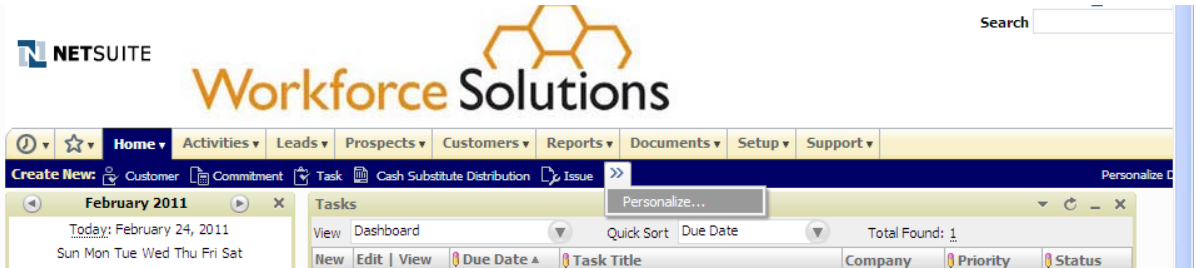


ADDING A SCHOLARSHIP TO THE REGISTRY IN FAMS

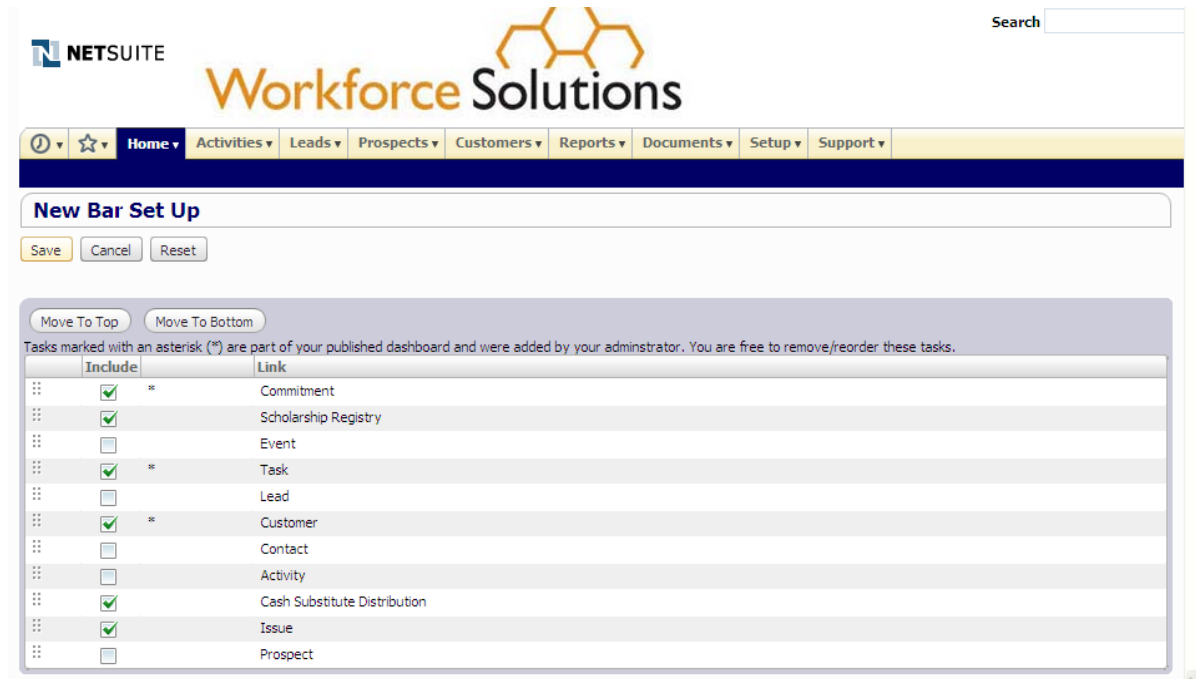
Staff assigned the role of *Career Office Manager* or *Commitment User* has permission to data enter scholarships in the Scholarship Registry.

