

FS4U Zoom Webinar

Summer 2020

June 23, 2020



FLORIDA STATE UNIVERSITY
FOUNDATION



Agenda

- Introduction
- Update on COVID-19 Scholarships
- Fund 599 Budgeting/Cash Impact
- Scholarship Deadlines
- Scholarship Workflow
- Monitoring Scholarships
- Post-Acceptance



Agenda

- FS4U Reporting
- Cycle Management
- Q&A Wrap-Up



Introduction

FS4U Project Website & Resources: foundation.fsu.edu/fs4u

- [Project Overview](#)
- [Resources](#)
 - FS4U Forms (Add/Update Users or Opportunities)
 - [Opportunity Administrator Contact List](#)
 - [Scholarship workflow](#)
 - Scholarship meeting/training session videos
- [Job Aids](#)
- [Frequently Asked Questions with Quick Access Menu](#)
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Update on COVID-19 Scholarships

- A few months ago, the Foundation allowed departments to establish new opportunities in FS4U during COVID-19 to bypass the post-acceptance application including the thank you letter requirement.
- This exception was granted as a means to expedite funds to students during the onset of the pandemic.
- Departmental scholarship opportunities set up in FS4U for COVID-19 are in the process of being closed and archived, and no new ones should be requested to be opened or cloned. **The only exceptions are main campus and Panama City relief funds.**
- Future scholarships should be issued to existing opportunities with the post-acceptance requirement.



Fund 599 Budgeting/Cash Impact

- Previous to FS4U, the Foundation would send scholarships for Fall to the University (typically in July) and then transfer cash a few days later. This was based off the old scholarship disbursement request form and ensured cash was transferred within the fiscal year the award was made.
- With the implementation of FS4U, scholarships follow an electronic workflow, and the Foundation transfers cash as scholarships are awarded within the system (once categorized as “Uploaded to FSU” in FS4U).
- As a result, some of you may experience budgeting impacts this first year if your award cycle was such that scholarships for both aid year 2019-20 and 2020-21 were awarded through FS4U prior to the end of the fiscal year.



Scholarship Deadlines

Important annual dates to remember:

- **February – Fall/Spring** - Financial Aid packages are created, which could include scholarships, waivers, grants, and loans.
- **July 1 – Fall/Spring** - Suggested deadline for scholarship applications from the departments to the FSU Foundation.
- **August 1 – Fall/Spring** - Suggested deadline for the receipt of scholarships by the Office of Financial Aid from the FSU Foundation. This ensures a scholarship will be considered before finalizing a student's financial aid award and prevents over awards.
- **April 15 – Summer** - Suggested deadline for the receipt of scholarships by the Office of Financial Aid from the FSU Foundation.
- **Financial Aid Early Disbursement** – 10 days prior to the start of classes.



Scholarship Deadlines

Financial Aid Over Awards:

- What is an over award? A financial aid over award occurs when a student has exceeded the federal limit of financial aid.
- If a scholarship is received from the Foundation after the suggested deadline, the student is reviewed for a potential over award. If the scholarship places the student in an over award status, other financial aid will have to be reduced and the student will be placed on accounts receivable to pay back the financial aid.

Example : Student is awarded a \$500.00 scholarship.

Student is over awarded \$500.00.

- The student's other aid will be reduced by \$500.00 and the student will be placed on accounts receivable for the over award of \$500.00. When the scholarship disburses, the A/R charge will be paid by the scholarship, and the student will not receive an immediate benefit from the scholarship.



Scholarship Deadlines

Expected Graduation Dates:

- Before awarding a scholarship, please be aware of the student's graduation date or expected graduation date.
- To check your student's graduation date, please refer to the FS4U portal.
- Foundation scholarships will not disburse if the term of the scholarship is greater than the graduation date or expected graduation date.

Example : Student is awarded a scholarship for the Fall 2020 term; however, student graduated Summer 2020 or has an expected graduation date on record as Summer 2020. The Fall 2020 scholarship will not load on the financial aid system.

- This will ultimately result in the student not being eligible for the scholarship or result in a delay in processing the scholarship.



