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’s the last link in the “Tools” section.
Because of Single Sign On, you will automatically be logged in:
2. Submitting a request

Please only submit one scholarship/award per request. 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 in WorkFront, please use the drop down menu to look for the “FA Scholarship/Stipend Award Request.”

Once you select this option, you will see the request open.

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

Your name will automatically populate in the **primary contact** section as you are filling out the form.

You can skip/scroll past the Document section at this time. But you will come back to it soon.
The next section is labeled: "**Student Information.**" Here you’ll want to provide the students you are awarding through the linked Excel template.

Click on the link and you’ll automatically download the Scholarship Stipend Award Template. It should appear in your Downloads folder or at the bottom of your page if you’re using the Chrome browser.
The template will allow you to enter your 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 at the beginning of the request.

You’ll then need to include which organization you’re from – either a college or campus department.
In the next section, **Fund Information**, you’ll be asked to provide key information that we’ll need to verify the funding in order for us to process your request.

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

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

If you require assistance from another member of your organization, please submit the ticket and then in the comments section tag them in to help you with this request.

You can now click Submit!

**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 with either the BEA Journal ID and/or because the funds exist within the Financial Aid office. Once completed, they’ll 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 fund from which we have not awarded from, then the process will take a bit longer as we’ll have to work with the Accounting Office to create a subcode.

Once that part is done, our Scholarship Officer will be notified and will award.

Because all resources to students that are meant to cover educational costs must 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.

**Reviewing your requests**

You can locate requests you’ve submitted by clicking on the “Submitted” tab on the left hand side of the home page.
Then you’ll be able to see all of your requests. You can click into each request individually and ask a question through the Updates section.

You can 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 email.
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 leave a comment/question and tag you.

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

All communication will then be recorded in this same thread.