

Vanderbilt University Office of Student Accounts

Item Type Request Procedure Manual

Last Updated:
3-13-2023

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

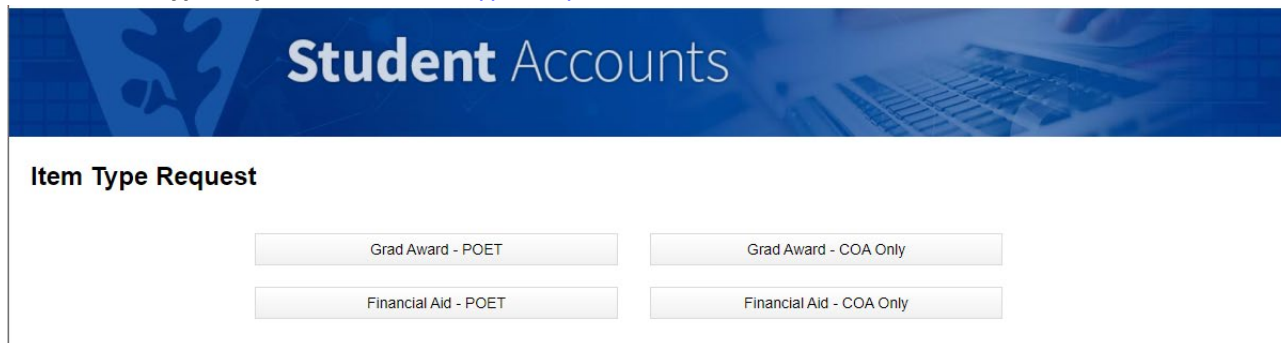
Requestors – PeopleSoft Queries to prevent duplicate requests; [Access Form](#)

Item Type Request Form

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

VU_SF_ITEM_TYPES_COA_POET

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.

For item types to be processed via the Prize/Award/UG Stipend form, 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. When deciding on the item type description for a financial aid item type, please keep in mind:

- The award recipient will be seeing the description on their financial aid award and on their student account.
- Keep the name as generic as possible to allow for the item type to be used for any and all awards that may be paid from one funding source (e.g. The Chemistry department pays three awards, the Star Award, The John Doe Award and The Jane Doe Awards which are all funded by the same COA, one item type can be used for all of these awards and the description can be Chemistry Department Award).
- The character limit is 30.
- If it is a scholarship or award that may pay any type of charge on the account, do not use specific charges in the description, such as XYZ Tuition Scholarship.

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="Carol Morrison"/> | <input type="text" value="carol.morrison@vanderbilt.edu"/> | <input type="text"/> |
| * Requestor Organization | * Requestor Department | |
| <input type="text" value="College of Arts & Science"/> | <input type="text" value="12000 - Arts and Science: Office of the Dean"/> | |

Item Type Information

| | |
|--|---|
| * Category | * Item Type Description |
| <input type="text" value="Tuition - FinAid Grad"/> | <input type="text" value="GRAD TUITION 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="600131"/> | <input type="text" value="12540"/> | <input type="text" value="FAidTG - Financial Aid - Graduate Tuition"/> | <input type="text" value="1 - Grants Task"/> |

COA Information

| | | | |
|----------------------------------|---|--|-----------------------------------|
| * Entity | * NAC | * Financial Unit | * Account |
| <input type="text" value="125"/> | <input type="text" value="15 - Sponsored Contracts and"/> | <input type="text" value="12540 - Mathematics"/> | <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

Item Type Request

Requestor Information

| | | |
|--------------------------|---|-------------------------------|
| * Requestor Name | * Requestor Email Address | * Requestor Work Phone Number |
| Carol Morrison | carol.morrison@vanderbilt.edu | 6153436779 |
| * Requestor Organization | * Requestor Department | |
| School of Engineering | 15000 - Engineering: Office of the Dean | |

Item Type Information

| | |
|-----------------------------------|-------------------------|
| * Category | * Item Type Description |
| Insurance - Grad | GRAD INSURANCE AWARD |
| This is a financial aid item type | Comments |
| No | |

COA Information

| | | | |
|-----------|---------------------------|---------------------------|-----------|
| * Entity | * NAC | * Financial Unit | * Account |
| 150 | 05 - General Unrestricted | 15230 - Civil Engineering | 1211 |
| * Program | * Activity | | |
| 000 | 000 | | |

