Using FCSUA Salesforce to Complete the Program Information of the Annual Report

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Today’s Agenda

- FPCTP Annual Report—Program Information
  - Overview of Salesforce Platform
  - Sections of Program Information
  - Creating and Submitting Information
  - Cloning and Submitting Information
  - Connection to Program Application or Previous Report
  - Submission and Approval Process
Salesforce Access

- Access to portal
  - Two licenses available/institution
  - Person responsible for completing Annual Reports needs to be able to login
Salesforce Key Features

- Community Homepage
- Institutional profile with contacts
- Application
- Grant
- Scholarships
- Annual Reports
- Contact us
Annual Report-Program Information

- Section 1: General Information
  - Reporting Year
- Section 2: FPCTP Staffing
- Section 3: External Service Providers
- Section 4: FPCTP Credentials
  - Concentrations, CTE Programs, Industry Certifications, Micro-Credentials/Badges
Annual Report-Program Information

Section 5: FPCTP Recruitment, Enrollment, and Retention
- FPCTP Eligibility and Recruitment
- FPCTP Enrollment in This Reporting Year
- FPCTP Enrollment for Next Reporting Year
- FPCTP Enrollment Projections

Section 6: Peer Mentors
Creating and Submitting Program Information

- Recently approved FPCTPs
  - Click New
  - Information will be automatically pulled from Section 4 of Program Application
  - *Must work on these forms first*
Cloning and Submitting Program Information

- Clone last year’s report
- Information will pull from Staff, Section 4, External Service Providers (Agencies)
- It’s critical to double-check for accuracy and make needed changes
- *Must work on these forms first*
Submissions and Approval Process

- Save—draft to keep working
- Submit—FCSUA and your program will receive notice that you have completed entering information and the Program Information of the Annual Report is available for review by FCSUA
- Close—you are exiting the form. Remember to save before closing.
Submission and Approval Process

- Updates needed—comments included for clarification or needed changes
- Approved—everything looks good
- Not Approved—large amount of information missing
Reminders

- Will begin May 1st, 90 days prior to due date
- Every 2 weeks, 60 days out
- Due date, August 1st
- Stop once Annual Report is complete
Contact Us/Follow Us

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