Student Accounts - student.accounts@vanderbilt.edu

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](#)



Item Type Request

Item Type Request: POET

Item Type Request: COA Only

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 – Enter what you would like the name/description of the item type to be in PeopleSoft

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

* Requestor Name	* Requestor Email Address	* Requestor Work Phone Number
<input type="text" value="Amanda Weisman"/>	<input type="text" value="amanda.weisman@vanderbilt.edu"/>	<input type="text" value="615-885-8837"/>
* Requestor Organization	* Requestor Department	
<input type="text" value="School of Engineering"/>	<input type="text" value="15000 - Engineering: Office of the Dean"/>	

Item Type Information

* Category	* Item Type Description
<input type="text" value="Tuition - FinAid Grad"/>	<input type="text" value="Tuition Grad Award"/>
This is a financial aid item type	Comments
<input type="text" value="No"/>	<input type="text"/>

POET Information

* Project	* Organization	* Expenditure Type	* Task
<input type="text" value="601084"/>	<input type="text" value="15250"/>	<input type="text" value="FAidTG - Financial Aid - Graduate Tuition"/>	<input type="text" value="1 - Grants Task"/>

COA Information

* Entity	* NIAC	* Financial Unit	* Account
<input type="text" value="150"/>	<input type="text" value="15 - Sponsored Contracts ar"/>	<input type="text" value="15250 - Mechanical Engineering"/>	<input type="text" value="1223"/>
* Program	* Activity		
<input type="text" value="000"/>	<input type="text" value="000"/>		

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

COA Request Example

Edit SA.ITR.RequestCOA - Step 1 - Forms

View Edit Close Delete Save Submit Refresh

Item Type Request

Requestor Information

* Requestor Name: Amanda Weisman
* Requestor Email Address: amanda.weisman@vanderbilt.edu
* Requestor Work Phone Number: 615-885-8837

* Requestor Organization: College of Arts & Science
* Requestor Department: 12500 - Division of Science: Office of the Dean

Item Type Information

* Category: Insurance - Grad
* Item Type Description: Grad Insurance Award

This is a financial aid item type: No
Comments:

COA Information

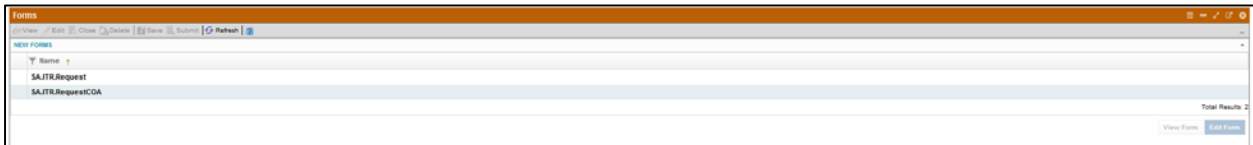
* Entity: 125
* NAC: 05 - General Unrestricted
* Financial Unit: 12500 - Division of Science: Office of the Dean
* Account: 1211

* Program: 000
* Activity: 000

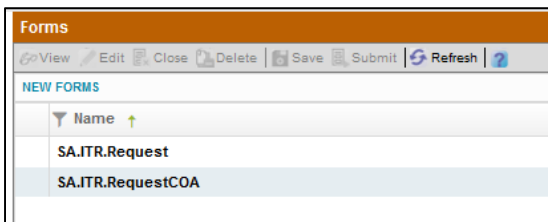
* I have reviewed all of the information and am ready to submit this form.