Adding the Scholarship Registry Link to the “Create New” Bar

If the **Create New** bar on your Home Dashboard doesn't have **Scholarship Registry** on it you will need to add it.



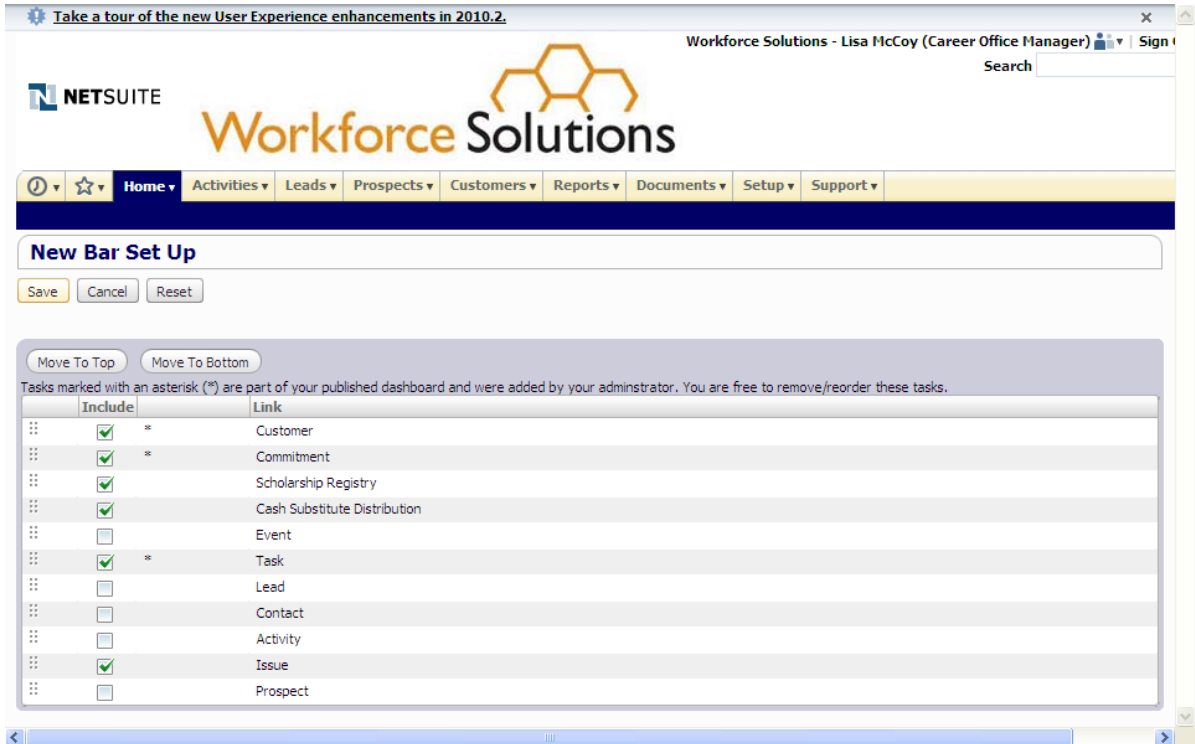
1. Roll your mouse over the double-arrow icon at the end of the bar and click on **Personalize...** The **New Bar Set Up** screen displays and links to records currently on the **Create New** bar are checked.



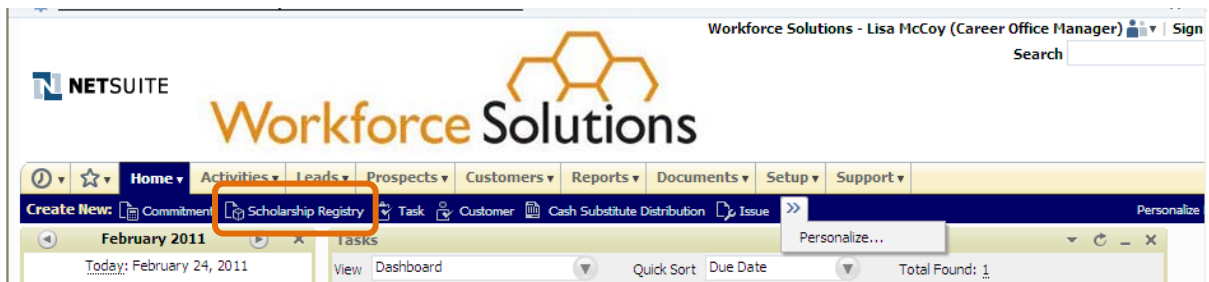
2. Click on the **Scholarship Registry** link.

