

Job aid for FAUF Scholarship Payment Request Form

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 → Fin Aid office → Foundation office

Initiator:

1. Open the Scholarship form

Link: [Go to the Scholarship form](#)

2. Fill in the following:

- College/Department
- Semester and Year - Enter academic term (Banner format),
- Date -Enter date of request.
- Enter gift number.
- Enter gift name.
- Select yes if award is need based (student has completed a FAFSFA).
- For each student enter the Z number, Recipient (Student) name and Initial Award Amount. Delete any lines that are not used.
- 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.

- 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
- 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.

College: Example Semester and Year (e.g. 201908): 202105 Date: 7/22/2021

Gift Number: AAA000 Gift Name: Name of Gift

Is the scholarship need-based? No

Znumber (max. 50z)	Recipient	Initial Award Amount	GPA	Hours Year Enroll in School	College Major	No. of Terms	FinAid Comments	FinAid to approve
z00001111	Donald Duck	5000.00	4.0					5000.00
z00002222	Daisy Duck	5000.00	4.0					5000.00

Total Initial Award: 10000.00 Upload document: Add Files

Select Financial Aid Group to Approve: Central Medical Honors

Initiator (expand for details)

Initiator Name: Charlene Blevens NetID: cblevens FAU Email: cblevens@fau.edu

Find First Approver

Enter the Z Number of the approver then click "Find".

1st Approver's Z Number: [input] Find Reset

Approver (First and Lastname): [input] FAU NetID * required: [input] Email: netid@fau.edu

Check here if it requires for the 2nd approver

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- 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.

Check here if it requires for the 2nd approver

▼ Find Second Approver

Enter the Z Number of the Approver then click FIND.

2nd Approver's Z Number

Approver (First and Lastname) FAU NetID * required Email

Comments

If you need to exit before completing the form click the "Save" button and exit the browser. Log back into the form system to complete the form. The following link will take you back to the form (<https://forms.fau.edu/tasks/>).

Sign this section

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/>
 - a. If no e-mail is received, login to the form system (frevvo) to review their forms.

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

NR NO REPLY <noreply@fau.edu>
Thu 6/24/2021 3:32 PM
To: Charlene Blevens
Cc: Charlene Blevens

Dear Approver,

An FAUF Scholarship Form needs your review and approval. you can access your task by clicking [this link](#)

Gift Number: SFA350

Gift name: Mary Frazier

Initiator: Charlene Blevens

Financial Aid Office:

1. Click on the link in the e-mail from NO REPLY or go to <https://forms.fau.edu/tasks/>

NR NO REPLY <noreply@fau.edu>
Thu 6/24/2021 3:18 PM
To: Charlene Blevens

Dear FinAid Central office,

An FAUF Scholarship Form needs your review and approval. you can access your task by clicking [this link](#)

Gift Number: EDU000

Gift name: Scholarships for Educaton

Initiator: Charlene Blevens

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.

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f. Fin Aid Comments – Enter a brief comment if needed for each student.

Gift Number SFA350	Gift Name Mary Frazier								
Is the scholarship need-based? No	FAU SmartTag Number TAG00004444								
	Banner Fund FOUSCH								
Znumber (max. 50z)	Recipient	Initial Award Amount	GPA	Hours Enroll	Year in School	College Major	No. of Term	FinAid Comments	FinAid paid amount
Z80001111	blue fish	1000.00	3.6	36			2	not eligibe	0.00
Z80002222	green fish	250.00	3.9	24	fre	bus	1		250.00
Total Initial Award 1250.00	Upload document								Total Approved Award 250.00

3. Approve and Forward for Payment

- a. Click Approve
- b. Sign and Date Form
- c. Submit to send to Foundation Office.

▼ Financial Aid (Medical) - expand for details		
Name Charlene Blevens	Net ID cblevens	FAU Email cblevens@fau.edu
Decision <input checked="" type="checkbox"/> Approve	Comments	
Charlene Blevens	Jun 24 2021	

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.

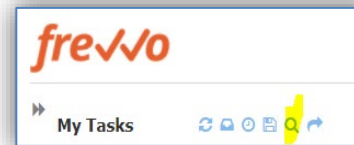
Once form is approved and submitted:

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.

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Enter search criteria and click Submit. Note that the search will only find tasks in your history, i.e. tasks that you have participated in. This search is not guaranteed to find tasks that are pending in your task list.

Search Filters

Form / Flow

Find task for which I am

Participant
 Workflow admin

Form/Flow

--- Scholarship Workflow

Start Date: 6/1/2021 End Date: 6/24/2021

Submission Status

SAVED PENDING SUBMITTED ABORTED
 WAITING

Errors only?

Yes

Filter Form/Flow by data (optional):

No.	Field	Condition	Value
1	InitiatorName	contains	Char

Field
InitiatorName

Condition
Contains

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

Logic Expression: 1

Reset

Example to Search by Name

Field
Initiator Name

Condition
Contains

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

3. Audit Trail

- Left panel (see diagram) is the list of submissions under Scholarship Payment Request
- Select the submission, click on the arrows icons to show Audit Trail.
 - 1st column is status (pending/submitted)
 - 2nd column is the submitters.
 - 3rd column is date/time
 - 4th column - approvers
- Hold the mouse over "For User": will see (Approver's full name/role name)

My Tasks Audit Trail

1	2	3	4
Charlene BL... Jun 16, 2021 at 1:37 EDT	PENDING	By: Charlene ..	Jun 16, 2021 at 16:33 EDT
Charlene BL... Jun 16, 2021 at 16:35 EDT	PENDING	By: Charlene ..	Jun 16, 2021 at 16:35 EDT
Charlene BL... Jun 17, 2021 at 14:41 EDT	PENDING	By: Charlene ..	Jun 16, 2021 at 16:37 EDT
Charlene BL... Jun 17, 2021 at 15:15 EDT	SUBMITTED	By: Charlene ..	Jun 16, 2021 at 16:37 EDT
Charlene BL... Jun 23, 2021 at 17:50 EDT			

For User: Charlene ..
Charlene Blevens (cblevens)

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

"Submitted" = process is complete.