Penn Student Registration & Financial Services

pennant accounts

Pennant Charge Detail Code Request Form

» **Please forward/scan/send to penntdnr@pobox.upenn.edu** «

Please provide the following information

Date of request [   ]   **Date needed by** [   ]

Type of Request

☐ Add new detail code

     If appropriate, start with copy from detail code [   ]

     New detail code will be used starting with term   ☐ Fall   ☐ Spring   ☐ S1   ☐ S2   Year: 20 [   ]

☐ Change detail code [   ]

For new detail codes, complete items 1-5 and 7-8 below. For changes to an existing detail code, complete items 6, 7 & 8.

1. **Description to appear on student account (30 characters max)**

[ ]

2. **Identify the general nature of this charge:**

     ☐ **Tuition or course-/curriculum-/program-based fee (incl study abroad) – see Note 1 below**

     ☐ **Housing**   ☐ Rent   ☐ College house/program fee   ☐ FSA – member/program fee

            ☐ Security deposit   ☐ Damages/cancellation fees/fines

     ☐ **Dining**   ☐ University meal plan   ☐ Retail dining

     ☐ **Student health**   ☐ Health insurance   ☐ Student health charges

     ☐ **Library services/fines**

     ☐ **Sales/services** If this charge is to be used against the SRFS Line of Credit, enter Bb location code [   ]

     ☐ **Other** please describe [   ]

     SRFS ONLY
     ☐ Refund   ☐ Return   ☐ Void   ☐ Tax   ☐ Adjustments

3. **How will this charge get posted to students' accounts?**

     ☐ File or excel spreadsheet sent to the Pennant Feeder App; data origin [   ] (see Note 2 below)

     ☐ Automated tuition calc/drop-add process   ☐ Manual data entry

4. **List the names and Penn IDs of the individuals who are authorized for feeder access/manual entry of this detail code**

[   ] [   ]

[   ] [   ]

[   ] [   ]

[   ] [   ]

[   ] [   ]

5. **GL account number (Account C)**

[ ][ ][ ]-[ ][ ][ ][ ]-[ ][ ][ ][ ][ ][ ]-[ ][ ][ ][ ]-[ ][ ][ ][ ]-[ ][ ][ ][ ]

6. **If this is a request for a change to an existing detail code, check one of the change types below**

   ☐ **Inactivate detail code – as of date** _____

   ☐ **Change description. Enter new description below (30 char max)**

   [ ]

7. **Requester**

Name		Email	
Title		Phone	

   Signature: _____

8. **Name of business administrator**

   _____   Signature: _____

Special Notes

1. For enrollment-related charges, please also complete and attach the following form to provide supplemental details about this charge. http://www.upenn.edu/registrar/pennant/forms/CHARGE-Detail-Code-Supplemental-Info-Form.pdf
2. If this is a new Data Origin, please also complete and attach the following form:
   http://www.upenn.edu/registrar/pennant/forms/FEEDER-New-Data-Origin-Request-Form.pdf

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For Internal Use Only

Detail code _____   LOC charge ☐ Yes ☐ No   ☐ Computer purchase

Subcode mapping _____   1098T category
                                         ☐ QBC – Qualified billable charges
Category _____   ☐ SCH – Scholarships/grants
                                         ☐ SUPC – Supplemental charges
Priority _____   ☐ SUPP – Supplemental payments
                                         ☐ EXCL – Excluded
Refund indicator ☐ Yes ☐ No

Direct deposit ☐ Yes ☐ No   Aged receivable category _____

Institutional charge ☐ Yes ☐ No   1042S Eligible ☐ Yes ☐ No

PLS fee ☐ Yes ☐ No   Netting indicator ☐ N ☐ T ☐ D
                                         N = no netting; T= net by term and detail code;
                                         D (default) = net by term, detail code, and description

                                         Netting primary detail code _____

Approved/Rejected		Date	Signature
☐ Approved ☐ Rejected	**Student Accounts Management**	_____	_____
☐ Approved ☐ Rejected	**Budget Office**	_____	_____
☐ Approved ☐ Rejected	**Accounting Director**	_____	_____