ADDING A SCHOLARSHIP TO THE REGISTRY IN FAMS

- To rearrange the order in which the links appear on the **Create New** bar:
- Click on the row of the link you want to move. The mouse pointer will change to a cross with arrows. ↕
 - Click and hold the left mouse button while dragging the line to where you want it.
 - Repeat this step to rearrange the links in an order logical to you.



- Click **Save**. This returns you to the Dashboard.



ADDING A SCHOLARSHIP TO THE REGISTRY IN FAMS

Adding a Customer to the Scholarship Registry

Note: Before you create a new customer, perform a customer look-up by SSN (with and without “-”) and by Name.

The screenshot shows the Netsuite Workforce Solutions interface. The top navigation bar includes Home, Activities, Leads, Prospects, Customers, Reports, Documents, Setup, and Support. The main content area displays the 'Customer: Testy Tester' record. A 'Create New' dropdown menu is open, showing options like Commitment, Cash Substitute Distribution, Issue, and Scholarship Registry (highlighted with an orange box). The customer's information is displayed on the right, including Name, SSN, Birth Date, Sex, and various demographic checkboxes.

1. Retrieve or create the customer record to create a new Scholarship Registry from the customer record
2. From the **Create New** bar, click on **Scholarship Registry**. The **New Scholarship Registry** screen displays with the customer's information (ID, Name, SSN, and Address), Entity Status ("Registered" is the status assigned by FAMS for any customer who has passed the requirements to be on the registry), and Career Office populated.

The screenshot shows the 'New Scholarship Registry' form. The form is populated with customer information and includes fields for Registry #, Customer ID, SSN, Entity Status, Date, Priority Level, Career Office, and various dates. The form is divided into sections: Primary Information, Classification, and a bottom navigation bar with tabs for Items, Billing, Relationships, Custom, and Communication.

ADDING A SCHOLARSHIP TO THE REGISTRY IN FAMS

3. Enter **Funding Stream, Alternates, Occupation, Planned Vendor, and Planned Start Date.**
4. Under the **Items** tab (see screen shot below), add a single **Item** to reflect the amount of scholarship requested with description, quantity, and rate.

Primary Information

Registry # To Be Generated	*Date 2/24/2011		Subtotal 0.00
*Customer ID Testy Tester	Priority Level		Total 0.00
Customer SSN 999-99-9999	*Career Office H-GAC		
Name	Career Office Location HGAC		
*Entity Status Registered	Planned Start Date 6/6/2011		
In Recoup <input type="checkbox"/>	Planned School/Vendor Lone Star College System		
	CareerOffice Memo RN training		

Classification

*Funding Stream WIA : Dislocated Worker	*Occupation Registered Nurses	Letter Sent <input type="checkbox"/>
Alternate Fund Stream 1 WIA : Adult	System Term. Date 2/23/2013	Letter Sent Date
Alternate Fund Stream 2	*Exp. Close Date 4/30/2011	Response Due Date
Alternate Fund Stream 3	Reason to Close	FAPO Notes

Items | Billing | Relationships | Custom | Communication

Add Multiple | Clear All Lines

*Item	Description	Quantity	Rate	Amount
Education Support : Tuition : Scholarship-Occupational Scho. Occ.	Master's RN	1	18000.00	18000.00

Add | Copy Previous | Insert | Remove | Cancel

Save | Cancel | Auto Fill | Reset | More Actions

Letter Sent, Letter Sent Date, Expected Close Date, Response Due Date, and FAPO Notes are for use by the Financial Aid Payment Office (FAPO) only.

