

How to Submit a Financial Aid Scholarship/Award Request in WorkFront

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1. Introduction to WorkFront

What is WorkFront? WorkFront is an online project management system.

Click on image for video link to open.



a. How to Access WorkFront

You can access WorkFront through R'Space. Look for the Trainings and Tools section.



Scroll down and it will be the last link in the "Tools" section.

Tools

- UCPATH Portal
- DocuSign
- UCPATH Project Updates
- Manage MyAccount
- R'Projects: Project Intake
- Zimride
- UC Policies and Procedures
- UCR Policies and Procedures
- Delegations of Authority
- Facilities Trouble Tickets
- ServiceLink
- TechAlerts
- Encumbrance Tools & Tips
- On-Line Payroll Inquiry
- iTravel Web Support
- Reporting Systems @ UCR
- UCRFS Golden Tree Viewer
- UCRFS Online Reports Page
- Expiring Funds Notification System
- UCR Title and Pay Plan (Frozen)
- UCR HRMS Job Code Information
- Course Catalog Search
- Adoptions & Insights
- Web Recharge Rates
- Enterprise Reporting System
- Workfront

When you log in/create your account, you should see this:

The screenshot displays the UCR Requests dashboard. At the top, there's a navigation bar with links to Home, FAST Client Dashbo..., Requests, and Financial Aid Work ... A 'Pin current page' option is also visible. On the right side of the navigation bar, there are links for Help, a star icon, a notification badge with '96', a grid icon, and a search icon. Below the navigation bar, the main heading is 'Requests' with a 'New request' button on the right. A sidebar on the left shows a list of sections: 'Drafts (0)', 'Submitted', and 'Add custom section'. The main content area features a table with columns: 'Subject', 'Path', 'Entry Date', and 'Last Update Date'. Above the table, there is a 'Delete' button and a filter dropdown labeled 'Filter by request ty...'. The table is currently empty, and a large illustration of a person painting on an easel is centered in the background. Below the illustration, a message states: 'You don't have any draft requests. Draft requests are automatically saved here.'

2. Submitting a request

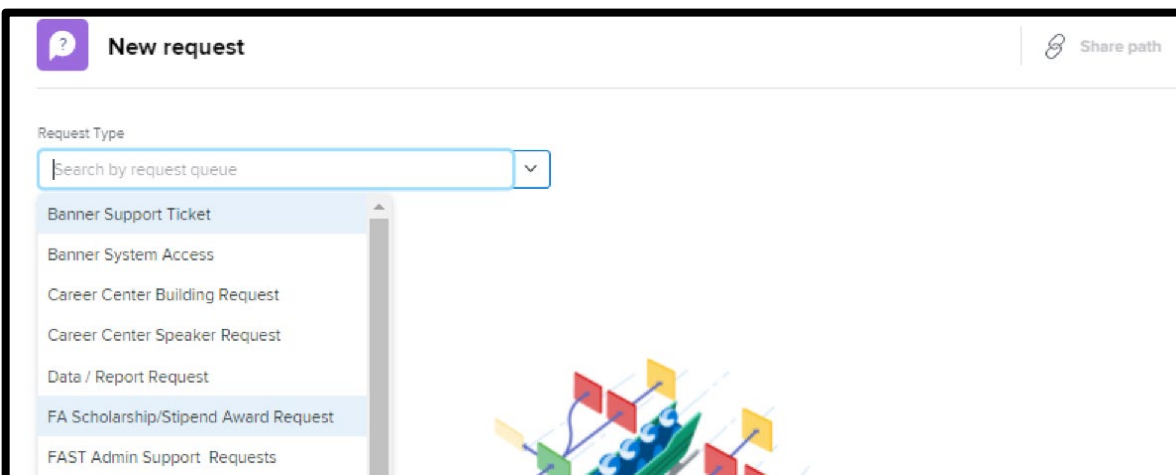
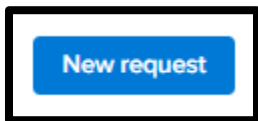
Please only submit one scholarship/award per request that uses the same funding source. If you have multiple scholarships, please submit a separate request for each award.

