

Florida Center for Students with
UNIQUE ABILITIES

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

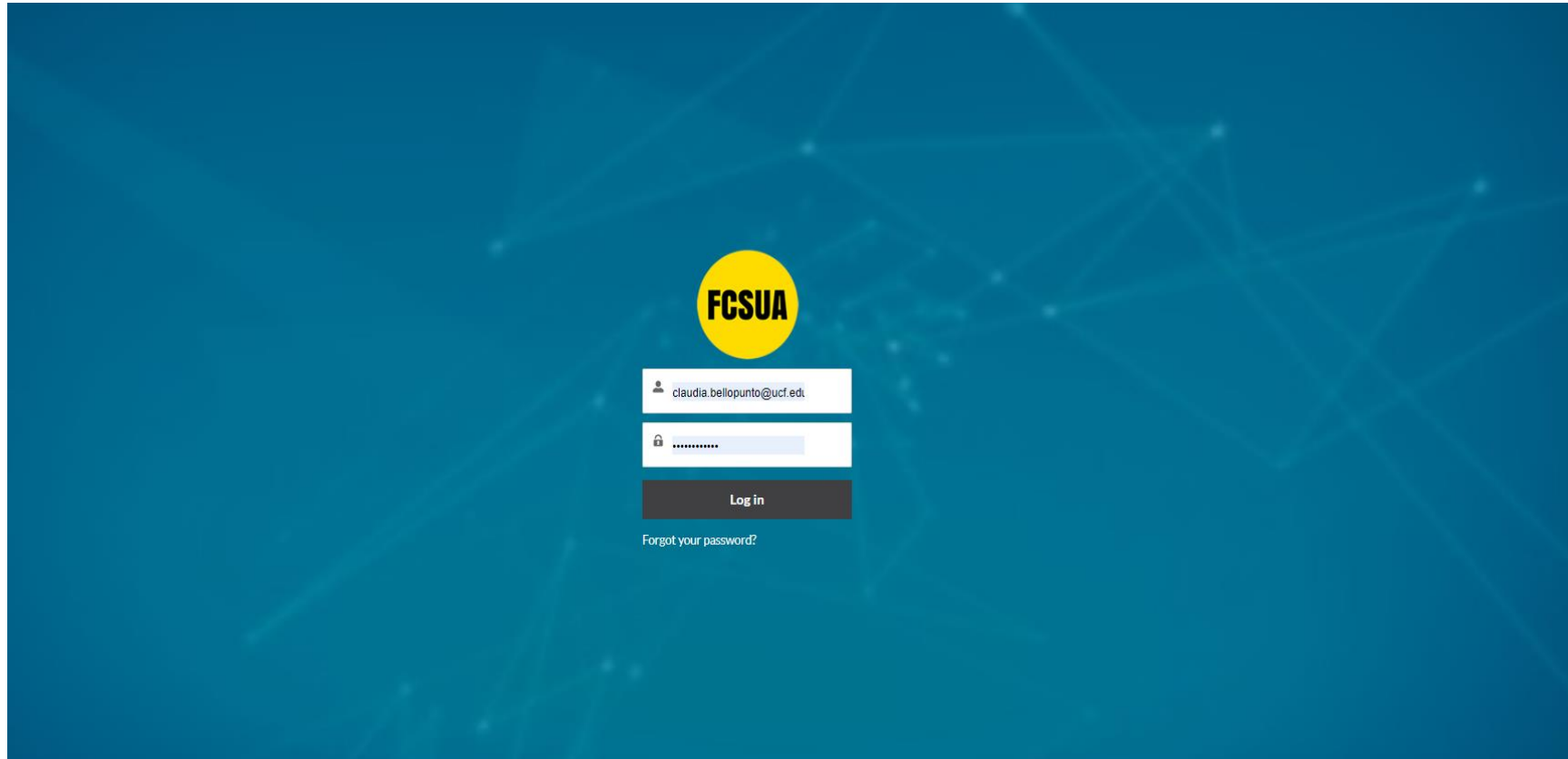
Claudia Bello Punto
Janice Seabrooks-Blackmore