ADDING A SCHOLARSHIP TO THE REGISTRY IN FAMS

5. Enter Comments or Notes to document any changes:
 - a. Click on the **Communication** tab.
 - b. Click on the **User Notes** sub-tab.
 - c. Click on **New Note**.
 - d. Enter a **Title** for the Note/Memo.
 - e. Enter the **Type**: Always select Note.
 - f. Enter the note/details in the **Memo** box.
 - g. Click **Save**. The **New Note** window closes.

The screenshot displays the FAMS system interface. On the left, the 'Registry # 100-17' is shown, along with fields for Customer ID (Testy Tester), Customer SSN (999-99-9999), Name, Entity Status (Registered), and In Recoup. Below this is the 'Classification' section with Funding Stream (WIA : Dislocated Worker) and Alternate Fund Stream 1 (WIA : Adult). The 'Communication' tab is selected, and the 'User Notes' sub-tab is active. A 'New Note' dialog box is open, showing fields for Title (Multi Semester course), Date (2/24/2011), Type (Note), Time (6:12 pm), and Memo (Customer would like to attend school for 4 semesters). The dialog box has 'Save' and 'Cancel' buttons. Below the dialog box, a table with columns #, Date, Author, Title, Memo, Direction, and Type is visible, currently showing 'No records to show.' The 'Save' button is highlighted in the bottom left corner of the dialog box.

6. Click **Save** from the **New Scholarship Registry** screen. The Scholarship Registry is now in "Open" status and the customer is on the registry list.

Create one Scholarship Registry for each semester the customer wants assistance.

ADDING A SCHOLARSHIP TO THE REGISTRY IN FAMS

Updating the Registry Status When Letters are Sent

When a call-in letter is sent to a customer from the Scholarship Registry, FAPO checks the **Letter Sent** checkbox and updates the **Response Due Date** and **Letter Sent Date** fields.

Edit Scholarship Registry: 100-17 (Testy Tester)

Save Cancel Reset More Actions

Primary Information

Registry # 100-17 *Date 2/24/2011
*Customer ID Testy Tester Priority Level
Customer SSN 999-99-9999 *Career Office H-GAC
Name Career Office Location HGAC
*Entity Status Registered Planned Start Date 6/6/2011
In Recoup Planned School/Vendor Lone Star College System
CareerOffice Memo RN training

Subtotal 18000.00
Total 18000.00

Classification

*Funding Stream WIA : Dislocated Worker *Occupation Registered Nurses Letter Sent
Alternate Fund Stream 1 WIA : Adult System Term. Date 2/23/2013 Letter Sent Date
Alternate Fund Stream 2 *Exp. Close Date 4/30/2011 Response Due Date
Alternate Fund Stream 3 Reason to Close FAPO Notes

When the customer comes to a career office in response to the letter, and he or she is not eligible or is no longer interested:

1. From the customer's record, choose the **Sales** tab and the **Transactions** sub-tab.
2. Click on the **date of the Registry record**.
3. Click on **Edit**.
4. From the **Reason to Close** dropdown, choose **Pending Eligibility**.
5. Change the **Reason to Close** to one of the following:
 - **Alternate Funding** – the customer does not need the scholarship because she has another way of paying for school.
 - **Not Eligible**
 - **Not Interested** – customer decided not to attend school.
 - **Training Completed** – customer has already finished her education.
6. Click **Save**. When the **Expires Date** passes, the record will automatically close and the status will change to **Closed**. If the customer does not contact Workforce Solutions, or her letter is returned, FAPO updates this field.

ADDING A SCHOLARSHIP TO THE REGISTRY IN FAMS

Creating a Commitment from the Scholarship Registry

When a customer comes to a career office in response to the letter, and you are ready to fund:

1. Open the **Registry Record**.
2. From the customer record, choose the **Sales** tab and the **Transactions** sub-tab.
3. Click on the date of the **Scholarship Registry** you want to open.
4. The **Registry Record** screen displays.