Additionally, we ask that you please try to follow our priority deadlines to ensure that your scholarships are awarded within enough time for them to help your student(s) meet the fee payment deadlines.

When to submit?

- **Peak seasons**
 - Summer awarding (April - May)
 - AY / Fall awarding (June - July)
- **Priority deadlines**
 - Summer (May 15)
 - Fall (August 15)
 - Winter (November 15)
 - Spring (February 15)

When in WorkFront, click on the “New request” icon and then use the drop down menu to locate and select option for “FA Scholarship/Stipend Award Request.”



Please note that this request is only to award undergraduate students or Graduate School of Education(GSOE) students. If you are needing to award a Graduate student, please contact Maria Pimentel in Grad Division. If you are needing to award a School of Medicine (SOM) student, please contact Theresa Luther at the SOM.

Additionally, please note that while we ask you for a 4 week lead time to process your request, we will make every effort to process it within 2-3 weeks.

New request
FA Student Scholarship

Request Type
FA Scholarship/Stipend Award Request

Details

Subject *
FA Student Scholarship

Primary Contact
Cesar Lopez

Scholarship Award Request

Student Information
Please upload a filled out copy of the Student Award Request template found below that lists the students who you are awarding.

[Click on the link to access excel template](#)

Other Comments or Notes

B I U

[Submit](#) [Close](#) [Discard draft](#)

FA Scholarship/Stipend Award Request

Please use this for:

- Undergraduate students
- Graduate School of Education Students

Do NOT use this for:

- Graduate Students – contact Maria Pimentel
- School of Medicine Students – contact Theresa Luther

Please provide a 4 week lead time for your disbursement
[show less...](#)

Type the name of the scholarship you’re awarding as the **Subject** line.

You can skip/scroll past the Excel template link for now. We will return to it soon.

The next section is labeled: **“Other Comments or Notes.”** Here, you will want to provide any additional information about the award or you where you can tag another member of your organization that you would normally collaborate with on these types of requests.

Under **“Entity Name,”** include which organization you are from – either a college or campus department

Entity Name *

Campus Department

- College of Humanities, Arts Social Science (CHASS)
- Marian and Rosemary Bourns College of Engineering (BCOE)
- College of Natural & Agricultural Science (CNAS)
- School of Business
- School of Public Policy
- School of Medicine
- Graduate School of Education (GSOE)

✓ Campus Department

In the next section, **Fund Information**, you will be asked to provide key information that we will need to verify the funding in order to process your request.

Fund Information

If you do not have an FAU to complete a BEA, it may delay the processing. However, please continue submitting this form so that we can review and then follow up with you.

Fund Description*

Student scholarship

X

Fund Number*

12345

X

Total Award Amount*

USD4000

X

BEA Journal ID*

000123123

X

Please provide all information requested if it is available to you. You can submit this request without the BEA and type in “TBD,” however it may delay processing.

If funds already exist within the Financial Aid Office’s accounts, then please add “N/A.”

Finally, we will include the student information on Excel template that was listed earlier on the page. Clicking on the link will take you to the page to download the Scholarship Stipend Award Template. It should appear in your Downloads folder or at the bottom of your page if you’re using Chrome Browser.

