CALIFORNIA STATE UNIVERSITY SAN BERNARDINO

ITEM TYPE REQUEST FORM

DEPARTMENT INFORMATION

Date	
Department	
Requestor's Name	
Approver's Name	
	(Approver must be authorized signer on account
Requestor's Email	
Requestor's Phone	
Notes/Comments	

ITEM TYPE DETAILS (to be completed by requestor)

Purpose of Item Type					
Item Type Name					
Item Type Details					
Please Check One	Apply to Fees	Do not Apply to fees	Non disbursable		
Chartfield (Account)					
	Account	Fund	Dept.	Program	Class/XR	Project
Expenditure Source	☐	State		☐	UEC

FOR STUDENT ACCOUNTS ONLY

ITEM TYPE #		DATE COMPLETED	

Item Type Set Up Questions (to be completed by requestor)

Do not leave any part blank, if not applicable mark no.

Is this need based?	UGRAD or PBAC or Both	Min GPA	Does student need to meet SAP	Does a FASFA need to be on file	Does student need to meet all financial aid eligibility requirement	
Yes No			Yes No	Yes No		

DEPARTMENT INFORMATION

Date: Enter the date of the request.

Department: Enter the name of the department requesting the new item type.

Requestor's Name: Enter the name of the person requesting the new item type.

Approver's Name: Enter the name of the individual that has signature authority to authorize payments for the new item type.

Requestor's email: Enter the email address of the individual requesting the new item type.

Requestor's Telephone No.: Enter the telephone extension of the individual requesting the new item type.

Notes/Comments: Enter any information that you feel is important and should be taken into consideration for payments from the new item type.

ITEM TYPE DETAILS

Purpose of Item Type: Please indicate why funds are being awarded to students.

Item Type Name: Enter a description that will show on student accounts for payments/awards from this item type.

Item Type Details: Indicate if payment/award should be applied to student fees, it should go directly to the student, or if it is non disbursable.

Chartfield/Account: Enter the account, fund, department, program, class, and project if applicable. Please note that not all departments use the class and project codes.

Expenditure Source: Indicate if the funds are in stateside, PHIL, or UEC account.

Item Type Set Up Questions:

This section helps the financial aid office and ours in how the item type gets set up and the nature of how the item type will act. If any of the sections are not applicable please mark no. Do not leave anything blank.