The screenshot displays the NetSuite Workforce Solutions interface. At the top, there is a search bar and navigation tabs including Home, Activities, Leads, Prospects, Customers, Reports, Documents, Setup, and Support. The main header shows 'Scholarship Registry: 100-17 (Testy Tester)' with a status of 'Open'. Below this, there are buttons for Edit, Back, Commitment, Cash Substitute Distribution, and More Actions. The 'Primary Information' section contains fields for Registry # (100-17), Customer ID (Testy, Tester), Customer SSN (999-99-9999), Name, Entity Status (Registered), In Recoup (checkbox), Date (2/24/2011), Priority Level, Career Office (H-GAC), Career Office Location (HGAC), Planned Start Date (6/6/2011), Planned School/Vendor (Lone Star College System), and Career Office Memo (RN training). A summary box shows Subtotal 18,000.00 and Total 18,000.00. The 'Classification' section includes Funding Stream (WIA: Dislocated Worker), Occupation (Registered Nurses), System Term. Date (2/23/2013), Exp. Close Date (4/30/2011), Reason to Close, Letter Sent (checkbox), Letter Sent Date, Response Due Date, and FAPO Notes. At the bottom, there is a table with columns Item, Description, Quantity, Rate, Amount, and History. The table contains one row: 'Education Support : Tuition : Scholarship-Occupational Scho. Occ.' with a quantity of 1, a rate of 18,000.00, and an amount of 18,000.00. Below the table are buttons for Edit, Back, Commitment, Cash Substitute Distribution, and More Actions.

ADDING A SCHOLARSHIP TO THE REGISTRY IN FAMS

- Click on the **Commitment** button to create a new commitment. The **Commitment Record** displays all information carried over from the Registry.

The screenshot shows the 'New Commitment' form in the Workforce Solutions system. The form is titled 'New Commitment' and includes a search bar and navigation tabs. The main form area is divided into sections: 'Primary Information' and 'Classification'. In the 'Primary Information' section, the 'Date' is 2/28/2011, 'Name' is Testy Tester, and 'Customer SSN' is 999-99-9999. The 'Classification' section shows 'Funding Stream' as WIA - Dislocated Worker and 'Occupation' as Registered Nurses. A table at the bottom of the form shows an item for 'Education Support - Tuition - Scholarship-Occupational Scho. Occ.' with a quantity of 1 and a unit rate of 0.00. A red box highlights the 'Occupation' field.

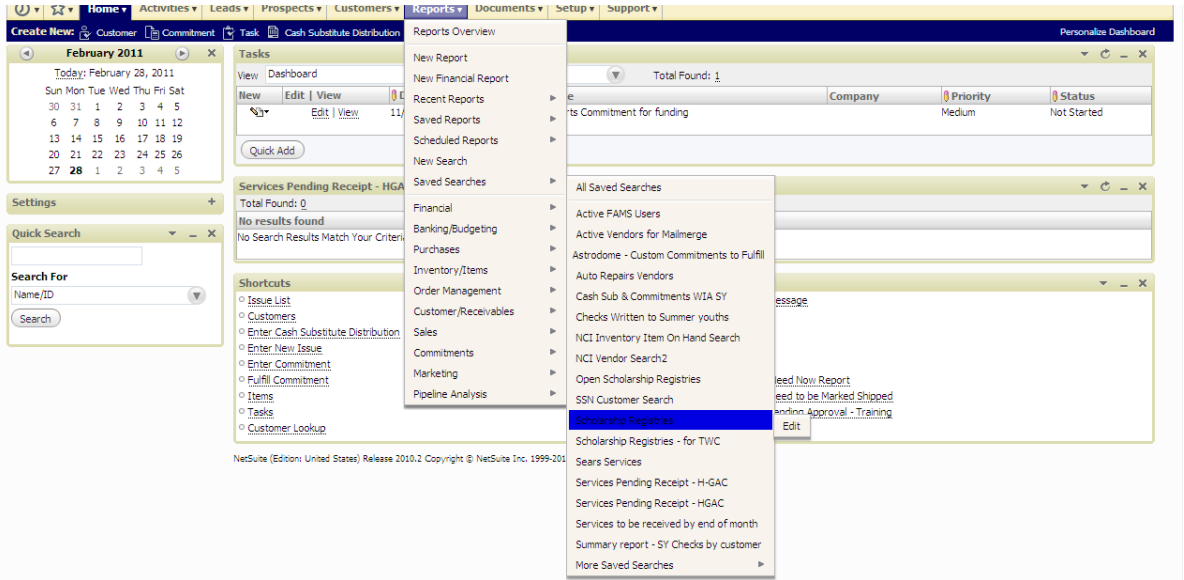
- Complete/change any information for the commitment following the steps for entering a commitment.
- You may need to add commitments to indicate when funds are expected to be needed.
- Click **Save**. The new commitment is created, indicating it was created from the **Scholarship Registry**.