Scholarship Deadlines

- While the process is different and unique for everyone, there are some consistent timeframes:
 - University applications and admissions decisions
 - Student decision deadlines
 - Financial Aid packaging and disbursements
 - Student data imports (~10/1 for Spring; ~ 3/1 for Summer; ~5/1 for Fall)
- Scholarships **are not** provided to Financial Aid for awarding to students until they are categorized as “Uploaded to FSU” in FS4U
- Administrators should monitor all awards they initiate to ensure they make it through the workflow by the required deadlines for timely disbursement



Scholarship Workflow

Scholarship Workflow in FS4U:

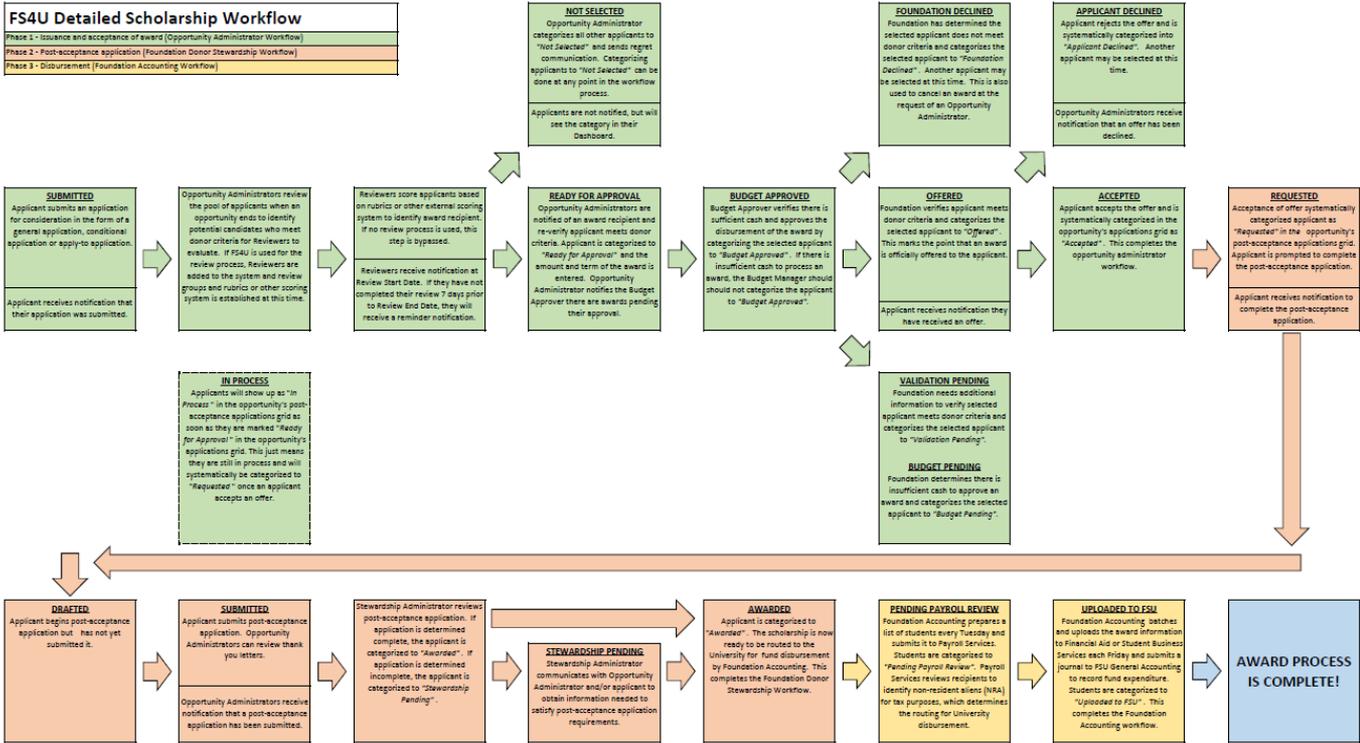
- Phase 1: Opportunity Administrator workflow
 - Issuance and acceptance of scholarship offer
 - Verify students have completed applications (general, conditional, apply-to) and meet criteria
 - Review of expected graduation date
- Phase 2: Foundation Donor Relations workflow
 - Post-acceptance application
- Phase 3: Foundation Accounting workflow
 - Scholarship transmittals uploaded to Financial Aid twice a week
 - File submitted to Controller's Office for disbursing cash once a week



Scholarship Workflow

FS4U Detailed Scholarship Workflow

- Phase 1 - Issuance and acceptance of award (Opportunity Administrator Workflow)
- Phase 2 - Post-acceptance application (Foundation Donor Stewardship Workflow)
- Phase 3 - Disbursement (Foundation Accounting Workflow)





Monitoring Scholarships

Phase 1: Opportunity Administrator workflow - *Issuance and acceptance of scholarship offer*

- Status of scholarship is monitored on the Applications grid of the opportunity until a student has accepted the offer (Category = Accepted)
- Categories identify the stage of the workflow that the scholarship is in as follows:
 - Drafted
 - Submitted
 - Ready for Approval
 - Not Selected
 - Budget Approved
 - Budget Pending
 - Offered
 - Validation Pending
 - Foundation Declined
 - Applicant Declined
 - Accepted
- Once a student accepts the offer, and the category changes to “Accepted”, refer to the Post-Acceptance grid of the opportunity for further updates on workflow



