



NEW YORK UNIVERSITY

NYU Financial Aid Item Type Request Form: School Process

Background

The Financial Aid Item Type is required to award students in the Student Information System (SIS). Fiscal officers may request new financial aid item types or request a change to the description, the chartfield, and both for an existing item type.

Prior to this ServiceLink item type form implementation, item types were requested via e-mail to the Controller's Division — Accounting and Reporting group. The Accounting and Reporting group completed an online form, which was transmitted to the Office of Financial Aid for processing along with the Office of the Bursar and Sponsored Programs Administration when necessary.

This ServiceLink item type request form is solely for financial aid (scholarship and stipend) item types. Item types for all other categories will continue to be handled as is. Renewing funding amounts for financial aid awards will also continue to be handled as is.

Adding New School Administrators to the Process

The Office of the Bursar manages all access to this form. To request access to the financial aid item type form or to add recipients for notifications when the request is complete, please email Bursar – Data Integrity at sfdata@nyu.edu. Please include the following information: Administrator Name, N#, and NetID.

All Financial Aid Item Type Request

The Office of the Bursar manages all requests for access to this form.

You can access the [Financial Aid Item Request Form in ServiceLink](#).

All required fields should be completed before the form can be submitted. The red asterisk next to the field label indicates the required fields. Help text is also provided for most fields.

Validations included on the form:

- Chartfield segment validation

- Chartfield combination validation
- If applicable, project end date validation

An error message appears if there are missing chartfield segments, the chartfield combination is invalid and if the project is invalid. Please contact the Controller's Division - Accounting and Reporting group to validate new programs/projects, to validate new chartfield combinations, or otherwise troubleshoot these.

When a request is completed, requesters will receive a notification with a copy of the completed form.

Please contact Bursar - Data Integrity at sfdata@nyu.edu for any questions about completing the form for fields with no help text.

Requesting a New Financial Aid Item Type

The new item type request workflow routing is as follows:

- For funds 24, 25, 72, or 73, the request is routed to Sponsored Programs Administration (SPA) for review and approval. If approved, routed to the Office of Financial Aid (OFA), else a rejection notification sent to the requestor.
- The Office of Financial Aid (OFA) sets up the item type in the Student Information System (SIS) and appends disbursement rules to the item type. In parallel, the request is sent to the Office of the Bursar.
- The Office of the Bursar appends the chartfield information to the item type in the Student Information System.
- The requesters and awarders from schools receive notification via email with service link ticket # once the request is completed. This notification will include the new item type number, description, and funding amount.

Requesting a Financial Aid Item Type Change

Item type change request workflow routing is as follows:

Description Change Only

- For description changes, the request is routed to the Office of Financial Aid (OFA). OFA updates the description and completes the request.

- The requesters and awarders from schools receive notification via email with ServiceLink ticket number once the request is completed. This notification will include the item type number and the new description

Chartfield Change Only

- A chartfield change for funds 24, 25, 72, or 73, the request is routed to Sponsored Programs Administration (SPA) for review and approval. If approved, it is routed to the Office of the Bursar, else a rejection notification is sent to the requester.
- A chartfield change for all other funds is routed to the Office of the Bursar. This office appends the new chartfield information to the item type in the Student Information System (SIS).
- The requesters and awarders from schools receive notification via email with service link ticket # once the request is completed. This notification will include the item type number and the new chartfield information.

Both Chartfield and Description Change

- If the change is for funds 24, 25, 72, or 73, the request is routed to Sponsored Programs Administration (SPA) for review and approval. If approved, it is routed in parallel to both the Office of the Bursar and Office of Financial Aid (OFA), else a rejection notification is sent to the requester.
- For all other funds, the request is routed in parallel to both the Office of the Bursar and Office of Financial Aid (OFA). The Office of the Bursar appends the new chartfield information to the item type in the Student Information System (SIS) and the Office of Financial Aid (OFA) updates the description.
- The requesters and awarders from schools receive notification via email once the request is completed. This notification will include the item type number and the new chartfield information.
- The requesters and awarders from schools receive a notification via email with service link ticket # once the request is completed. This notification will include the item type number and the new chartfield information.

Rejection of Requests

If there is an issue with the request, the requester from schools will receive notification via

email with service link ticket # that the request was rejected. The department who rejected the request will follow up with the requestor to resolve the issue.