



CONSTRAINTS

New Item Type Request Form (Boomi)

Submit the Item Type Request Form through Boomi. Use this form to request the creation of an Item Type Number for a **financial aid payment**.

There are three types of student payments:

1. Payroll Payment – for employment and internships paid through Payroll.
2. Non-Payroll Payment – expense reimbursement through Accounts Payable
3. **Financial Aid Payment – education-related, scholarship, fellowship, stipend, or another academic award paid through the student account.**

Note: Please refer to umiami.policystat.com/policy/11533769 for further information from the Controller’s Office regarding “Payments to Students”.

The intent of an Item Type is to capture certain fields and parameters required to populate information into CaneLink and PowerFAIDS to disburse funds to a student’s UM account.

For assistance, please contact Zaida Mejia via email: zam10@miami.edu.

Section 1: UNIVERSITY LOCATION INFORMATION

Requester Information: your contact information is populated using the “Single Sign On” data system.

Phone/Contact Number: enter your 10-digit phone number.

Academic Organization / Administrative Unit: use the drop-down menu to select your College/Department.

- Click the “**LOAD ORG/UNITS**” button.

Organization / Unit: use the drop-down menu to select your Organization/Unit.

- If your departmental data does not appear:
 - select the “**Other not in list**” option from the drop-down menus and write in the Academic Organization/Administrative Unit information in the ‘Describe the purpose of this Item Type’ box in **Section 5**.



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Section 2: NAME REQUESTED FOR ITEM TYPE

Item Type Name:

Please be advised of the following parameters for this field:

1. Choose a name that describes the type of award – Scholarship, Assistantship, Fellowship, Stipend, Award, Reimbursement, Loan, Fees, Health Insurance, Tuition.
(For example: “**GR Travel Reimb**” for a Graduate travel reimbursement or “**UG Goya Sch**” for an undergraduate scholarship)
2. The Item Type Name cannot include personally identifiable information such as the student’s name, initials, Student ID, Student SSN.
3. The Item Type Name **cannot exceed 27 characters**. Please consult with the benefactors for their input prior to submitting the information so that all parties agree.
4. Academic or Awarding Years **should not** be included in the Item Type Name.

Short Item Type Name – This is a required field.

1. The Short Item Type Name **cannot exceed 10 characters**. This name may appear on internal University Reports.
(For example, “**GRTRVREIMB**” for GR Travel Reimb” or “**GOYA SCH**” for UG Goya Sch)

Section 3: ACCOUNTING, BUDGET, AND FUNDING INFORMATION

Consult with your Budget Managers as needed. Federal Grants may specify allowable transactions and how to classify them for reporting. The Office of Research Administration may be of further assistance with this subject.

FDM Worktag ID Prefix: select the appropriate Worktag ID Prefix from the drop-down menu.

Workday FDM Worktag ID Number - provide an active Worktag ID. This field contains six digits.

FDM Spend Category Prefix: Select SC from the drop-down menu.

Workday FDM Spend Category ID Number - provide an active spend Category ID Number. This field contains five digits.

- Click the “**VALIDATE**” button to perform a validation check through the WorkDay database.



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Keyword #3

The “Keyword #3” (K#3) is used for reporting purposes by the University. The K#3 consists of a combination of three sets informational pieces:

1. *Source of Funds*
2. *Types of Awards*
3. *Basis for Awarding.*

Certain combinations requiring a FAFSA are identified using **Light Orange** text in the grid. The **Light Orange K#3 categories are only used by the Office of Student Financial Assistance & Employment.**

Acceptable K#3 combinations are:

ATH_SCH_AT	DIS_GRA_ND	FED_ASS_EN	FLA_GRA_ND	OST_SCH_AM
DEP_ASS_DM	DIS_SCH_AM	FED_FWS_ND	FLA_SCH_AM	OUT_GRA_EN
DEP_ASS_EN	DIS_SCH_DM	FED_GRA_EN	GIF_ASS_DM	OUT_GRA_ND
DEP_GRA_EN	END_ASS_DM	FED_GRA_ND	GIF_ASS_EN	OUT_OLN_EN
DEP_GRA_ND	END_ASS_EN	FED_NLN_ND	GIF_GRA_EN	OUT_SCH_AM
DEP_NLN_ND	END_GRA_EN	FED_OLN_EN	GIF_GRA_ND	OUT_SCH_DM
DEP_OLN_EN	END_GRA_ND	FED_SCH_AM	GIF_OLN_EN	TRM_GRA_EN
DEP_OWK_EN	END_SCH_AM	FLA_ASS_DM	GIF_SCH_AM	
DEP_SCH_DM	END_SCH_DM	FLA_FWS_ND	GIF_SCH_DM	
DIS_GRA_EN	FED_ASS_DM	FLA_GRA_EN	OST_GRA_ND	

