

9.2 Updating Item Type Disbursement Rules

Purpose: Use this document as a reference on how to update the Disbursement Rules for your Item Types.

Audience: Financial Aid Staff.

! 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.

Updating Item Type Disbursement Rules

Indicators Tab

Navigation: Set Up SACR > Product Related > Financial Aid > Disbursement > Define Item Type Rules

1. At the **Disbursement Rules: Item Type Search Criteria** page, enter the:
 - **Academic Institution**
 - **Aid Year**
 - **Academic Career** = UGRD
 - **Item Type**
2. Select the **Search** button.
3. On the **Define Item Type Rules** page, at the **Indicators** tab, select the add a new row button -- this will create a new **Effective Date**.

! Note, adding a new row, the new **Effective Date** will default to the day you inserted the new row, i.e., today.

For example, if you retroactively awarded aid to the start of the aid year (summer term and beyond), and you made a change to this page in winter term of the current aid year, the change would not be reflected in disbursements prior to the start of winter.


As a result, you would be able to disburse winter, but not summer, or fall because of the effective date.

It is recommended you change the **Effective Date** to a date at the beginning of the Aid Year so as to avoid more Authorization Failure messages.

i.e., if you are making a change for the 2023/2024 AY, make the **Effective Date** 01/01/2023.

4. Next, change the effective date to a date in the beginning of the aid year. In the image below, the 07/01/2020 date is used.
5. Check or uncheck whichever **Disbursement Rule Indicator** checkboxes you want applied to this aid in this aid year. In this example, the **Official Fed EFC** will be unchecked, as this Item Type in this scenario will be intended for merit based aid, and EFC will not be necessary to disburse the award.
6. Select **Save**.

Groups/Thresholds Tab


-  At the **Groups/Thresholds** tab, you can select Thresholds and Groups to be able to control the type of aid that can be disbursed to a student.

For example, if you were setting Thresholds on an Athletic Scholarship, and you wanted to ensure an Athletic Scholarship did not disburse unless the student awarded that Item Type was officially "Recruited", you could define that in the Athletic Participation Code.

Additionally, if you wanted to ensure this award did not disburse on anyone except basketball recruits, you could define that in the Sport field.

Note: [the image below is just a scenario example.](#)

Checklists/Tracking Tab

 In the **Checklists/Tracking** tab, you can define checklist holds with Service Impacts, set User Edit Messages with holds, and also track by specific Tracking Groups.

For example, if you want to set a checklist for a foundation or outside scholarship that they student must sign a letter of condition as part of receiving the scholarship, you could create a checklist for that, and list it here in the rules that it must be completed before the scholarship is able to be disbursed.

Note in the example below, the Service Impact of DisbHold for Less Than FT is selected. This means the scholarship will not disburse if the student is assigned a Service Indicator with Service Impact DisbHold for Less than FT.

Similarly, you can set User Edit Messages (UEMs) to your Item Types, which means if you have a User Edit Message with a Service Impact of Disb Hold on it, it would be another way to prevent Disbursement from running until that UEM is Resolved.

Lastly, in the Tracking group box, you can define certain Tracking Groups must be met in order to Disburse. For example, if this Item Type was a military scholarship, you could define that the Tracking Group of Military Info is selected.

Note: [the image below is just a scenario example.](#)

Video Tutorial

The video below demonstrates the process actions described in steps listed above. There is no audio included with this video. Select the play button to start the video.

Video Tutorial via Panopto

View the link to [Updating Item Type Disbursement Rules](#). This link will open in a new tab/window.