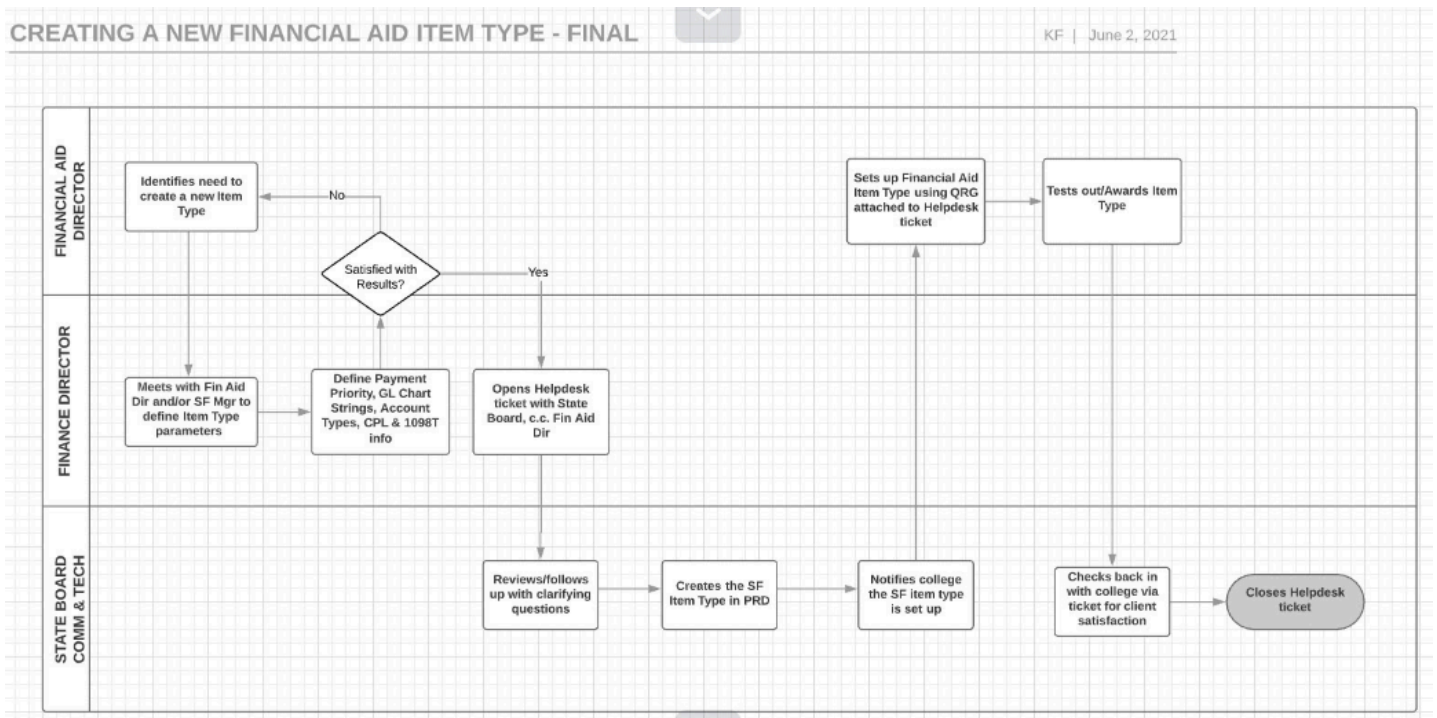


9.2 Steps to Creating a New Financial Aid Item Type

Purpose: Use this document as a reference on the flow of how new Item Types are created.

Audience: Financial Aid Staff, Finance/Student Financials Staff

i The below swim lane chart shows in what order and responsibility creating a new financial aid item type occurs. Note, these steps will depend on your role(s) at the college, staffing and your internal business flow.



Legend

Input or Output

Task or Action

Decision

(College FA) Step 1:

Usually, Financial Aid is the initiating department to request a new Item Type. For example, sometimes a new scholarship item type is needed, or a new grant through the college's Foundation needs to be built into an Item Type. The Financial Aid Director should initiate a meeting with Finance and/or Student Financials to define the Item Type parameters. The Solar Winds Ticket can be opened by FA Director or any designee.



Unless the funds are coming down from the federal level (i.e., HERFF, CARES) Financial Aid is typically the initiating department for Item Types. If the funds are coming down from the Federal level, typically, these are initiated by State Board and communicated to the colleges when they are built.

(College FIN/SF) Step 2:

The Solar Winds Ticketing System will auto-reply with spreadsheet to the ticket-submitter. Solar Winds will immediately auto reply with instructions & attached spreadsheet to complete (no longer PDF.) The attached spreadsheet should be completed, saved, and attached to a new tech note.

The Finance/SF Director(s) and Financial Aid Director need to define: Payment Priority, GL Chartstrings, Account Types (Debit, Credit), Charge Priority Lists, and box 5 1098-T information.

Once this information is defined, and approved by both Finance/SF Director(s) and the Financial Aid Director, FIN/SF opens a SBCTC Helpdesk ticket, and completes the Item Type form that is attached in the SBCTC Helpdesk ticket.

(SBCTC) Step 3:

State Board Functional Team(s) receive the Financial Aid Item Type request ticket, and reviews.

SBCTC may reach back out to the client to request clarifying information. Once SBCTC Functional Team is satisfied with the request, the Item Type is created on the Student Financials Item Type configuration page. SBCTC then notifies the college the Item Type has been created.

(College FA) Step 4:

Once the college receives updates in the SBCTC Helpdesk ticket that the Item Type has been created, college FA staff can create the Item Type in the Financial Aid Item Type configuration page. Once satisfied with the creation of the Financial Aid Item Type, then reach back out to SBCTC to close out the ticket.

(SBCTC) Step 5:

SBCTC then closes out the Helpdesk ticket.