9.2 Creating a New FA Item Type

Purpose: Use this document as a reference for creating a new FA item type in ctcLink.

Audience: FA Director.

⚠ You must have at least one of these local college managed security roles:

- ZC FA Local Configuration
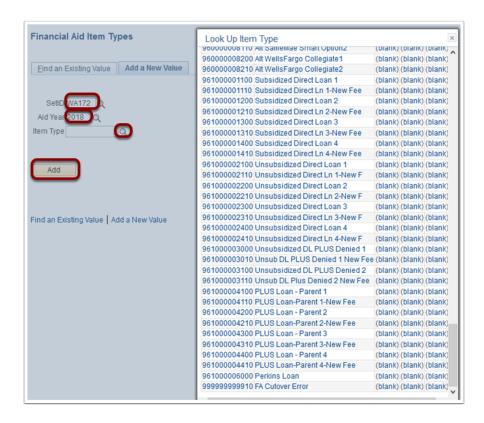- ZD FA Local Configuration
- ZD SACR Financial Aid Config

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.
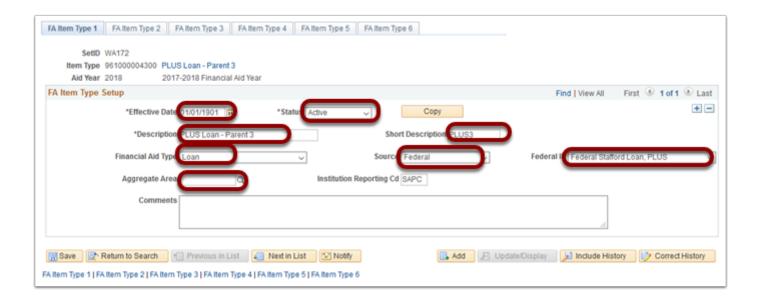
Creating a New FA Item Type

Financial Aid Item Types

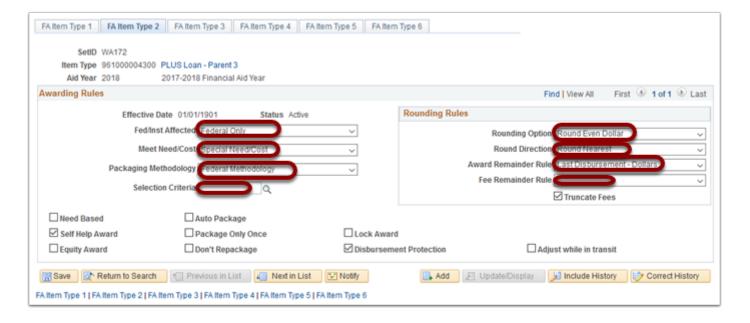**Navigation: NavBar > Navigator > Set Up SACR > Product Related > Financial Aid > Awards > Financial Aid Item Types**

1. The Financial Aid Item Types search page displays.
2. Select the **Add a New Value** tab.

⚠ **Note:** The FA office determines the FA Item Type code and name to submit to Student Financials. (See the **Item Type** QRG for correct numbering of item types.) Student Financials completes the setup prior to use by FA.

3. Enter the appropriate institution code in the **SetID** field.
4. Enter the year in the **Aid Year** field.
5. Select the **Item Type** look-up icon and select the appropriate item type.
6. Select the **Add** button.