Scholarship Award Request


Student Information

Please upload a filled out copy of the Student Award Request

[Click on the link to access excel template](#)

SCHOLARSHIP STIPEND AWARD TEMPLATE

Scholarship Stipend Award Template

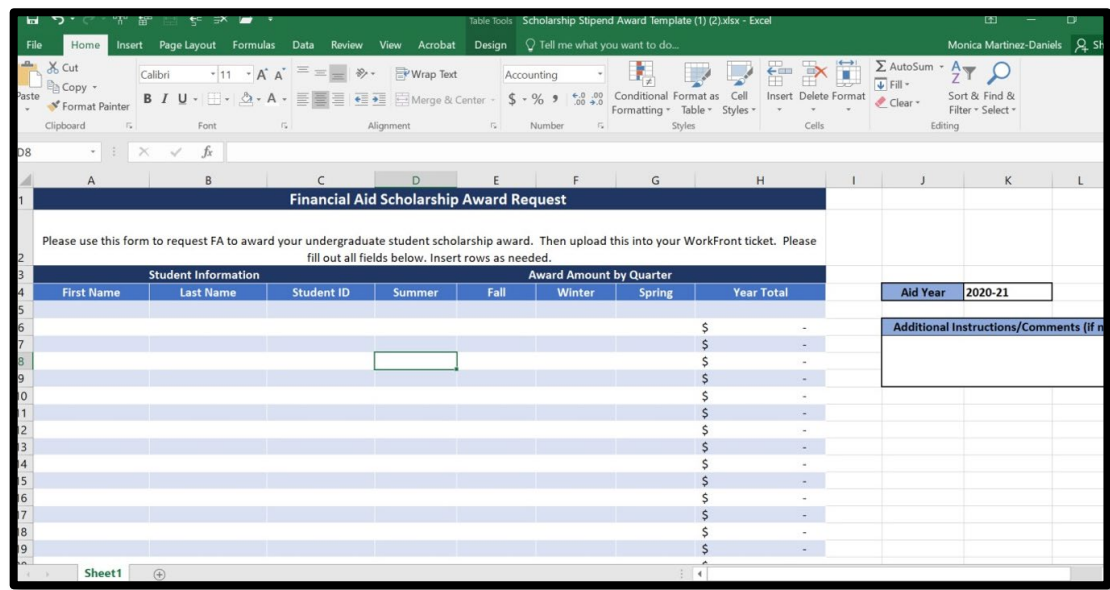


[Please Click Here to Download the File](#)

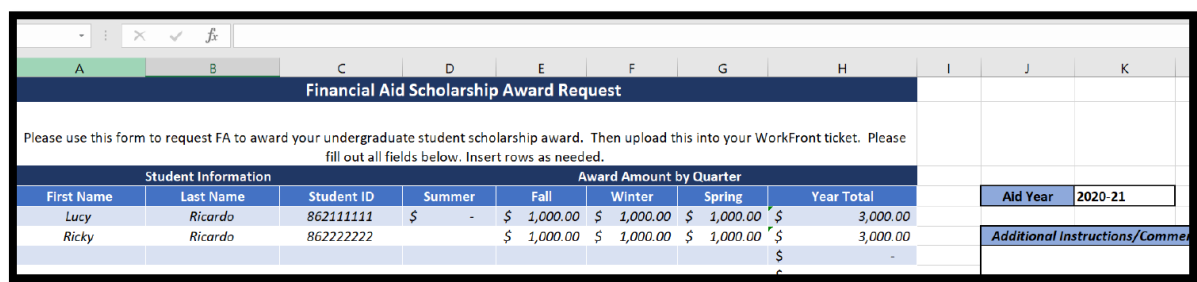
Search

Scholarship-Stipen...xlsx

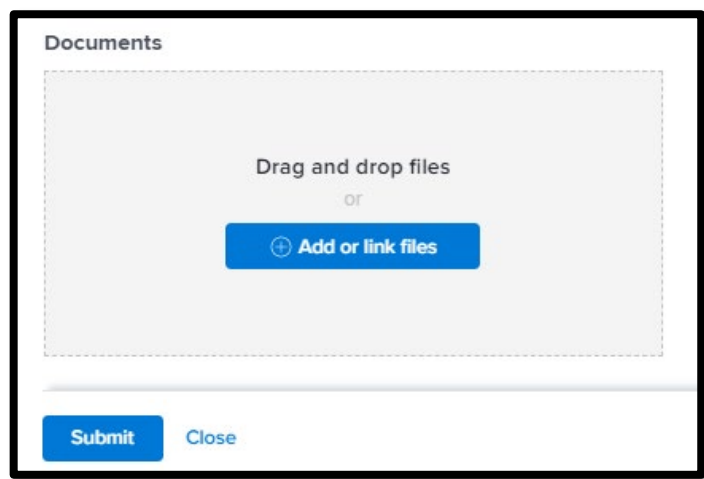
The template will allow you to enter the student(s)' information along with the amounts you are awarding.



