



Process for New Item Type Setup

- 1 Requestor fills out top portion of “New Item Type Request Form” and emails Accounts Receivable. Required fields are :
Type of Request, Course Fee/Description, Reason for New Item Type, Course # (if applicable), Amount of Fee, Academic Credit, Requestor’s Name and Date of Request
- 2 Upon receiving form A/R Accountant fills out bottom portion of form, required fields are:
Item Type, AbbDesc/Name, Charge Priority List, PS Chartfields, CSU Fee Category #, CSU Fee Category Description, Object Code, CSU Fund and Term.
- 3 Once completed, form is forwarded to the Director - Tax and Compliance who reviews whether new item type is 1098T eligible. Director – Tax and Compliance signs and dates form and forwards to A/R Manager for review.
- 4 A/R Manager reviews/approves form and returns to A/R accountant.
- 5 A/R Accountant creates new item type in Student Finance.