


PeopleSoft Student Financials

Documentation

1. Complete the Request for Item Type Action Form to create or modify an item type.

University of Houston  Clear Lake																									
Request for Item Type Action																									
Item Type:																									
<input type="checkbox"/> Create New Item Type																									
<input type="checkbox"/> Modify Item Type																									
Set ID: 00797		For GA / SBS Use Only																							
Item Type: <input style="width: 100%;" type="text"/>		Effective Date:		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>M</td><td>M</td><td>D</td><td>D</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td> </tr> <tr> <td>0</td><td>4</td><td>2</td><td>1</td><td>2</td><td>0</td><td>0</td><td>3</td> </tr> </table>						M	M	D	D	Y	Y	Y	Y	0	4	2	1	2	0	0	3
M	M	D	D	Y	Y	Y	Y																		
0	4	2	1	2	0	0	3																		
Description: <input style="width: 90%;" type="text"/>		(limited to 30 characters)																							
<i>Complete for Add or Modify:</i>																									
GL Interface																									
For Term: <input style="width: 100%;" type="text"/>		For All Terms: <input type="checkbox"/>		New Cost Center in GL: <input type="checkbox"/>																					
Effective Date: <input style="width: 100%;" type="text"/>				For GA / SBS Use Only																					
				Keywords: 1. <input style="width: 100%;" type="text"/>																					

2. Check the box to either create or modify an Item Type.
3. Enter the Item Type number if the Item Type is to be modified. General Accounting will assign the new Item Type Number for Item Type creates.
4. Enter the Description or Name of the Item Type (limited to 30 characters).
5. Select the term from the drop down box applicable to the new or modified Item Type. Select “For All Terms” if prior terms are to be modified as of the effective date.
6. Select “Yes” from the drop down box if the cost center for this Item Type is a new cost center in GL. If the cost center is a new cost center, this Item Type Action Form must be attached to the Cost Center Action Form.
7. Enter the date the item type is to be effective.
8. The gray area effective date is for General Accounting / Student Business Services office use only.

DEBIT GL Unit 00759 - ACTUALS		2.	
Fund:	<input type="text"/>	3.	
Department:	<input type="text" value="C"/>	Classification:	<input type="text"/>
Program:	<input type="text"/>	<input type="checkbox"/> Yes GL Interface Required	
Project/Grant:	<input type="text"/>	Default Amount	<input type="text"/> 1098-T Eligible <input type="checkbox"/>
Account:	<input type="text"/>	Charge Priority List:	<input type="text"/>
Budget Ref:	<input type="text"/>	Payment Overall Priority:	<input type="text"/>
CREDIT GL Unit 00759 - ACTUALS		<input type="checkbox"/> Refundable Indicator	
Fund:	<input type="text"/>	Taxable:	<input type="text"/>
Department:	<input type="text" value="C"/>	Priority:	<input type="text"/>
Program:	<input type="text"/>	<input type="checkbox"/> Pick up Receivable from Charge	
Project/Grant:	<input type="text"/>		
Account:	<input type="text"/>		
Budget Ref:	<input type="text"/>		
Run: Setup SACR>Security>Process>Set Security after adding new item types.			
Reason for Item Type Add or Modification:			
<input type="text"/>			

9. Enter the Debit and Credit Fund, Department, Program, Project/Grant, Account, and Budget Reference for the item type to feed to GL.
10. Give a reason for this Item Type creation or modification.

Business Administrator Approval:	Type/Print Name: _____, Business Administrator		Date: _____
Tuition and Fees Approval:	Type/Print Name: Deja Sero, Director, Planning & Budget		Date: _____
PS Ledger 5 Grants Approval:	Type/Print Name: Nancy Devino, Executive Director, Office for Sponsored Programs		Date: _____
Financial Aid Approval:	Type/Print Name: Holly Nolan, Executive Director, Financial Aid		Date: _____
General Accounting Approval:	Type/Print Name: Cindy Lamb, Accountant III	Date: _____	Krista Buckminster, Dir, Gen Acct/Fin Reporting
AVP Business Operations Approval:	Type/Print Name: Sherry Hawn, Associate Vice President, Business Operations		Date: _____
Student Business Services Approval:	Type/Print Name: Melissa Hernandez, Director, Student Business Services		Date: _____
For any questions regarding this form, please contact Cindy Lamb at 281-283-2147 or lamb@uhcl.edu.			Last Revised: 02/16/2022
Submit completed forms to General Accounting MC 104 or to lamb@uhcl.edu.			

11. The following types of approval signatures are required in the listed scenarios above:

Business Administrator Approval	Required when creating or modifying any Item Type.
Tuition and Fees Approval	Required when creating or modifying an Item Type related to Tuition and Fees.
PS Ledger 5 Grants Approval	Required when creating or modifying an Item Type related to Ledger 5 Grants.
Financial Aid Approval	Required when creating or modifying an Item Type related to scholarships or waivers.
General Accounting Approval	Required when creating or modifying any Item Type.
AVP Business Operations Approval	Required when creating or modifying any Item Type.
Student Business Services Approval	Required when creating or modifying any Item Type.

12. For questions on these instructions, please contact Cindy Lamb at 281-283-2147 or at lamb@uhcl.edu. Submit completed forms to General Accounting MC 104 or to lamb@uhcl.edu.