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

1. **Introduction to WorkFront**
   a. [How to access](#)

2. **Submitting a request**
   a. [Student Information Section](#)
   b. [Fund Information Section](#)

3. **Tracking your request**

4. **Communication during the process**
1. **Introduction to WorkFront**

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

Click on image for video link to open.

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a. **How to Access WorkFront**

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

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Scroll down and it will be the last link in the “Tools” section.
When you log in/create your account, you should see this:
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.
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.
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.

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.
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.

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.

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.

All communication will then be recorded in this same thread.