Overview of Flow:
The department initiates the request choosing the financial aid office who normally process their form (Central, Medical or Honors), the request flows to the approver (typically the cost center manager) who reviews and approves. The initiator has the option of routing to a second approver. Once approved, the form routes to Financial Aid. Financial Aid enters the SmartTag and Banner Fund. Financial Aid can change the amount or deny the payment. Once approved the form routes to the Foundation for approval. Payments are issued upon receipt of fully completed form.

Workflow
Initiator → Approver → Optional Second Approver → Financial Aid office → Foundation office

Initiator:

1. **Open the Scholarship form**
   
   **Link:** Go to the Scholarship form

2. **Fill in the following:**
   a. College/Department
   b. Semester and Year - Enter academic term (Banner format),
   c. Date - Enter date of request.
   d. Enter gift number.
   e. Enter gift name.
   f. Select yes if award is need based (student has completed a FAFSFA).
   g. For each student enter the Z number, Recipient (Student) name and Initial Award Amount. Delete any lines that are not used.
   h. If the award requires a specific GPA, Hours Enrolled, Year in School, College Major or Number of Terms enter the information in the respective field.
   i. Select Financial Aid Group to Approve – Honors College and Medical School forms route to the financial aid office at the College all other Departments/Colleges should select “Central” to route to the Central Financial Aid Office
   j. Find First Approver: Enter the Z number of the appropriate cost center manager to approve. Click on Find and the Net Id and E-mail of approver will populate automatically.
k. Check here to add a second approver. – If you need a second approver click on the box and an additional section will open to enter the second approver Z number. Click Find to populate.

2. **Review Form Information** - If form meets scholarship criteria, click in the box to certify that it meets the criteria.

![Image](image1.png)

3. The form will be emailed from No Reply to the 1st Approver, once approved the form will route to the 2nd approver, if this option is selected. Each approver will receive an e-mail from noreply@fau.edu letting them know they need to approve.

**Approver:**

1. **You will receive an e-mail from NO REPLY. Click on the link in the e-mail or go to** [https://forms.fau.edu/tasks/](https://forms.fau.edu/tasks/)
   a. If no e-mail is received, login to the form system (frevvo) to review their forms.

2. **Additional Fields for Financial Aid use only will appear in red.**
   a. Enter Financial Aid SmartTag
   b. Enter the Banner Fund
   c. Review each student for criteria.
   d. Fin Aid Paid Amount – Amount defaults in from the initiator.
   e. Financial Aid can change the amount for each student or enter 0 if no scholarship should be paid.
Job aid for FAUF Scholarship Payment Request Form

3. Approve and Forward for Payment
   a. Click Approve
   b. Sign and Date Form
   c. Submit to send to Foundation Office.

Foundation Office:

1. Click on the link in the e-mail from NO REPLY or go to https://forms.fau.edu/tasks/
2. Review and Approve form for Payment.

Once form is approved and submitted:
The initiator, financial aid, cash management and FAUF accounts payable will receive a confirmation via NO REPLY that the form has been submitted.

1. FAF - creates supplied invoice request to pay the scholarship.
2. Cash Management - records the cash deposit from the form.

Find/Track the approval status for each form:

a. Login to frevvo form https://forms.fau.edu/tasks/
   b. Click on the magnifying glass icon.
   c. Setup search filters and click “Submit” button.
3. Audit Trail
   a. Left panel (see diagram) is the list of submissions under Scholarship Payment Request
   b. Select the submission, click on the arrows icons to show Audit Trail.
      o 1st column is status (pending/submitted)
      o 2nd column is the submitters.
      o 3rd column is date/time
      o 4th column - approvers
   c. Hold the mouse over “For User”: will see (Approver’s full name/role name)

Example to Search by Name

Field
Initiator Name

Condition
Contains

Value
Simply enter partial of First or Last name
(* case is sensitive)

d. Choose preferred task (click right arrows icon) to view Audit Trail.

“Submitted” = process is complete.