7. The FA Item Type page displays.
8. Populate the following fields in the **FA Item Type 1** tab:
    1. **Effective Date** – enter date of Item Type creation (if a new Item Type, the recommended date to use is 01/01/1901)
    2. **Status** – Active
    3. **Description** – enter a description of the Item Type
    4. **Short Description** – enter a short description of the Item Type
    5. **Financial Aid Type** – select the appropriate type of aid
    6. **Source** – select the appropriate source
    7. **Federal ID** – select the appropriate option (federal item types only)
    8. **Aggregate Area** – select the appropriate option (federal item types only
    9. **Institution Reporting Cd** - enter SAPC if you are using this Item Type for SAP Communications
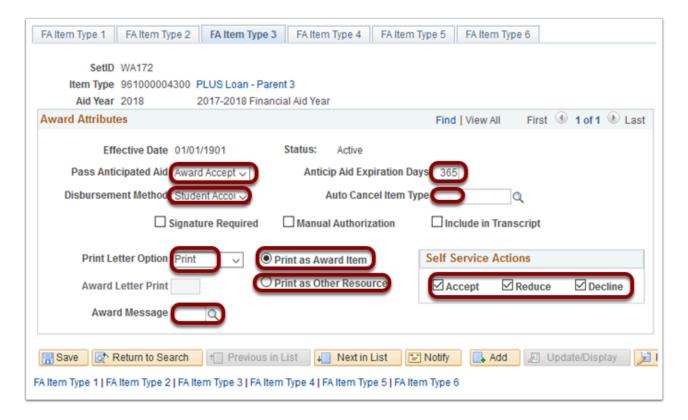
9. Select the FA Item Type 2 tab.
10. Populate the following fields in the Awarding Rules section:
    1. **Fed/Inst Affected** – select **Federal Only**
    2. **Meet Need/Cost** – select appropriate Need/Cost
    3. **Packaging Methodology** – select **Federal Methodology**
    4. **Selection Criteria** – leave this field blank

11. In the **Rounding Rules** section populate the following fields:
    1. **Rounding Option** – select **Round Even Dollar**
    2. **Round Direction** – select **Round Nearest**
    3. **Award Remainder Rule** – select **Last Disbursement - Dollars**
    4. **Fee Remainder Rule** – leave this field blank

12. The check boxes will be checked according to the type of award being created.
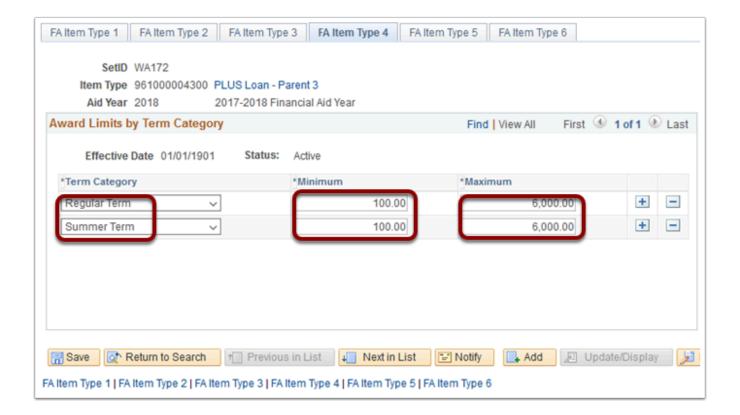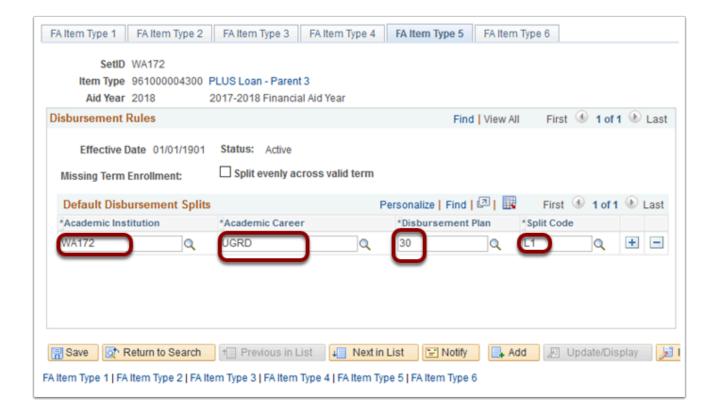

13. Select the FA Item Type 3 tab.

14. Populate the following fields:
    1. **Pass Anticipated Aid** – select the appropriate status
    2. **Anticip Aid Expiration Days** – enter **365**
    3. **Disbursement Method** – select the appropriate method
    4. **Auto Cancel Item type** – leave this field blank

15. Check the boxes as desired for the Item Type being created.
    1. **Print Letter Option** – select Print from the drop-down menu
    2. Select the **Print as Award Item** radio button
    3. Leave **Print as Other Resource** unchecked
    4. **Award Message** - select desired code or leave the field blank

