

Florida Center for Students with
UNIQUE ABILITIES

FPCTP Scholarship Requests and Disbursement Reports Using FCSUA Salesforce Portal

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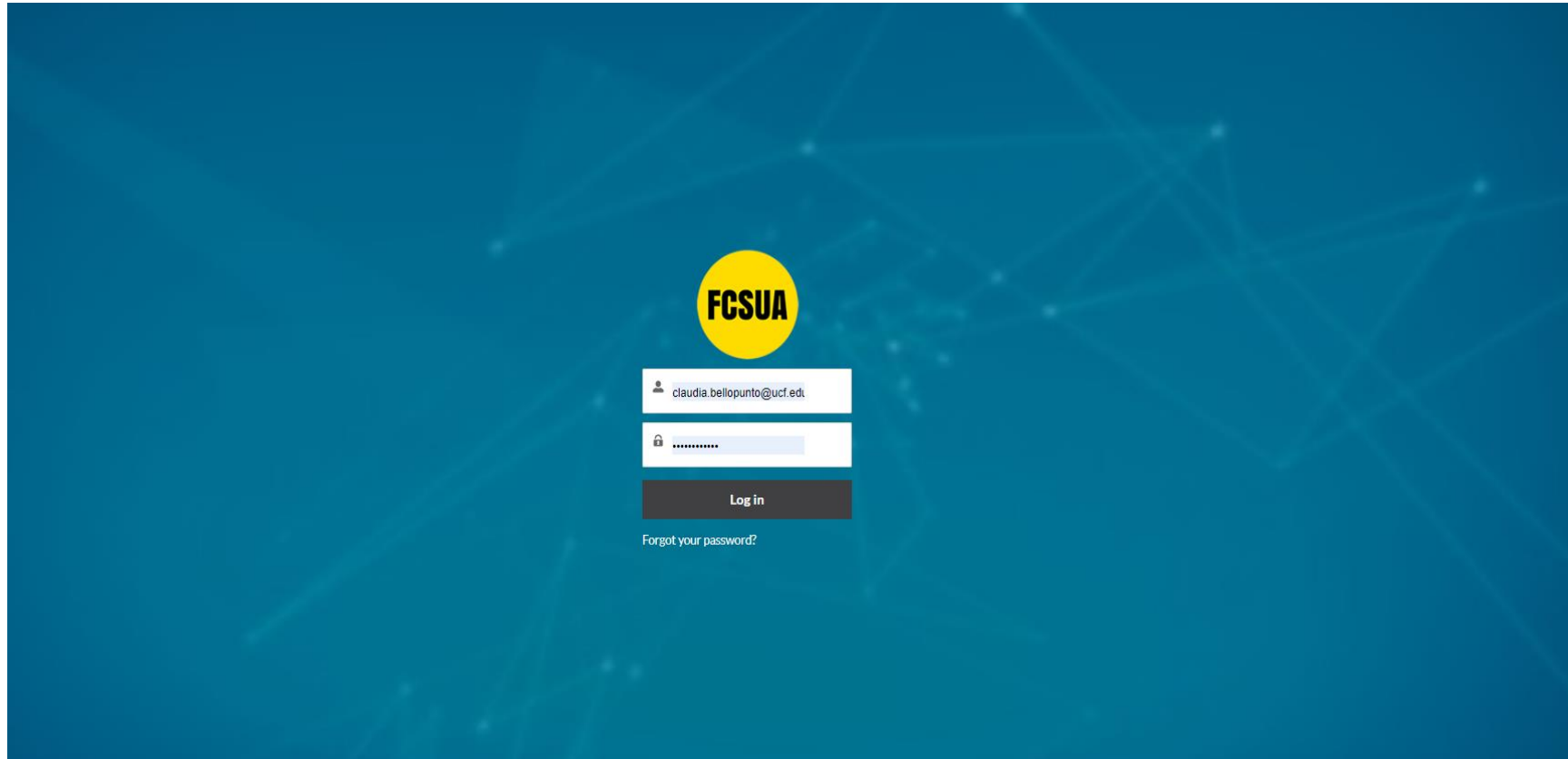
Today's Agenda

- ▶ 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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