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

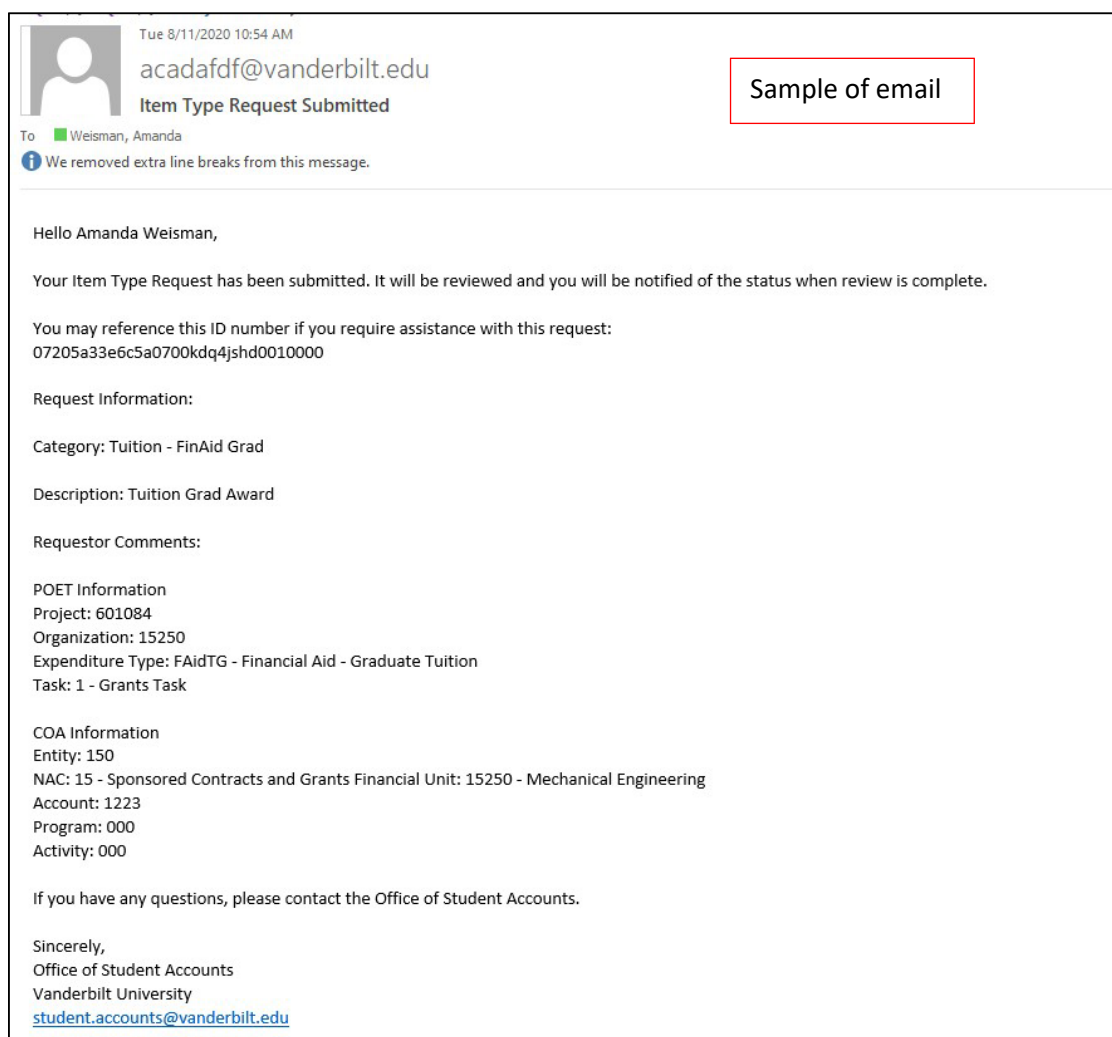
Submit Request

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.

| Forms |
|---|
| View Edit Close Delete Save Sub |
| SA.ITR.Request |
| SA.ITR.Request.GradAward |
| SA.ITR.RequestCOA |
| SA.ITR.RequestCOA.GradAward |

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.

| Forms |
|---|
| View Edit Close Delete Save Sub |
| SA.ITR.Request |
| SA.ITR.Request.GradAward |
| SA.ITR.RequestCOA |
| SA.ITR.RequestCOA.GradAward |



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

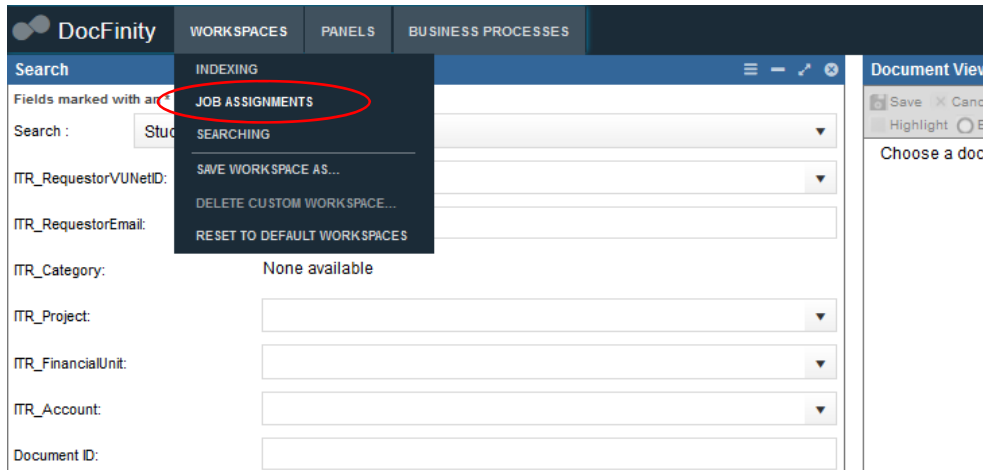
The new item type will be created by the Office of Student Accounts once the request has been properly approved. An email notification will be sent to the requestor with the new item type number when it is available for use.