The screenshot shows the 'Commitment Record' for 'Commitment: 100-721 (Testy Tester)'. The record shows the same information as the 'New Commitment' form, but with a status of 'Pending Approval'. The 'Classification' section shows 'Funding Stream' as WIA - Adult and 'Payment Option' as Voucher. The table at the bottom shows the same item as the 'New Commitment' form.

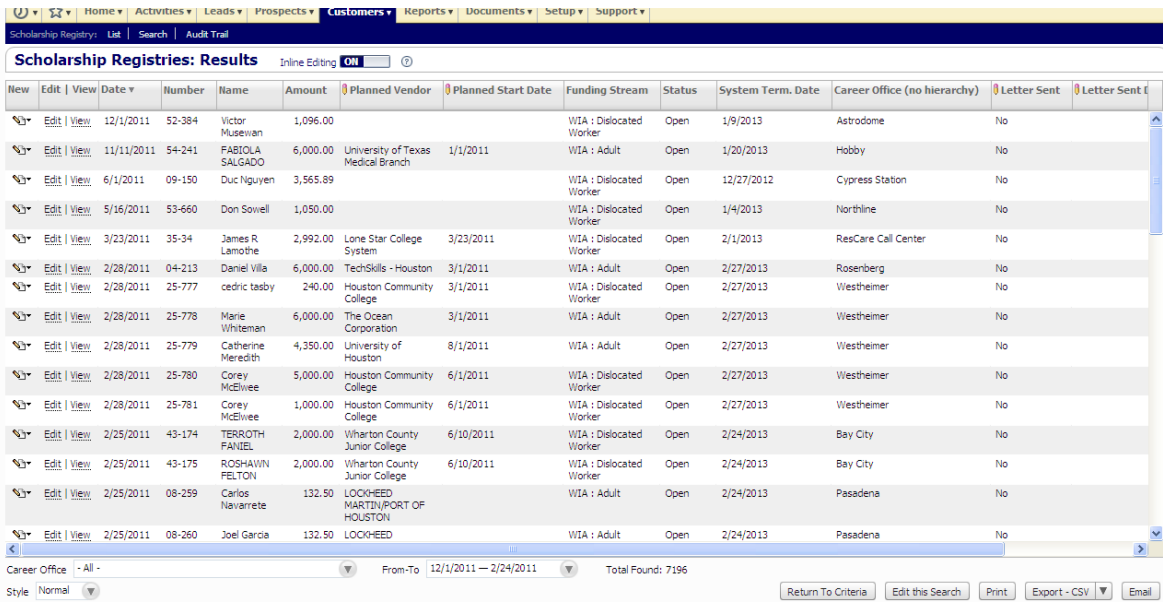
ADDING A SCHOLARSHIP TO THE REGISTRY IN FAMS

Viewing the List of Scholarship Registries

1. Roll your mouse over the **Reports** tab.
2. Roll your mouse over **Saved Searches**.



3. Click on **Scholarship Registries**. The **Scholarship Registries: Results** screen displays.



4. Customize the view by choosing your career office and/or a date range.

ADDING A SCHOLARSHIP TO THE REGISTRY IN FAMS

Requesting a Change in the Funding Stream

The Financial Aid Payment Office sends a letter to a customer from the registry when funding becomes available in any of the fund streams listed on the customer's Scholarship Registry entry in FAMS, *primary* and *alternate*. FAPO sends the Career Office a list of customers eligible for a specific funding stream who will receive a call-in letter because that fund has money available. FAPO tells the career office the date they will send the letter. Career office staff must check the customers on the list to determine that the customer remains eligible for the open fund stream. If the customer is not eligible for that fund stream, but remains eligible for others, the career office will send FAPO an issue in FAMS to request modification of the customer's registry record. Modification includes removing the fund stream for which the customer is ineligible and identifying new primary and alternate funding streams. Follow the same procedure if you determine the customer ineligible for the open fund stream after she receives a letter and you talk to her.

