

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.

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

FA Item Type Setup Find | View All First 1 of 1 Last

*Effective Date 01/01/1901 *Status Active Copy

*Description PLUS Loan - Parent 3 Short Description PLUS3

Financial Aid Type Loan Source Federal Federal Stafford Loan, PLUS

Aggregate Area Institution Reporting Cd SAPC

Comments

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

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

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.

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

Awarding Rules Find | View All First 1 of 1 Last

Effective Date 01/01/1901 Status Active

Fed/Inst Affected Federal Only

Meet Need/Cost Special Need/Cost

Packaging Methodology Federal Methodology

Selection Criteria

☐ Need Based ☐ Auto Package ☐ Lock Award ☒ Disbursement Protection ☐ Adjust while in transit

☒ Self Help Award ☐ Package Only Once

☐ Equity Award ☐ Don't Repackage

Rounding Rules

Rounding Option Round Even Dollar

Round Direction Round Nearest

Award Remainder Rule Last Disbursement - Dollars

Fee Remainder Rule

☒ Truncate Fees

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

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

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.

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

Award Attributes Find | View All First 1 of 1 Last

Effective Date 01/01/1901 Status: Active

Pass Anticipated Aid **Award Accept** Anticip Aid Expiration Days **365**

Disbursement Method **Student Accor** Auto Cancel Item Type

☐ Signature Required ☐ Manual Authorization ☐ Include in Transcript

Print Letter Option **Print** ☒ **Print as Award Item**

Award Letter Print ☐ **Print as Other Resource**

Award Message

Self Service Actions

☒ **Accept** ☒ **Reduce** ☒ **Decline**

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

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

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

Disbursement Rules Find | View All First 1 of 1 Last

Effective Date 01/01/1901 Status: Active

Missing Term Enrollment: ☐ Split evenly across valid term

Default Disbursement Splits Personalize | Find | First 1 of 1 Last

*Academic Institution	*Academic Career	*Disbursement Plan	*Split Code
WA172	UGRD	30	L1

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

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.

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

Loan Program Find | View All First 1 of 1 Last

Effective Date 01/01/1901 Status Active

Loan Program Direct Lending Loan Interest Attribute Unsubsidized

Loan Fees Personalize | Find | First 1-2 of 2 Last

*Loan Fee	Loan Fee Type	Loan Fee Rule	Loan Fee Option	Fee Percent	Flat Fee
PO2	O	DL PLUS - Orig Fee Post 7/1	Percentage	4.275	
PR1	R	DL PLUS - Rebate Fee Pre 7/1	Percentage		

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct

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

! 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

Aid Year

Academic Career

Item Type

[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.

Indicators Groups/Thresholds Checklists/Tracking

Item Type 961000004300 PLUS Loan - Parent 3 Aid Year 2018
Academic Career: Undergraduate Institution WA172

Indicators Find First 1 of 4 Last

Eff Date 1/03/2017 Status Active Copy Setup Data

Descr PLUS Loan - Parent 3 Short Desc PLUS3

<input checked="" type="checkbox"/> Review Complete	<input type="checkbox"/> Awd Career Match Term Career	<input checked="" type="checkbox"/> Post Disb Reduction Control
<input checked="" type="checkbox"/> Package Complete	<input type="checkbox"/> Honor Disbursement Hold	
<input checked="" type="checkbox"/> Verification Complete	<input checked="" type="checkbox"/> Must Meet Satisfactory Prog	
<input checked="" type="checkbox"/> Official Fed EFC	<input checked="" type="checkbox"/> Hold Disb Fed Overaward	
<input type="checkbox"/> NSLDS Loan Year Match	<input type="checkbox"/> Hold Disb Inst Overaward	
<input type="checkbox"/> Bdgt/Term Level Match	<input checked="" type="checkbox"/> Hold If Withdrawn	
<input checked="" type="checkbox"/> Hold If No Enrollment Data	<input type="checkbox"/> Match Fees	
<input type="checkbox"/> Loan Entrance Intervw Req	<input type="checkbox"/> Authorize To Fee Assessment	

Load Level Rules

☐ Bdgt/Term Load Match Disbursement Proration Rule

☐ Awd/Term Load Match Use Current Load

Save Return to Search Notify Previous tab Next tab Add Include History Correct Hi

Indicators | Groups/Thresholds | Checklists/Tracking

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.

Indicators Groups/Thresholds Checklists/Tracking

Item Type 961000004300 PLUS Loan - Parent 3 Aid Year 2018
Academic Career Undergraduate Institution WA172

Thresholds Find First 1 of 4 Last

Eff Date 11/03/2017 Status Active Description PLUS Loan - Parent 3

Ethnic Group <input type="text"/>	Res State <input type="text"/>
Acad Stand Hold <input type="text"/>	Country <input type="text"/>
Form of Study <input type="text"/>	Group <input type="text"/>
Sport <input type="text"/>	Acad Plan <input type="text"/>
Athletic Participation Code <input type="text"/>	Sub-Plan <input type="text"/>

FFELP Tolerance Amount \$0 Tolerance Amount \$0

Min GPA on FA Term 0.000
Min GPA Prior FA Term 0.000
Minimum Units 6.00 Use Current Units

Save Return to Search Notify Previous tab Next tab Add Include History Correct History

Indicators | Groups/Thresholds | Checklists/Tracking

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.