You can add in student information, indicate the aid year, and include any special comments.



Once it's all filled out, please upload it in the Document section. That's it!



Tracking your request



When you submit your request, your ticket will arrive in our queue.

Our Fiscal Officer will verify the fund and FAU used to confirm the funding. This will be either the via BEA Journal/ID or via the ledger if the funds exist within the Financial Aid Office. Once Completed, they will update the Banner system with the new funding in the appropriate subcode.

If our Fiscal Officer has any questions, they will reach out to you via a WorkFront comment. Otherwise, no news is good news!

If this is a fund from which we have not awarded from, then the process will take a bit longer as we will have to work with the Accounting Office to create a subcode.

Once that part is done, our Scholarship Officer will be notified and will proceed with awarding.

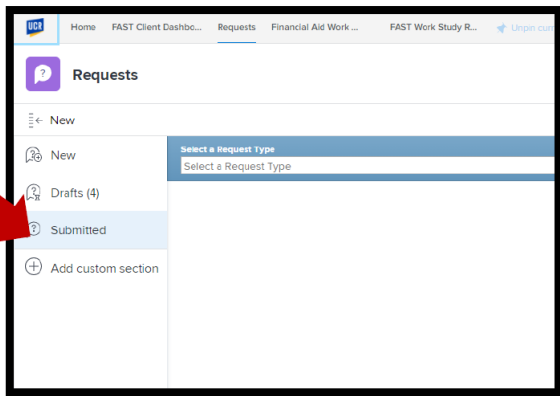
Because all recourses to student that are meant to cover educational costs much be coordinated into a student's current financial aid award, we must ensure that this new funding can "fit" into their cost of attendance (budget).

Our Scholarship Officer will review and if we are unable to award due to financial aid compliance reasons, we will communicate to the department/requestor via a WorkFront comment.

Once the awarding is done, you will be notified.

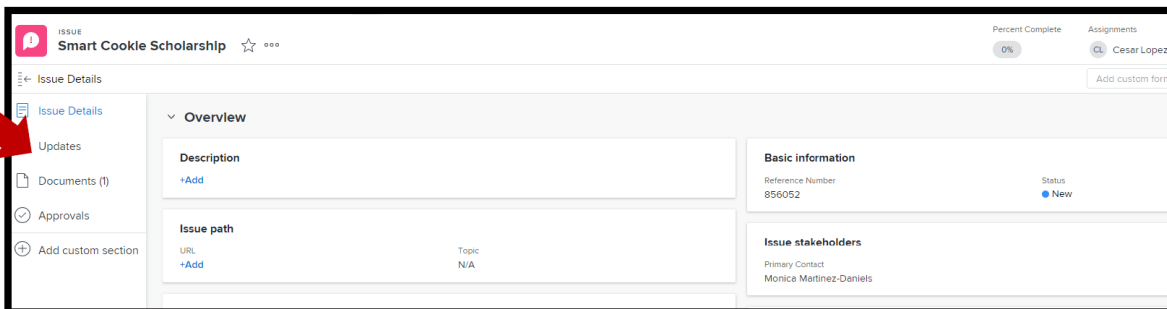
Communication During the Process

You can locate requests you have previously submitted by clicking on the "Submitted" tab on the left-hand side of the home page.