Monitoring Scholarships

Phase 2: Foundation Donor Relations workflow - *Post-acceptance application*

- Status of scholarship is monitored on the Post-Acceptance Applications grid of the opportunity once a student has accepted the offer
- Categories identify the stage of the workflow that the scholarship is in as follows:
 - In Process
 - Pending
 - Requested
 - Drafted
 - Submitted
 - Stewardship Pending
 - Awarded
 - Pending Payroll Review
 - Uploaded to FSU
 - Uploaded to FSU (Adjusted)
 - Returned to Foundation
- Once the scholarship category on the Post-Acceptance grid = Uploaded to FSU, administrators should contact Financial Aid regarding disbursement
- **This seems to be where the workflow stops as students fail to complete post-acceptance applications and administrators often are not monitoring**



Monitoring Scholarships

Opportunity vs. Post-Acceptance Applications:

Post-Acceptance Applications Grid

Opportunity Applications Grid

The screenshot displays the 'Award Management' interface. At the top, there are navigation tabs: 'Award Management', 'Site', 'Opportunity', and 'Stewardship'. A yellow banner below the tabs contains the message: 'The total amount offered for this opportunity exceeds the amount originally designated'. Below this, there are several tabs: 'Details', 'Questions', 'Qualification', 'Applications', 'Communications', 'Reviews', and 'Post-Acceptance'. The 'Applications' and 'Post-Acceptance' tabs are circled in red. Below the tabs, there is a search bar with the placeholder text 'Begin typing to search by name, email address, or user ID...'. At the bottom, there is a data grid with columns: 'Id', 'View', 'Award Mode', 'Category', 'Categori...', 'Primary Email', 'Email Aliases', 'Name', 'General ...', 'Conditio...', 'Reviewe...', 'Award Period', 'Amount ...', 'Qualifica...', 'Assigned...', 'Comple...', 'Encumb...', 'Encumb...', 'Renewal ...', 'Renewal ...', 'PERSONAL I...', 'VOLUNTARY...', 'THANK YOU ...', 'FINANCIALA...', and 'STUDENT IN...'. The grid shows a single row with a dropdown menu set to 'All' in the 'Category' column and another dropdown menu set to 'All' in the 'Award Period' column. The grid is titled 'Complete View' and shows '1-50 of 136' items on 'Page 1'.



Monitoring Scholarships

Opportunity Applications Grid Example:

<input type="checkbox"/>	Id	View	Award Mode	Category	Categorized At
<input type="checkbox"/>	<input type="text"/>			All	<input type="text"/>
<input type="checkbox"/>	706911	View	Award Mode	Submitted	06/02/2020
<input type="checkbox"/>	706910	View	Award Mode	Accepted	06/04/2020
<input type="checkbox"/>	706921	View	Award Mode	Offered	06/04/2020
<input type="checkbox"/>	706931	View	Award Mode	Accepted	06/04/2020
<input type="checkbox"/>	706920	View	Award Mode	Accepted	06/04/2020

Submitted – Student application has been received for consideration.

Offered – Student has been offered a scholarship.

Accepted – Student has accepted the offer on the scholarship side of the system. This starts the stewardship workflow for the Post-Acceptance Application so refer to Post-Acceptance Applications grid for further updates to scholarship workflow.



Monitoring Scholarships

Post-Acceptance Applications Grid Example:

<input type="checkbox"/>	View	Id	Category	Categorized At	Award Period
			All	06/10/2020	All
<input type="checkbox"/>	View	693656	Awarded	06/10/2020	Summer 2020
<input type="checkbox"/>	View	691343	Uploaded to FSU	06/10/2020	Fall 2020
<input type="checkbox"/>	View	689679	Awarded	06/10/2020	Fall 2020
<input type="checkbox"/>	View	686510	Awarded	06/10/2020	Summer 2020
<input type="checkbox"/>	View	685565	Uploaded to FSU	06/10/2020	Spring 2020
<input type="checkbox"/>	View	679685	Uploaded to FSU	06/10/2020	Fall 2020
<input type="checkbox"/>	View	679646	Uploaded to FSU	06/10/2020	Fall 2020
<input type="checkbox"/>	View	670306	Awarded	06/10/2020	Spring 2020
<input type="checkbox"/>	View	593927	Stewardship Pending	06/10/2020	Fall 2019
<input type="checkbox"/>	View	584854	Awarded	06/10/2020	Fall 2019

Awarded – Donor relations has approved the post-acceptance application. The scholarship will be submitted to Financial Aid in the next file.

Uploaded to FSU – The scholarship has been submitted to Financial Aid. Administrators should contact Financial Aid directly for disbursement status.