The screenshot shows the 'Checklists/Tracking' tab in a financial aid system. At the top, there are tabs for 'Indicators', 'Groups/Thresholds', and 'Checklists/Tracking'. Below these, the 'Item Type' is '961000004300 PLUS Loan - Parent 3', 'Aid Year' is '2018', 'Academic Career' is 'Undergraduate', and 'Institution' is 'WA172'. The 'Tracking/Messages' section shows 'Eff Date' as '11/03/2017', 'Status' as 'Active', and 'Description' as 'PLUS Loan - Parent 3'. The 'Checklists' section lists 'ESF000' (Birth Certificate) and 'ESF001' (Checking/Saving/Assesst Info). The 'Tracking' section is empty. The 'Service Impact' section lists 'FDHLD' (FA Disbursement Hold) and 'FRHLD' (FA Refund Hold). The 'User Edit Messages' section shows 'Type' as 'Error' and 'Msg Code' as 'ACDPLN'. At the bottom, there is a 'Save' button and other navigation buttons.

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.

Assign Fiscal Limits | Fiscal Fund Status | Fiscal Fund Notes

SetID WA172

Item Type 961000004300 PLUS Loan - Parent 3

Aid Year 2018 2017-2018 Financial Aid Year

	Offer	Accept		Disbursements
Budgeted	99,999,999.00	99,999,999.00	Budgeted	99,999,999.00
Gross	0.00	0.00	Paid	0.00
Reductions	0.00	0.00	Potential Payments	99,999,999.00
Net	0.00	0.00		
Available	99,999,999.00	99,999,999.00		
Count	0	0		
Highest	0.00	0.00		

Audit Fields

Save | Return to Search | Previous in List | Next in List | Notify

Assign Fiscal Limits | Fiscal Fund Status | Fiscal Fund Notes

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.

The screenshot shows the 'Title IV Funds' tab in the 'Define Rules for Return' search page. The page displays a table of 'Selected Funds/Item Types' with columns for 'Item Type', 'Federal Pell Grant', '50 Pct. Grant Protection', 'Fed Funds Pct.', and 'Fund Type'. A 'Look Up Item Type' dialog box is open, showing search criteria for 'SetID' (WA172), 'Aid Year' (2018), and 'Item Type' (begins with). The dialog also displays search results for various item types. The 'Auto Populate' button is highlighted in the top left, and the '+' button in the 'Fund Type' column is highlighted in the top right.

9. Select the **Save** button.

The screenshot shows the bottom section of the 'Title IV Funds' tab. It displays a table of item types with columns for 'Item Type', 'Description', 'Source', 'Federal ID', 'Loan Program Aid', 'Title IV Fed/Inst Affected', and 'Fund Type'. The 'Save' button is highlighted in the bottom left corner.

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

Loan Type Table | CommonLine/NSLDS Xref | Direct Loan Options | Checklist Setup

Aid Year 2018 2017-2018 Financial Aid Year Academic Institution WA172

Loan Type DPL3 Description PLUS Loan3 Short Description PLUS Loan3

Processing

Loan Category: PLUS
☐ Graduate PLUS Indicator
 Loan Program: Direct Lending
 Loan Refund Indicator: Borrower

Requirements

☐ Loan References Required Nbr Ref Rq
☒ Credit Check Required
☐ Loan Cosigner Required Nbr Csg Rq
 Cosigner Required Amt \$0

Loan Fee Rate 4.276%
 *Max Nbr Disbs 20
 Min Loan Amt 100

Loan Item Types Find First 1 of 1 Last

*Settle WA172 *Item Type 051000004300 PLUS Loan - Parent 3

Loan Fees Personalize | Find | View All | First 1-2 of 2 Last

Loan Fee	Description	Loan Fee Amount	Loan Fee Type	Ln Fee Pct	
PO2	DL PLUS - Orig Fee Post 7/1		O	Origination	4.276
PR1	DL PLUS - Rebate Fee Pre 7/1		R	Rebate	

Save Return to Search Notify Add Update/Display

Loan Type Table | CommonLine/NSLDS Xref | Direct Loan Options | Checklist Setup

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

Loan Type Table | CommonLine/NSLDS Xref | Direct Loan Options | Checklist Setup

Aid Year 2018 2017-2018 Financial Aid Year Academic Institution WA172

Loan Type DPL3 PLUS Loan3

Loan Program: Direct Lending Loan Category: PLUS

Valid CommonLine Codes

Alternative Loan Type Cd

Valid NSLDS Codes Find | View All First Last

NSLDS Loan Type D4 Direct PLUS (Parent)

Save Return to Search Notify Add Update/D

Loan Type Table | CommonLine/NSLDS Xref | Direct Loan Options | Checklist Setup

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

The screenshot shows the 'Direct Loan Options' tab selected. The 'DL Transmit Disb Option' dropdown menu is highlighted with a red box and set to 'Transmit Disb on Orig Ack'. Other fields include 'Days to Add to Inserted Disb' (empty), 'DL Disbursement Option' (set to 'Disburse on Orig & PNote Ack'), 'Aid Year' (2018), 'Academic Institution' (WA172), 'Loan Type' (DPL3), 'Loan Program' (Direct Lending), and 'Loan Category' (PLUS). Buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display' are visible at the bottom.

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

The screenshot shows the 'Checklist Setup' tab selected. The 'Checklist' field is highlighted with a red box and is empty. Other fields include 'Aid Year' (2015), 'Academic Institution' (WA171), 'Loan Type' (DSB5), and 'Loan Program' (empty). The 'Loan Category' field is also empty. Buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display' are visible at the bottom.

14. Process complete.