

SECTION 1	Initial Set Up						
	Select Action: <input type="checkbox"/> New <input type="checkbox"/> Update <input type="checkbox"/> Change Chartfield Account						
	Implementation Term						
	Item Type						
	Description						
	Type Aid		<input type="checkbox"/> Grant <input type="checkbox"/> Scholarship <input type="checkbox"/> Loan <input type="checkbox"/> Workstudy				
	Scholarship Type*		<input type="checkbox"/> Restricted (TJxxx) <input type="checkbox"/> Unrestricted (TPxxx) <input type="checkbox"/> Agency (TQxxx)				
	Funding Source						
	Keywords*						
	IFT# (If Chancellors Office is selected)						
	TAP/PF Account # (If TAP/PF or ASI is selected)						
	CFS Fund (If State Funds is selected)						
	Item Type Classification						
SECTION 2	Amrt Edits	1098T Eligible?				<input type="checkbox"/> Yes <input type="checkbox"/> No	
SECTION 3	Misc	Change Priority List				<input type="checkbox"/> FAFEES <input type="checkbox"/> FANOCF <input type="checkbox"/> FAPRIOR <input type="checkbox"/> FASUF <input type="checkbox"/> FASUG	
SECTION 4	Amrt Edits	Refundable Indicator				<input type="checkbox"/> Yes <input type="checkbox"/> No	
SECTION 5	Miscellaneous Account Type	Pick Up Receivable from Charge		<input type="checkbox"/> Yes <input type="checkbox"/> No			
		Payment Priority #					
		What fees can this award pay? (FEE, HOU, MISC, XSS, etc.)					
		What term can this award pay for?					
SECTION 6	Accounting Services	GL Interface	Debit	(Account)	(Fund Code)	(Department)	(Program Code)
			Credit	(Account)	(Fund Code)	(Department)	(Program Code)
SECTION 7	Financial Aid Approval	FA Name					
		FA Signature				Date	
		Comments					
SECTION 8	Accounting Services Approval	AS Name					
		AS Signature				Date	
		Comments					
SECTION 9	SFS Approval	SFS Name					
		SFS Signature				Date	
		Comments					

## Item Type Request Form Instructions

- Please complete sections 1, 2, 3, 4, and 5
- After completing the form, please submit through Adobe for signatures/additional information. The following individuals are required to sign:
  - i. Accounting Services Manager (Section 6 & 8)
  - ii. Director or Associate Director of Financial Aid (Section 7)
  - iii. Student Financial Services Manager (Section 9)

\*Please work with the Director or Associate Director of Financial Aid to list the keywords associated with the Item Type.

\*If the Aid Type is a scholarship, one of the following sources must be selected:

**Restricted (TJxxx)** - This is used when the CSU receives monies specifically designated for scholarships by a donor or through operation of the law. In other words, if a grantor indicates that the funds may only be used for scholarships, the funds received are deemed to be restricted. This holds true even if the campus selects the recipient student or has the ability to redirect the grant or scholarship to a different student from one otherwise specified in the gift.

**Unrestricted (TPxxx)** - Scholarship monies are recorded in this fund if the revenue is from unrestricted, non-CSU sources. Unrestricted sources include donor monies where the purpose of the gift is not specified. Recipients of awards from this funding source will always be determined by the CSU. If the financial aid is from a CSU funded source, then the related activity should be recorded within the source fund.

**Agency (TQxxx)** - When a campus receives scholarship monies for which the scholarship recipients have been determined by another campus or by another grantor, the receiving campus is acting as an agent. Scholarship funds received from the California State University Foundation for the CSU Trustee Awards are also considered agency transactions.

For questions or concerns, please contact [sfs@csudh.edu](mailto:sfs@csudh.edu)