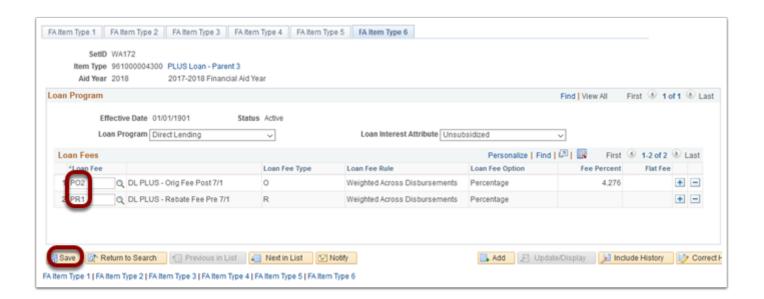16. **Self Service Actions** – check the appropriate check boxes required for the Item Type.

17. Select the FA Item Type 4 tab.
18. Populate the following fields:
    1. **Term Category** – select the desired term (for more than one Term Category, insert a new row)
    2. **Minimum** – enter the minimum dollar amount for the Item Type
    3. **Maximum** – enter the maximum dollar amount for the Item Type
    4. Add a new row **(+)** for additional **Term Categories if needed**

| FA Item Type 1 | FA Item Type 2 | FA Item Type 3 | FA Item Type 4 | FA Item Type 5 | FA Item Type 6 |

SetID WA172
Item Type 961000004300 PLUS Loan - Parent 3
Aid Year 2018   2017-2018 Financial Aid Year

Award Limits by Term Category   Find | View All   First ◄ 1 of 1 ► Last

Effective Date 01/01/1901   Status: Active

*Term Category		*Minimum	*Maximum		
Regular Term	∨	100.00	6,000.00	+	−
Summer Term	∨	100.00	6,000.00	+	−

🖫 Save   ⟳ Return to Search   ↑🖿 Previous in List   ↓🖿 Next in List   ✉ Notify   🖿 Add   🗐 Update/Display   🔁

FA Item Type 1 | FA Item Type 2 | FA Item Type 3 | FA Item Type 4 | FA Item Type 5 | FA Item Type 6

19. Select the FA Item Type 5 tab.
20. Populate the following fields:
    1. **Academic Institution** –select the institution
    2. **Academic Career** –select **UGRD**
    3. **Disbursement Plan** – select a disbursement plan
    4. **Split Code** – select the appropriate split code

21. Select the FA Item Type 6 tab.
22. Populate the following fields:
    1. **Loan Fee** – select the appropriate loan fee codes

23. Select the **Save** button.

> ❗ **Please Note** – Rebate value MUST be included, even if it's zero when, setting up the Loan Fees.

> ⚠ **Please Note** – Remember to make sure you update the College Financing Plan for the item type if applicable. Nav to College Financing Plan: Nav Bar > Navigator > Set Up SACR > Product Related > Financial Aid > College Financing Plan
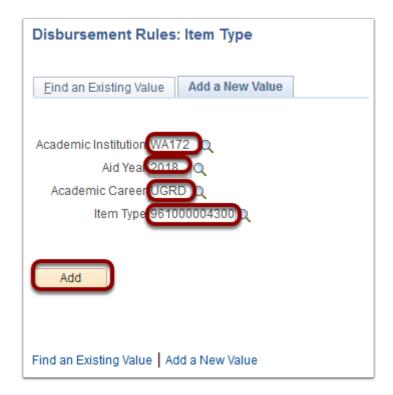
24. Section complete.

> ⚠ You must have at least one of these local college managed security roles:
>
> • ZC FA Local Configuration
> • ZD FA Local Configuration
> • ZD SACR Financial Aid Config
>
>   If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.
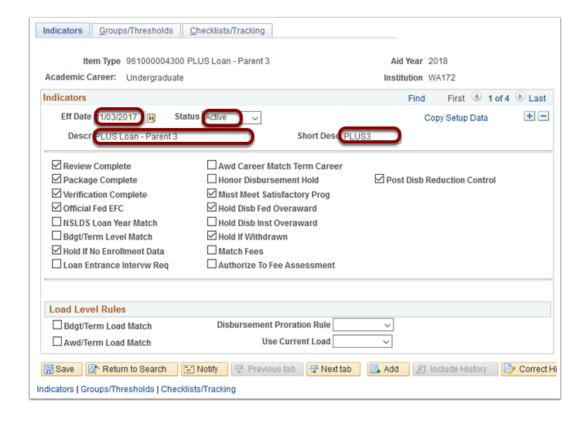
Define Item Type Rules

