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

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Today’s Agenda

- FPCTP Annual Report—Student Information
  - Overview of Salesforce Platform
  - Connections to Program Application or Previous Report and Scholarship Requests
  - Sections of Student Information
  - Creating and Submitting Information
  - Cloning and Submitting Information
  - Submission and Approval Process
  - Reminders
https://fcsua.force.com
Salesforce Key Features

- Community Homepage
- Institutional profile with contacts
- Application
- Grant
- Scholarships
- Annual Reports
- Contact us
Section 1: General Student Information

- Reporting year
  - Student demographic data
- Credentials
- Concentration/Tracks
- Student expected participation in FPCTP
- K-12 education
- Living situation, prior to FPCTP
- Career clusters, prior to FPCTP
- Work experience, prior to FPCTP
Section 2: Student Information

- Enrollment status
- Living situation
- Credentials
- Concentrations/Tracks
- Career clusters
- Work experience
Section 3: Student Exit Information

- Exit date
- Reason for exit
- Credentials
- Post-school plans
Creating and Submitting Student Information

- Must work on Program Information Forms first
  - Credentials will automatically pull from Section 4 of Program Information
- Click on New Student Report
- Enter Reporting Academic Year
  - This connects to students who received scholarships this year
  - Also connects to students continuing from previous year
- Click on Select Student
  - If student is in the list, Click Select
  - If not, Click Add new student
Cloning and Submitting Program Information

- Only for programs that had students the previous year
- Clone last year’s report
- Information will pull from previous year’s Student Information
- It’s critical to double-check for accuracy and make needed changes
Submissions and Approval Process

- **Save as a Draft** – keep working
- **Save as Complete**—all data are correct and ready for submission
  - Select all completed reports
- **Close**—you are exiting the form. Remember to save before closing.
- **Submit to FCSUA** – your program will receive notice that you have completed entering Student Information of the Annual Report and it is available for review by FCSUA
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

- Telephone 407.823.5225
- www.fcsua.org
- fcsua@ucf.edu
- Facebook: @FloridaCSUA
- Instagram: @floridacsua
- Twitter: @FloridaCSUA
Save the date!
April 27, 2021 Informational Webinar 3:00 – 4:30

Using Peer Mentors to Support Student Success

Presented by Dr. Gwen Carey, FAU ACI and Dr. Tara Rowe, UNF THRIVE Program