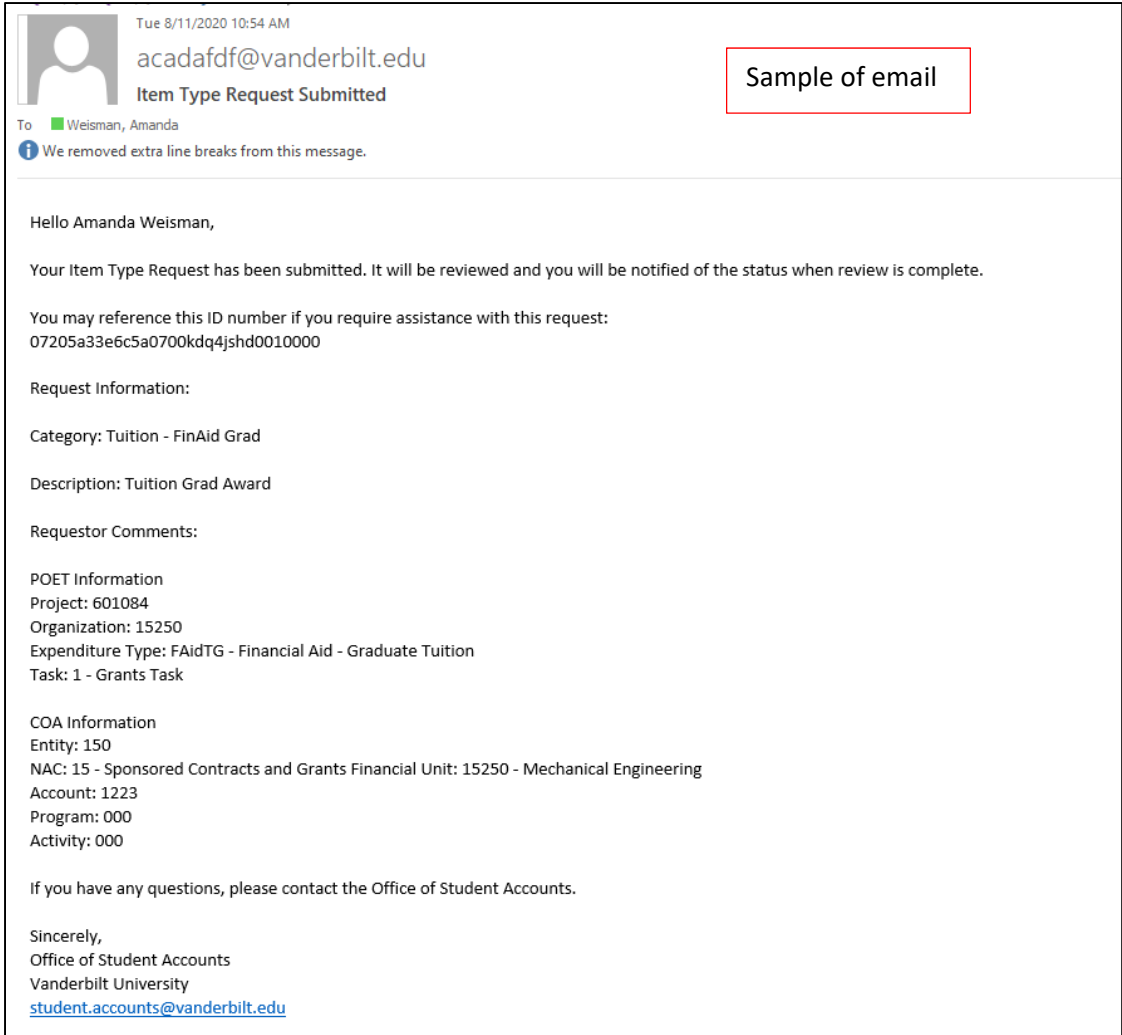
Submit Request

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 if a POET value is involved, double click on SA.ITR.RequestCOA 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

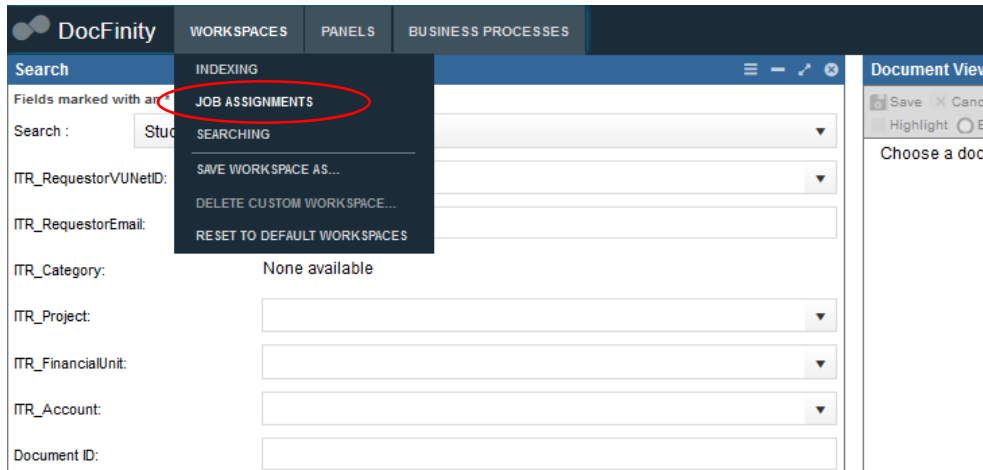
The new item type will be created by the Office of Student Accounts once the request has been properly approved. An email notification will be sent to the requestor with the new item type number when it is available for use.