1. Create a new issue using Subject: **Scholarship Registry—Fund Stream Change**
2. Make entries in all required fields indicated by asterisk (number, incident time, status and entered by are auto populated)
 - a. Customer Name
 - b. Priority
 - c. Type: **Scholarship Registry**
 - d. Assigned to: **Funds Analysts**
 - e. Message: Include **Scholarship Registry Number**
3. Click **Save**.

The screenshot displays the NetSuite Workforce Solutions interface for creating a new issue. The browser address bar shows the URL: https://system.netsuite.com/app/crm/support/supportcase.n?sticky=LISTSEARCH_9029. The page title is "Issue - NetSuite (Workforce Solutions)".

The "New Issue" form contains the following fields and values:

- * Subject: Scholarship Registry--Fund Stream
- Priority: Low
- Number: To Be Generated
- Type: Scholarship Registry
- * Incident Time: 3:43 pm
- Assigned To (FAPO Staff): Funds Analysts
- Inactive:
- Copy/Email Staff: <Type & tab for single value>
- * Customer ID: Test Dubbs
- * Status: Pending
- * Entered By: Charlotta(Denise) Goins

The "Interactions" section is expanded, showing a message:

Message: Customer is ineligible for WIA Adult. Please update the primary fund stream to WIA Youth In School. Scholarship Registry #56-1160

A red arrow points to the "Interactions" section. The "Reply" area is visible, showing a "Formatted Text (HTML Source Code)" toolbar with options for Font, Size, Color, Bold, Italic, Underline, Bulleted List, Numbered List, Indent, and Outdent.

ADDING A SCHOLARSHIP TO THE REGISTRY IN FAMS

Scholarship Registry Entry Before Fund Stream Update Request

This screenshot shows a NetSuite interface for a scholarship registry entry. The entry is titled "Scholarship Registry: 56-1160 (Test Dubbs)" and has a status of "Open". The primary information includes a registry number of 56-1160, a customer ID of "Test Dubbs", and a date of 1/15/2011. The funding stream is "WIA : Adult", and the occupation is "Registered Nurses". The letter sent checkbox is checked. The classification section shows "WIA : Youth In School" as an alternate fund stream 1, with a system term date of 4/14/2013. The items table shows one item: "Occupational Skills Training : Tuition" with a quantity of 1, a rate of 4,000.00, and an amount of 4,000.00. Red arrows point to the "WIA : Adult" and "WIA : Youth In School" fields.

Confirmation: Transaction successfully Saved

Scholarship Registry: 56-1160 (Test Dubbs) Status: Open

Primary Information

Registry # 56-1160 Date 1/15/2011 Subtotal 4,000.00
Customer ID Test Dubbs Priority Level Total 4,000.00
Customer SSN xxx-xx-xxxx Career Office H-GAC : Financial Aid Office
Name Career Office Location Financial Aid Office
Entity Status Registered Planned Start Date 11/20/2011
In Recoup Planned School/Vendor Houston Community College
CareerOffice Memo

Classification

Funding Stream WIA : Adult Occupation Registered Nurses Letter Sent
Alternate Fund Stream 1 WIA : Youth In School System Term. Date 4/14/2013 Letter Sent Date 3/31/2011
Alternate Fund Stream 2 Reason to Close Response Due Date 4/15/2011
Alternate Fund Stream 3 FAPO Notes

Item	Description	Quantity	Rate	Amount	History
Occupational Skills Training : Tuition	ASSOCIATE DEGREE NURSING	1	4,000.00	4,000.00	History

Scholarship Registry Entry After Fund Stream Update Request

This screenshot shows the same NetSuite interface for the scholarship registry entry after a fund stream update. The entry is titled "Scholarship Registry: 56-1160 (Test Dubbs)" and has a status of "Open". The primary information is the same as in the previous screenshot. However, the funding stream is now "WIA : Youth In School", and the letter sent checkbox is unchecked. The classification section shows "WIA : Youth In School" as the funding stream, with a system term date of 4/14/2013. The items table is the same. Red arrows point to the "WIA : Youth In School" and "Letter Sent" fields.