Stewardship Pending – Donor relations has reviewed the post-acceptance application and has an issue that requires the student's attention. Typically this is due to a thank you letter that is too short.



Post-Acceptance

Deadlines and Reminder Emails:

- Currently, there are no post-acceptance deadlines on any opportunities within FS4U. Why no deadlines?
 - As opportunities have different start/end dates, the post-acceptance deadlines would have to vary as well and be added manually for each opportunity.
 - If deadlines were added to post-acceptance applications, once the deadline has passed, the students would no longer be able to access their post-acceptance applications.
- Donor Relations sends reminder emails once approximately two weeks have gone by, and the student has not completed his/her post-acceptance application.



Post-Acceptance

Deadlines and Reminder Emails:

- When the first reminder email is sent to a student, Donor Relations will also send that students' name to the appropriate administrator to follow up with the student.
- Once the student has received the first reminder email, Donor Relations sends a reminder email every week until the students completes the post-acceptance application.



Post-Acceptance

Thank You Letters:

- There is not an option to upload a hard copy thank you letter into FS4U.
- In order to properly route the thank you letter through Donor Relations staff for review, administrators should direct students to copy/paste or type directly into the post-acceptance application.
- As a general rule, it is best not to accept a letter in any form (hard copy, email, etc.).
- Unless the post-acceptance application is submitted, the workflow stops and can delay a student from receiving their award in a timely manner.



FS4U Reporting (Foundation web report site)

Reports website: reports.foundation.fsu.edu

- **FS4U Processed Scholarships**
 - Provides a list of scholarships issued from FS4U once Uploaded to FSU
 - Parameters include: unit, department, OMNI Dept ID, fund code, year and semester
- **FS4U Scholarship Funds**
 - Provides a list of scholarship funds at the Foundation loaded in FS4U
- **Processed Scholarship**
 - Provides a list of scholarships issued from scholarship disbursement requests
 - Parameters include: unit, department, OMNI Dept ID, fund code, year and semester



FS4U Reporting (OMNI FI Query)

Monitoring Scholarship Disbursements:

- FI Query - FSU_CTRL_FDN_SCH_EXP_DTL (This query reflects the journal moving cash out of the Foundation fund and does not reflect the actual disbursement to the student.)

FSU_CTRL_FDN_SCH_EXP_DTL - Fund 599 Sch Expense Detail

Dept (%)

Project (%)

EMPLID (%)

Beginning Jmrl Date

Ending Jmrl Date

[View Results](#)

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (137 kb)

[View All](#)

First 1-100 of 458 [▶](#) Last

	Year	Period	Source	Journal ID	Date	Dept	Fund	Project	Account	EMPLID - BATCH - FS4U DR	Term	Amount
1	2020	7	FFS	0000320711	01/03/2020	203908	599	F00716	742201	100458849-6201-513292	2199	550.000
2	2020	7	FFS	0000320711	01/03/2020	114900	599	F00985	742201	200199846-6198-584522	2199	250.000
3	2020	7	FFS	0000320711	01/03/2020	114900	599	F01110	742201	200201408-6198-580026	2199	1750.000
4	2020	7	FFS	0000320711	01/03/2020	114900	599	F01127	742201	200490709-6198-584857	2199	500.000
5	2020	7	FFS	0000320711	01/03/2020	182900	599	F01753	742201	200297451-6198-580011	2199	1250.000



Cycle Management

- Annually with each new academic term, we go through a process called Cycle Management
- Changes to applications (general, conditional, apply-to) can and should be made at this time in preparation for the next year's award cycle
- Dates will automatically be set based on the current year award cycle
- Archiving will now be offset for 3 years
 - Allows more flexibility in awarding to reduce cloning
 - Maintains better system records for post-award changes or refunds
 - Ensures awards make it through the workflow reducing those that get stopped midway through the process (occurred last year)



Cycle Management

Cycle Management 2020 (*tentative schedule*):

Action Item	Deadline
Cycle management questionnaires/workbooks distributed	9/14
Cycle management questionnaires/workbooks due	9/25
Questionnaire follow up/aggregate system information	9/28 – 10/8
Close down FS4U and submit case to Blackbaud to initiate process	10/9
Complete cycle management survey	10/12 - 10/13
Blackbaud support team completes cycle management	10/14 - 10/23
Perform updates to opportunities and applications	10/26 – 11/6
Reopen FS4U	11/9



Q&A/Wrap-Up

Issuing Scholarship Awards:

- Foundation Accounting
- Help Desk Email Address: FS4U@foundation.fsu.edu

Post-Acceptance/Thank You Letters:

- Foundation Donor Relations
- Help Desk Email Address: donorrelations@foundation.fsu.edu