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

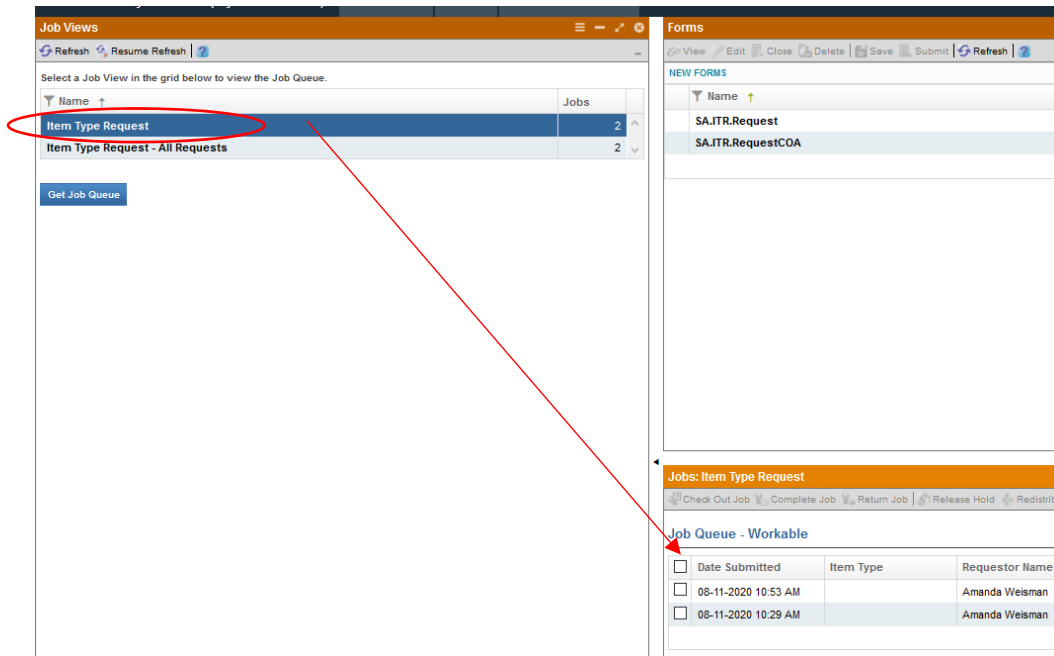
Item Type Approval

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

The image shows two screenshots of a web application. The top screenshot is titled "View SA.ITR.Request - Step 1 - Forms" and displays the "Item Type Request" form. The "Requestor Information" section includes fields for Requestor Name (Amanda Weisman), Requestor Email Address (amanda.weisman@vanderbilt.edu), Requestor Work Phone Number (615-885-8837), Requestor Organization (School of Engineering), and Requestor Department (15000 - Engineering: Office of the Dean). The "Item Type Information" section includes Category (Tuition - FinAid Grad) and Item Type Description (Tuition Grad Award). A checkbox for "This is a financial aid item type" is checked. The bottom screenshot is titled "Jobs: Item Type Request" and shows a "Tasks" section with a table of tasks to be completed. The tasks are: "View item type request form" (checked), "Approve or deny item type request" (unchecked), and "I have reviewed my response and am ready to submit." (unchecked). To the right of the tasks is a "JOB PROPERTIES" section with a table of job properties and information.

Property	Value
Date Submitted	08-11-2020 10:53 AM
Item Type	
Requestor Name	Amanda Weisman
Requestor Department	15000 - Engineering: Office of the Dean
Entity	
Financial Unit	

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.

The image shows a screenshot of the "Jobs: Item Type Request" web interface. The "Tasks" section is highlighted, showing a table of tasks to be completed. The tasks are: "View item type request form" (checked), "Approve or deny item type request" (unchecked), and "I have reviewed my response and am ready to submit." (unchecked).

Complete	Task description
<input checked="" type="checkbox"/>	* View item type request form
<input type="checkbox"/>	* Approve or deny item type request
<input type="checkbox"/>	* I have reviewed my response and am ready to submit.