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

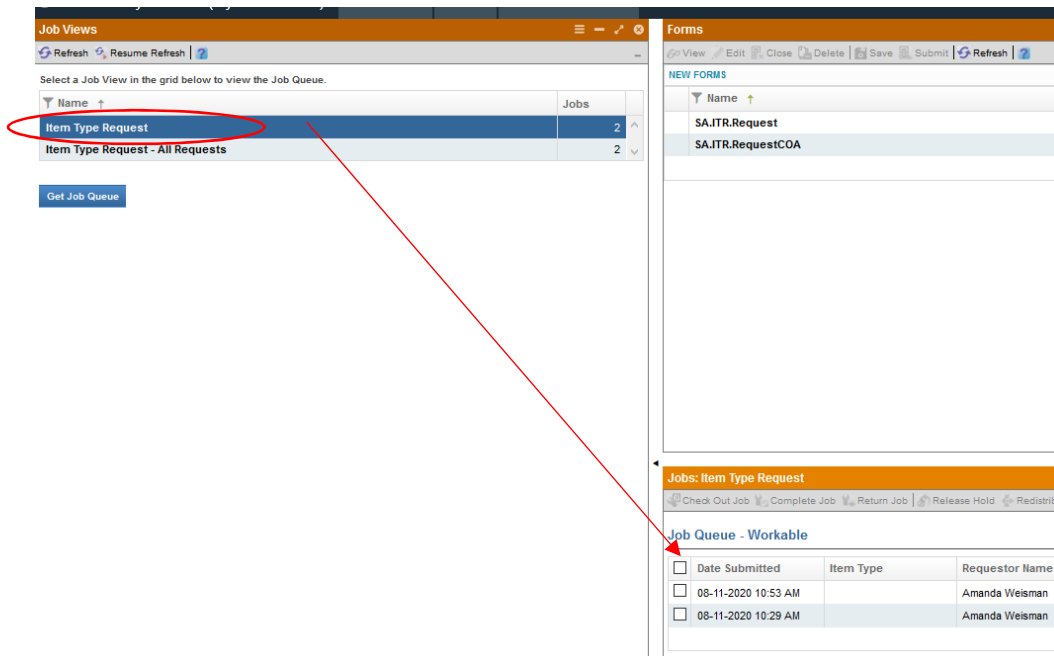
Click this link [DF PROD SSO](#) to approve requests for new item types.

Click on WORKSPACES, then JOB ASSIGNMENTS



The screenshot shows the DocFinity application interface. The top navigation bar includes 'WORKSPACES', 'PANELS', and 'BUSINESS PROCESSES'. A dropdown menu is open under 'WORKSPACES', showing options: 'INDEXING', 'JOB ASSIGNMENTS' (circled in red), 'SEARCHING', 'SAVE WORKSPACE AS...', 'DELETE CUSTOM WORKSPACE...', and 'RESET TO DEFAULT WORKSPACES'. Below the menu, there are search fields for 'ITR_RequestorVUNetID:', 'ITR_RequestorEmail:', 'ITR_Category:' (showing 'None available'), 'ITR_Project:', 'ITR_FinancialUnit:', 'ITR_Account:', and 'Document ID:'.

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.



The screenshot shows the DocFinity application interface with two main sections: 'Job Views' and 'Forms'.

Job Views: A table with columns 'Name' and 'Jobs'. The first row is 'Item Type Request' with 2 jobs, circled in red. The second row is 'Item Type Request - All Requests' with 2 jobs. A 'Get Job Queue' button is below the table.

Forms: A section titled 'NEW FORMS' with a table listing 'SA.ITR.Request' and 'SA.ITR.RequestCOA'. Below this, there is a section titled 'Jobs: Item Type Request' with a 'Job Queue - Workable' table.

Job Queue - Workable: A table with columns 'Date Submitted', 'Item Type', and 'Requestor Name'. It contains two rows of data:

| Date Submitted | Item Type | Requestor Name |
|---------------------|-----------|----------------|
| 08-11-2020 10:53 AM | | Amanda Weisman |
| 08-11-2020 10:29 AM | | Amanda Weisman |

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

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: School of Engineering
 * Requestor Department: 15000 - Engineering: Office of the Dean

Item Type Information

* Category: Tuition - FinAid Grad
 * Item Type Description: Tuition Grad Award

This is a financial aid item type: No
 Comments:

Jobs: Item Type Request

Tasks

Work through the tasks for this job. When all required tasks (*) are complete, the job can be completed; otherwise, you can return the job.

| 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. |

JOB PROPERTIES

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.

Jobs: Item Type Request

Tasks

Work through the tasks for this job. When all required tasks (*) are complete, the job can be completed; otherwise, you can return the job.

| 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. |