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

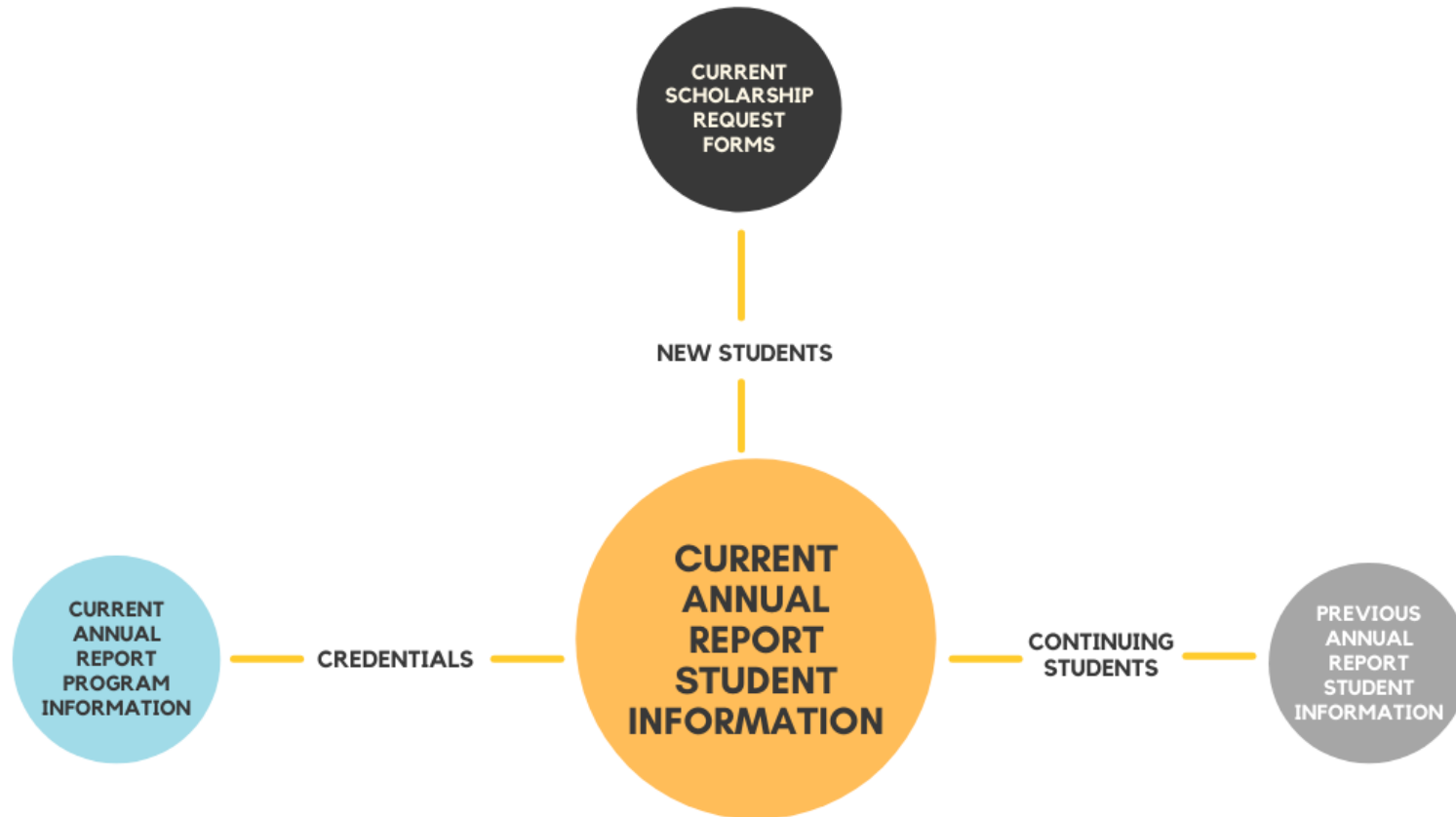
<https://fcsua.force.com>



Salesforce Key Features

- ▶ Community Homepage
- ▶ Institutional profile with contacts
- ▶ Application
- ▶ Grant
- ▶ Scholarships
- ▶ Annual Reports
- ▶ Contact us

Connections



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