Navigation: NavBar > Navigator > Set Up SACR > Product Related > Financial Aid > Disbursement > Define Item Type Rules
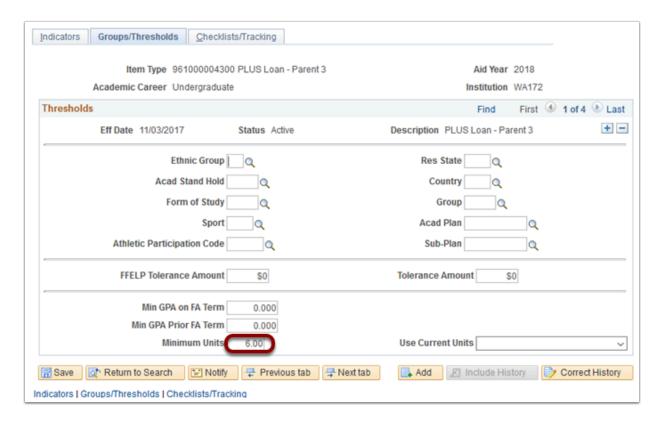
1. The Disbursement Rules: Item Type search page displays.
2. Select the **Add a New Value** tab.
3. Select the **Academic Institution**.
4. Select the **Aid Year**.
5. **Academic Career**:
6. Select **UGRD**.
7. Select the appropriate **Item Type**.
8. Select the **Add** button.

Disbursement Rules: Item Type

Find an Existing Value | Add a New Value

Academic Institution WA172
Aid Year 2018
Academic Career UGRD
Item Type 961000004300

Add

Find an Existing Value | Add a New Value

9. The Disbursement Rules: Item Type page displays.
10. Populate the following fields in the **Indicators** tab:
    1. **Eff Date** – enter date of Item Type creation (if a new Item Type, the recommended date to use is 01/01/1901. If making an adjustment to an existing Item Type Disbursement Rule, use the suggested Eff Date of 01/01/20xx, xx = the AY year in which you are making the change)
    2. **Status** – select Active
    3. **Descr** – populated with description for the Item Type selected
    4. **Short Desc** – populated with Short Description for the Item Type selected
    5. Check the appropriate check boxes for the **Item Type** rules.
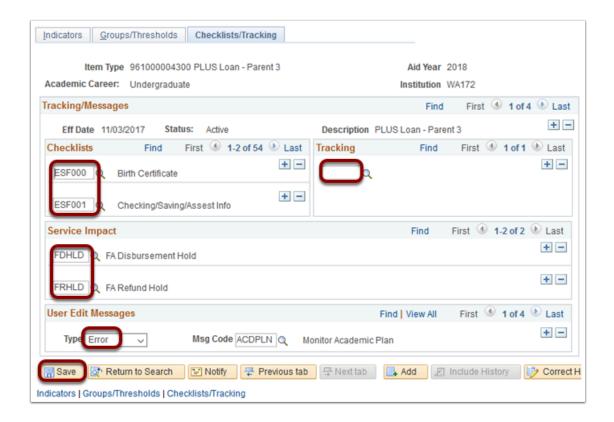
11.   Select the Groups/Thresholds tab.
12.   Populate the following fields:
    1.   Enter the **Minimum Units** required for the Item Type, if applicable.
    2.   Populate Other fields as needed for the Item Type rules.

