FPCTP Scholarship Requests and Disbursement Reports Using FCSUA Salesforce Portal

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Today’s Agenda

- FPCTP Scholarship Requests
  - Overview of Salesforce Platform
  - Scholarship Estimator
  - Scholarship Request Forms
  - Scholarship Disbursement Reports
  - Connection to Annual Reports
Salesforce Access

- Access to portal
  - Two licenses available/institution
  - Person responsible for scholarship process needs to be able to login
https://fcsua.force.com
Key Features

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

- Scholarship Estimator
  - There can be more than one
  - Cost estimator name
  - Special attention section
  - Address for checks
  - Comments
  - Required fields
  - Other fees
Scholarship Requests

- Request List
  - New requests
  - Actions

- Forms
  - Search continuing students, or add new students
  - Other fields pull from Cost Estimator
  - Awarded and disbursed amounts
Scholarship Disbursement Report

- Entering amount for each term/semester
- Descriptions for special notes about a student
- Total disbursement amount automatically adds up
- Actions
Scholarship Summary

- Amounts awarded to institution
- Amounts disbursed to students
- Enrollment projections
- Amount to return to FCSUA
Reminders

- Sent one month prior to due date
  - Only sent to primary and financial aid contacts
- Sent every Tuesday until reports are completed
- Fall, December 1st
- Spring, April 30th
- Summer, August 1st
- Non-disbursed funds reminder, June 1st
Contact Us/Follow Us

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