

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.

[Item Type Request Form](#)

Emory University | Division of Enrollment Services

Office of Financial Aid | Item Type Request Form Advising Cluster Accounting Cluster Operations Cluster

Section I – Requestor Information

NETID* Phone* Career*

First Name* Email* Request Type*

Last Name* This request will be assigned to:

Department*

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* Item Type Number (12 digits)*

Academic Term* Award Name*

Who will post the award?*

Section VI – Office Use Only

Submit Date Request Status Status Date

Status Updated By

EMORY UNIVERSITY

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?*

 ▼

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 A - SpeedType Change

Old SpeedType (10 digits)*

New SpeedType (10 digits)*

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?*

 ▼

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.

Section II B - Account Change

Old Account*

New Account*

Submit

Section II - Request Information

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

Item Type Number (12 digits)*

Who will post the award?*

Academic Year*

Academic Term*

Section II C - Award Name Change

Old Award Description*

New Award Description*

For the "New Award Description", you do not need to add "SUM" for a summer award.

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.

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*

Who will post the award?*

Section II D – New Award Request

SpeedType (10 digits)*

Award Description*

Award Short Description*

Account*

Additional Notes

This a Summer Award*

Funding Source*

Award Type*

Apply to career: (Choose a specific career OR choose "ALL")*

Request Type D – New Award Request

Complete all fields indicated.

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.