13.   Select the Checklists/Tracking tab.

14. Populate the following fields:
    1. **Checklists** – select the desired checklist (Select the Add a New Row **(+)** button for multiple checklists)
    2. **Tracking** – leave blank
    3. **Service Impact** – select the **Service Indicator** codes
    4. **User Edit Messages** – select the appropriate **Message Code**
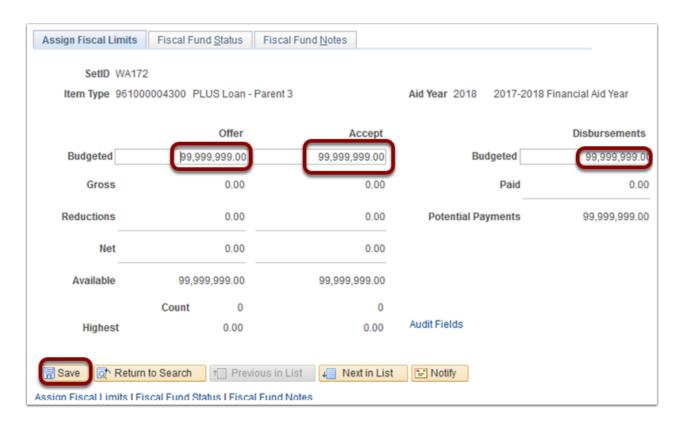
15. Select the **Save** button.

16. Section complete.

Fiscal Item Types

> ❗ You must have at least one of these local college managed security roles:
>
> - ZC FA Local Configuration
> - ZD FA Local Configuration
> - ZD SACR Financial Aid Config
>
>   If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: NavBar > Navigator > Set Up SACR > Product Related > Financial Aid > Awards > Fiscal Item Types

1. The Fiscal Item Types search page displays.
2. Select the **SetID** lookup icon and select the appropriate code.
3. Select the **Aid Year** lookup icon and select the year.
4. Select the **Item Type** lookup icon and select the appropriate item type.
5. Select the **Search** button.
6. The Assign Fiscal Limits tab displays.
7. Enter the Budgeted amounts into the **Offer**, **Accept** and **Disbursement** fields.
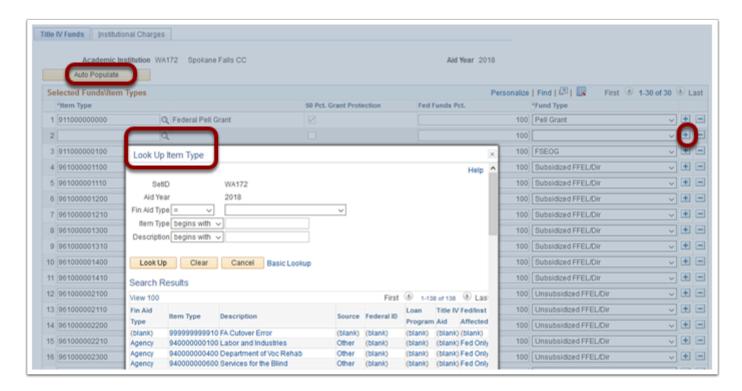8. Select the **Save** button.

9. Section complete.

Define Rules for Return

❗ You must have at least one of these local college managed security roles:

- ZC FA Local Configuration
- ZD FA Local Configuration
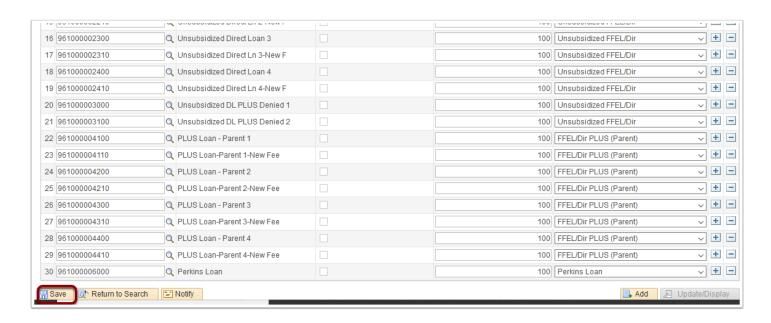- ZD SACR Financial Aid Config

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: NavBar > Navigator > Set Up SACR > Product Related > Financial Aid > Application Processing > Define Rules for Return