Take a tour of the new User Experience enhancements in 2010.2.

Workforce Solutions - Charlotta(Denise) Goins (Financial Aid Office - Search

NETSUITE Workforce Solutions

Scholarship Registry: List Search

Scholarship Registry: 56-1160 (Test Dubbs) Status: Open

Primary Information

Registry # 56-1160 Date 1/15/2011 Subtotal 4,000.00
Customer ID Test Dubbs Priority Level Total 4,000.00
Customer SSN xxx-xx-xxxx Career Office H-GAC : Financial Aid Office
Name Career Office Location Financial Aid Office
Entity Status Registered Planned Start Date 11/20/2011
In Recoup Planned School/Vendor Houston Community College
CareerOffice Memo

Classification

Funding Stream WIA : Youth In School Occupation Registered Nurses Letter Sent
Alternate Fund Stream 1 System Term. Date 4/14/2013 Letter Sent Date
Alternate Fund Stream 2 Reason to Close Response Due Date
Alternate Fund Stream 3 FAPO Notes

ADDING A SCHOLARSHIP TO THE REGISTRY IN FAMS

The Funds Commitment Specialist/Funds Analyst updates the funding stream and edits the Scholarship Registry entry following these steps:

1. Remove the ineligible **Funding Stream**.
2. Enter a new fund stream in the **Primary Funding Stream** section (as requested by Career Office) and remove it from the **Alternate Fund Stream** section if it is entered there.
3. Uncheck the **Letter Sent** box.
4. Document the reason for the funding stream update in **Communication -User Notes**.

Screenshot of the Scholarship Registry - NetSuite (Workforce Solutions) interface. The page shows 'Primary Information' and 'Classification' sections. The 'Classification' section includes 'Funding Stream: WIA : Youth In School', 'Occupation: Registered Nurses', and 'Letter Sent' checkbox. The 'Communication' tab is active, showing a 'User Notes' section with a table of messages. A red arrow points to the 'Letter Sent' checkbox, and another red arrow points to the 'User Notes' section. A third red arrow points to the 'Primary Fund Stream Update' message in the table.

#	Date	Author	Title	Memo	Direction	Type
1	4/18/2011 1:35 pm	Charlotta (Denise) Goins	Primary Fund Stream Update	Per issue#99-xxxx career office has determined the customer is no longer eligible for the selected primary fund stream (WIA Adult). FA has updated primary fund stream to WIA Youth In School.		

5. Change the **Issue Status** to **Completed**.
6. Note in the **Issue Reply** section the funding stream was updated as requested.
7. Click **Save**.

ADDING A SCHOLARSHIP TO THE REGISTRY IN FAMS

Confirmation: Issue successfully Saved

Issue: 13025 Scholarship Registry--Fund Stream Change (Test Dubbs)

Subject: Scholarship Registry--Fund Stream Change
Number: 13025
Incident Time: 3:43 pm
Created Date: 4/21/2011 3:51 pm
Inactive:
Entered By: Charlotta(Denise) Goins

Customer ID: Test Dubbs
Status: Completed
Priority: Low
Type: Scholarship Registry
Assigned To (FAPO Staff): Funds Analysts

Interactions

Messages (2)

Email Attach Refresh View History Customize View

View Case Default

#	View	Date	Author	Message	Email Sent	Recipient	Cc	Files
1	View	4/21/2011 3:51 pm	Test Dubbs	Customer is ineligible for WIA Adult. Please update the primary fund stream to WIA Youth In School. Scholarship Registry #56-1160	No			No
2	View	4/21/2011 3:53 pm	Charlotta(Denise) Goins	Scholarship registry fund stream has been updated to WIA Youth In School as requested.	No			No

Activities (0)