

# Pennant Financial Code Request Form (Fund/Detail Code)

This guide outlines the steps for schools/departments to request Fund/Detail Codes

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## Open the **eform**

**Note:** If you receive the message 'You do not have the necessary permission to submit this form: Pennant Financial Aid Fund Code' Go to <https://upenn.bpllogix.net/workspace.aspx> and click on **Available Forms**, select **Pennant User Access Request**.

- What would you like to do (Select one)
  - [Request New Detail/Fund Code](#)
  - Deactivate or Change Detail /Fund Code
- *Note: Fields designated with a red line at left of field are required.*

## Instructions for [Request New Detail/Fund Code](#)

- **Request is for Charge**
- Code type - Detail Code selected automatically
- At Detail Code Name – enter description of new detail code
- Accounting String – Enter GL account number (Account C)
- Do you want to copy from existing detail Code:
  - Yes – Search for existing detail code by typing the first letter and select from the choice provided
  - No
- Identify the general category of this request:
  - Select radio button the best defines the new detail code
  - Note: If 'other' is selected you must describe in the required comment box.
- Will this detail code get posted to students' accounts via feeder app?
  - Select Yes and a Data Origin box appears
  - Select No
- Additional Comments
  - Enter if desired
- Select **SUBMIT FORM** or **CANCEL THIS REQUEST**
  - Submit will send the request to the next step and send an email to you acknowledging the request.
- **Request is for Payment**
- Select Payment Type
  - **Aid or Other**

## Aid

- Aid will default **Code Type = Fund Code**
- Fund Name – Enter Fund Name
- Accounting String - enter CNAC-ORG-BC-FUND-PGM-CREF
- School Fund Type – select from pull down list
  - **DAR selected**
    - Fund Type – select from pull down list. Note: If other select, you must complete the Additional Comments
    - Object Type – select from pull down list
    - Fund Source - select from pull down list
    - Financial Aid Year – Enter aid year e.g. 2526
  - **School selected**
    - Fund Type – select from pull down list. Note: If other select, you must complete the Additional Comments
    - Object Type – select from pull down list
    - Fund Source - select from pull down list
    - Financial Aid Year – Enter aid year e.g. 2526
    - Budget for Current Aid Year – Enter amount
    - Maximum Award – Enter amount
    - Minimum Award – Enter Amount
    - FASFA Required – Use pull down option and select Yes or No
    - Payable on Less Than Half Time - Use pull down option and select Yes or No
    - Additional Comments – Enter comments.
- Select SUBMIT FORM or CANCEL THIS REQUEST
  - Submit will send the request to the next step and send an email to you acknowledging the request.

## Other

- Other will default **Code Type = Detail Code**
- At Detail Code Name – enter description of new detail code
- Accounting String – Enter GL account number (Account C)
- Activation Term – Optional
- Do you want to copy from existing detail Code:

- Yes – Search for existing detail code by typing the first letter and select from the choice provided
  - No
- Identify the general category of this request:
  - Select radio button the best defines the new detail code
  - Note: If other is selected you must describe in the required comment box.
- Will this detail code get posted to students' accounts via feeder app?
  - Select Yes and a Data Origin box appears
  - Select No
- Additional Comments
  - Enter if desired
- Select SUBMIT FORM or CANCEL THIS REQUEST
  - Submit will send the request to the next step and send an email to you acknowledging the request.

## Instructions for [Deactivate or Change Detail/Fund Code](#)

- What would you like to do (Select one)
  - Request New Detail/Fund Code
  - **Deactivate or Change Detail /Fund Code**
- At **Select One** – use the pull down option to select your choice
  - **Deactivate Detail/Fund Code**
  - Change Detail/Fund Name
- **Request is for Charge**
- Code Type – Detail Code selected automatically
- Current Detail Code – enter detail code
- Deactivate as of Date – enter date
- Additional comments – enter additional comments supporting your request
- Select SUBMIT FORM or CANCEL THIS REQUEST
  - Submit will send the request to the next step and send an email to you acknowledging the request.
- **Request is for Payment**
- Select Payment Type
  - **Aid or Other**

### Aid

- Selecting Aid will default **Code Type = Fund Code**

- Fund Name – Enter Fund Name
- Deactivate as of Date – enter date
- Additional comments – enter additional comments supporting your request
- Select SUBMIT FORM or CANCEL THIS REQUEST
  - Submit will send the request to the next step and send an email to you acknowledging the request.

## Other

- Other will default **Code Type = Detail Code**
- Current Detail Code – enter detail code
- Deactivate as of Date – enter date
- Additional comments – enter additional comments supporting your request
- Select SUBMIT FORM or CANCEL THIS REQUEST
  - Submit will send the request to the next step and send an email to you acknowledging the request.
  
- At **Select One** – use the pull down option to select your choice
  - Deactivate Detail/Fund Code
  - **Change Detail/Fund Name**
  
- **Request is for Charge**
- Code Type – Detail Code selected automatically
- Current Detail Code – enter detail code
- New Detail/Fund Code Name
- Additional comments – enter additional comments supporting your request
- Select SUBMIT FORM or CANCEL THIS REQUEST
  - Submit will send the request to the next step and send an email to you acknowledging the request.
- **Request is for Payment**
- Select Payment Type
  - **Aid or Other**

## Aid

- Selecting Aid will default **Code Type = Fund Code**
- Current Fund Code Name – enter fund name
- New Detail/Fund Code Name – enter new name
- Additional comments – enter additional comments supporting your request
- Select SUBMIT FORM or CANCEL THIS REQUEST

- Submit will send the request to the next step and send an email to you acknowledging the request.

### Other

- Other will default **Code Type = Detail Code**
- Current Detail Code – enter detail code
- New Detail/Fund Code Name – enter new name
- Additional comments – enter additional comments supporting your request
- Select SUBMIT FORM or CANCEL THIS REQUEST
  - Submit will send the request to the next step and send an email to you acknowledging the request.

**When your request is completed, you will receive an email with the details of the request.**