1. The Define Rules for Return search page displays.
2. Enter the **Institution**.
3. Enter the **Aid Year**.
4. Select **Search**.
5. The Title IV Funds tab displays.
6. Insert a new row by selecting **(+)** button to add the newly created Federal item type.
7. Select the **Item Type** look-up icon and select the appropriate item type.
8. A user can also select the Auto Populate button to add the Federal item type.
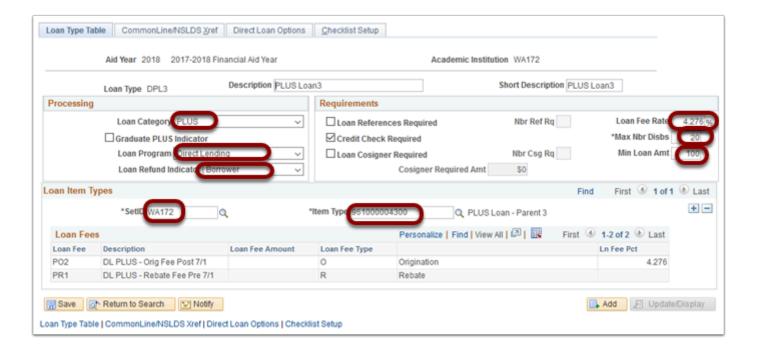

9. Select the **Save** button.

10. Section complete.

Create Loan Types

> ⊗ ***This section is for New Loan Item Types only***.

> ⊗ You must have at least one of these local college managed security roles:
>
> - ZC FA Local Configuration
> - ZD FA Local Configuration
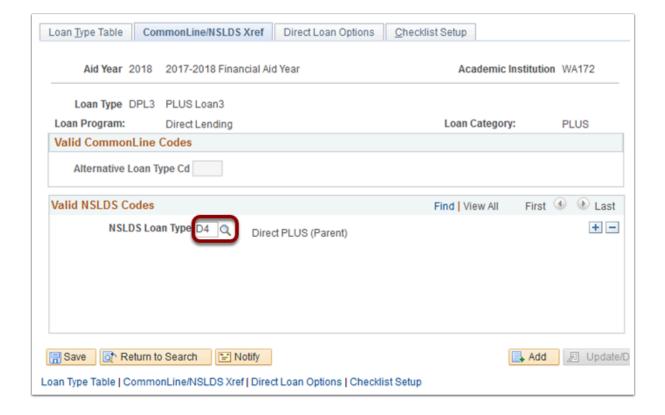> - ZD SACR Financial Aid Config
>
>   If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: NavBar > Navigator > Set Up SACR > Product Related > Financial Aid > Loans > Create Loan Types

1. Select the **Add a New Value** tab.
2. Select the **Academic Institution**.
3. Select the **Aid Year**.
4. Enter the appropriate **Loan Type Cd**.
5. Select **Search**.
6. The Loan Type Table tab displays.
7. Populate the following fields in the **Loan Type Table** tab:
   1. Select the **Loan Category**
   2. Select the **Loan Program**
   3. Select the **Loan Refund Indicator**
   4. Enter the **Loan Fee Rate**
   5. Enter the **Max Nbr Disbs** (disbursements)
   6. Enter the **Min Loan Amt**
   7. **SetID –** enter the institution code
   8. **Item Type** – enter the Item Type associated with the Loan Type being created
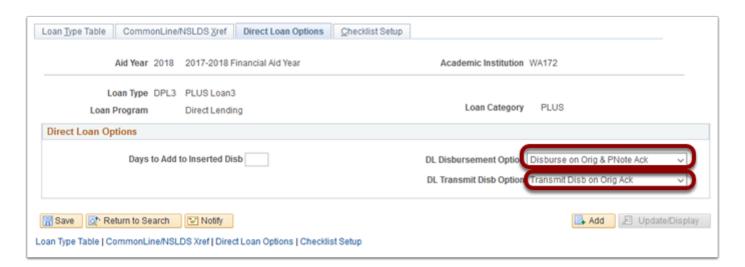
8. Select the CommonLine/NSLDS Xref tab.
9. Populate the following fields:
    1. **NSLDS Loan Type** – Select the lookup icon and select the appropriate code

10. Select the Direct Loan Options tab.
11. Populate the following fields:
    1. **DL Disbursement Option –** Select **Disburse on Orig & PNote Ack** from the drop-down menu

2. **DL Transmit Disb Option** – Select **Transmit Disb on Orig Ack** from the drop-down menu

12. Select the Checklist Setup tab.
13. Populate the following fields:
    1. **Checklist** – SBCTC has not configured the checklist field at this time

14. Process complete.