OnBase – Item Type Request – Job Aid (Requestor)

ITEM TYPE REQUEST FORM

The Office of Financial Aid processes all awards through the PeopleSoft student system (OPUS) using award specific item types. Financial Aid award disbursements are processed to student accounts on a nightly basis. The item type maps the financial aid transaction to the appropriate general ledger account during the nightly general ledger post process.

The purpose of the online form is to request new item types or make changes to existing item types. Please ensure all award item type requests contain valid SpeedTypes (smartkeys) with an EMUNV business unit.

Follow the below link to the request form and complete required fields.

http://studentaid.emory.edu/financial-operations/

All fields in Section I and Section II are required.

Section II questions are presented when the Request Type is chosen.

The request will automatically be assigned to the Associate Director based on the career chosen.

Once the entire form is completed, click the “Submit” button.
### Section II - Request Information

**When is the first Academic Year and Academic Term the award should be used with the new account information?**

- **Academic Year**
  - [ ]
  - [ ]

- **Academic Term**
  - [ ]
  - [ ]

- **Item Type Number (12 digits)**
  - [ ]

- **Award Name**
  - [ ]

- **Who will post the award?**
  - [ ]

### Section II A - Speed Type Change

**Old Speed Type (10 digits)**
- [ ]

**New Speed Type (10 digits)**
- [ ]

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**Request Type A – Speed Type Change (smart key)**

Complete all fields indicated.

Use the full award name from PeopleSoft (OPUS).

Once the entire form is completed, click the “Submit” button.

The requestor will receive email notification that the request has been received by the Office of Financial Aid.

**Note:** Speed Types are no less than 10 digits. Enter all characters including leading zeros.
Section II - Request Information

When is the first Academic Year and Academic Term the award should be used with the new account information?

- **Academic Year**: [Input Field]
- **Academic Term**: [Input Field]

**Item Type Number (12 digits)**
- [Input Field]

**Award Name**
- [Input Field]

**Who will post the award?**
- [Input Field]

Section II B - Account Change

- **Old Account**
- **New Account**

Submit

**Request Type B – Account Change**

Complete all fields indicated.

Use the full award name from PeopleSoft (OPUS).

Once the entire form is completed, click the “Submit” button.

The requestor will receive email notification that the request has been received by the Office of Financial Aid.

**Note**: Accounts are 6 digits.
Request Type C – Award Name Change

Complete all fields indicated.

Use the full award name from PeopleSoft (OPUS) for the “Old Award Description”.

Once the entire form is completed, click the “Submit” button.

The requestor will receive email notification that the request has been received by the Office of Financial Aid.
### Request Type D – New Award Request

Complete all fields indicated.

**Speed Types**
- Speed Types are no less than 10 digits.
- Enter all characters including leading zeros.

**Descriptions**
- Award Description = 32-character limit.
- Short Description = 10-character limit.

Check the Summer award box to indicate a Summer item type is needed.

Provide a brief award summary (i.e. preferences, intent, restrictions)

Once the entire form is completed, click the “Submit” button.

The requestor will receive email notification that the request has been received by the Office of Financial Aid.

**Note:** Standard non-grant awards will default to 61300 (scholarship expense) account unless otherwise specified.