Source of Funds:

- **ATH** - Athletic – the source of funding is only for athletes attending the institution.
- **DEP** - Departmental Owned/Waivers – this source of funding is only for Students deemed eligible by a university department.
- **DIS** - Discountable Aid – funds available to students as determined by upper management of an individual university department.
- **END** - Endowment Account – funds donors have given with stipulations as to the use of the principle of the gift, given to the university over several periods.
- **FED** - Federal/Government – funding originates from any federal/governmental agency or funding source.
- **FLA** - State of Florida – funding is from a State of Florida agency or State of Florida funding source.
- **GIF** - Gift Account – a one-time gift donated to a student, or a gift agreement to assist with the debt of a student.



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- **OST** - Other U.S. State or U.S. Territory – funding source is from a state or territory other than Florida.
- **OUT** - Outside/Other – source of funds originates from other funds and sources not otherwise defined.
- **TRM** - Tuition Remission – the cancellation of a debt, charge, or penalty, either complete or partial, by an institutional department or program.

Types of Awards:

- **ASS** – payment may be made in intervals for the following categories:
 - a. Assistantship/Fellowship – a financial endowment set up to support graduate students / a paid appointment awarded annually to a qualified graduate student that requires part-time teaching, research, or residence hall duties.
 - b. Stipend – a fixed regular sum paid to a student as a salary or as expenses are incurred.
 - c. Trainee – a student undergoing training for a particular career or profession. This was coded in Workday as “GRAD-3 Activity.”
- **GRA** – money given by a state or federal government agency or other private organization to fund education and research:
 - a. Awards/Prizes – to confer or bestow a financial payment to a student based on merit, deservedness, or need / to partake in a contest for a reward.
- **SCH** – money awarded to a student to help with living expenses, study.
 - a. Travel – associated to/with an educational purpose and not representing the University in an athletic, club or business event.
- **FWS** - Florida/Federal/College Work Study – an amount paid to a student for performing duties or activities from a state or federal award for employment with a university department.
- **OWK** - Other Employment – an amount paid to a student for performing duties or activities from a federal or state award for employment by a business entity outside the university.
- **NLN** - Need Base Loan – an amount of money given to a student/parent/guardian on the condition that the loan will be paid back with interest at a future time based on the financial need of the individual as determined by the Federal Government using the FAFSA (Free Application for Federal Student Aid) in order to demonstrate need, and if student meets the federal parameters for this category.
- **OLN** - Other Loan – based on factors other than financial need of the individual.



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Basis for Awards:

- **ND - *Need** – recipients must file a FAFSA (Free Application for Federal Student Aid) to demonstrate need, to determine if a student meets the federal parameters for this category.
- **EN - Entitlement** – is a government program guaranteeing access to a benefit by members of a specific group and based on established rights or by legislation.
- **AM - **Academic Merit** – recipients must demonstrate Academic Achievement
- **AT - **Athletic Merit** – recipients must demonstrate Athletic Achievement
- **DM - **Departmental Merit** – a recipient must adhere to parameters set by the awarding department.

*Is this award Need Based? – need based aid will require the student to have a completed financial aid file on record for the academic year before funds are disbursed.

**Merit - Please indicate the minimum requirements in the 'Describe the purpose of this Item Type' box in Section 5.

Section 4: STUDENT CAREER, TERM, CHARGING AND ENROLLMENT REQUIREMENTS

Career – select the appropriate career based on the student level (Undergraduate, Graduate, Law, Medical).

Effective Term – select the term for the award.

Enrollment Needed for Disbursement – select the required student enrollment to disburse funds.

Payment Option:

- Pay Student Account Charges – **FINAID/Refundable**
Any amount disbursed to a student's UM account will automatically pay for any debt the student may owe to the university. Any remaining funds are released to the student in accordance with Student Accounts' refund policies.
- Do Not Pay Student Account Charges – **NOCHG/Refundable**
Any amount disbursed to a student's UM account are released in its entirety to the student in accordance with Student Accounts' refund policies.
- Financial Aid Item Type Restrictions / Not Refundable
Not Refundable Additional Selections - For Specific Charges:
 - Tuition Charges Only
 - Fees Charges Only
 - Health Insurance Charges Only



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- Specific Reasoning (Please specify charges to be paid in the ‘Describe the purpose of this Item Type’ box in Section 5.)

Is this Athletic Aid? - check this box if this award is Athletic Aid.

Section 5: PLEASE DESCRIBE THE PURPOSE, ANY RESTRICTIONS, AND OTHER PERTINENT INFORMATION FOR THIS ITEM TYPE

Include any additional information or special instructions that may assist staff in creating this item type.

Certification – certify the information submitted is correct.

Click “**Submit.**”