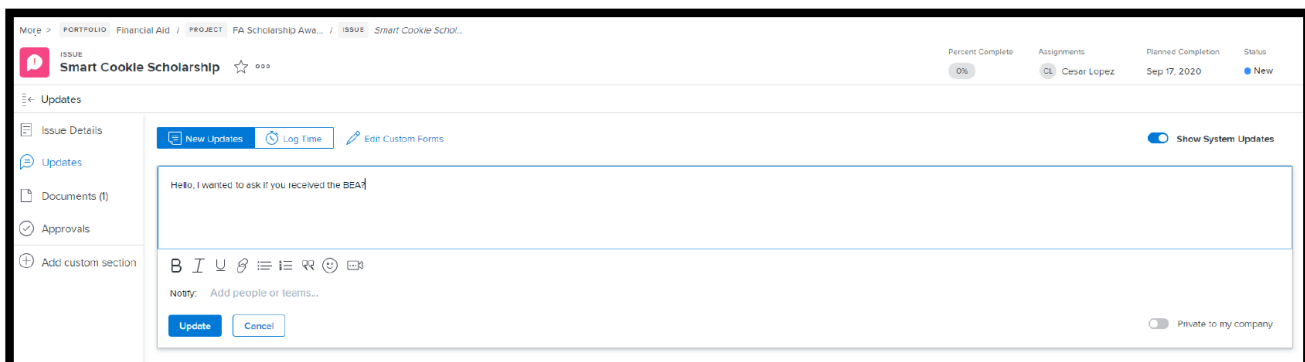


You will be able to see all the requests and click on each one individually and ask a question through the “Updates” section.

Name	Converted to	Path	Status	Entry Date	Last Update Date
FA Student Scholarship		FA Scholarship/Stipend Award Request	New	3/11/2021	3/11/2021
Plant Lady Scholarship	Plant Lady Scholarship	FA Scholarship Award Request	New	9/15/2020	11/12/2020
Smart Cookie Scholarship	Smart Cookie Scholarship	FA Scholarship Award Request	New	9/15/2020	11/12/2020



You can then add your question/comment by clicking on “New Update.”



WorkFront allows you to “tag” a staff member as part of a comment when you want them to be notified – similar to being CC’d in an e-mail.

The screenshot shows the 'Smart Cookie Scholarship' issue page in WorkFront. The left sidebar contains navigation links: 'Issue Details', 'Updates', 'Documents (1)', 'Approvals', and 'Add custom section'. The main content area is titled 'Updates' and includes buttons for 'New Updates', 'Log Time', and 'Edit Custom Forms'. A text input field contains the message: 'Hello, I wanted to ask if you received the BEA?'. Below this is a 'Notify:' field with a dropdown menu showing '@Cesar Lopez X' and '@Nino Barredo X'. A red circle highlights this dropdown menu. At the bottom of the form are 'Update' and 'Cancel' buttons, and a toggle for 'Private to my company'.

If you need assistance from the FA Team, we ask that you please leave a comment/question in the “Updates” section of the FA Scholarship Stipend Request and tag our FA team members. You can do this by typing the “@” and then the staff member’s name.

Conversely, if our FA Team needs clarification, they will also reach out by leaving a comment/question and tagging you.

If you needed assistance from a colleague in your department, please tag them in the “Updates” section after you’ve submitted your request so that they can view your inquiry and provide more information.

The screenshot shows the 'FA Student Scholarship' issue page in WorkFront. The left sidebar contains navigation links: 'Issue Details', 'Updates', 'Documents (1)', 'Approvals', and 'Add custom section'. The main content area is titled 'Updates' and includes buttons for 'New Updates', 'Log Time', and 'Edit Custom Forms'. A text input field contains the message: 'My coworker will provide the BEA. @Omar Faustino-Carreon'. Below this is a 'Notify:' field with a dropdown menu showing '@Omar Faustino-Carreon X'. At the bottom of the form are 'Update' and 'Cancel' buttons, and a toggle for 'Private to my company'. The bottom of the page shows a list of recent updates, including a comment from Monica Martinez Daniels.

All communication will then be recorded in this same thread.