Is this a new or existing item type:

Approval by the Student Financials Manager or Finance Director:

Finance Approval*:   Email: Telephone:

Financial Aid Approval**:   Email: Telephone:

** If a new financial aid item type is requested, please adhere to the financial aid item type naming convention. Financial Aid item types must be approved by the financial aid director. **Please verify the effective date** for any financial aid item types with your financial aid office to determine when they plan to use it for the various aid years.

Information about the Item Type:

Business Unit: Effective Date:

Title for New Item Type: Short Description:

Suggested number: Refundable:

Item Type Classification: 1098T Eligible××:

Charge Priority List: Pymt Overall Priority:

Payment Priority Num: Account Types:

Conversion	Tuition
Mandatory Fees	Payment Plan
Miscellaneous Fees	Third Party

×× If the new item type is a charge classification and should be in box 1, please select **Box 1 Charge.** If the new item type is Financial Aid or a Third Party Payment that should be in box 5, please select **Box 5 FA/TP.** Otherwise, please leave the field blank.

General Ledger Information: If Multiple percentages are needed, please attach a separate spreadsheet, with the appropriate chartfield information, to the ticket.

Second Journal Set: If a second journal set is needed, please navigate to the following page and use the same effective date as on the item type. Any questions on how to populate the second journal set, please let us know in the item type ticket.
Setup SACR> Product Related> Student Financials> CTC Custom> GL 2nd Journal Set Setup

	Operating Unit	Account	Fund	Class	Department	Program	Chartfield 2	Percentage
Debit								
Credit								

Comments: