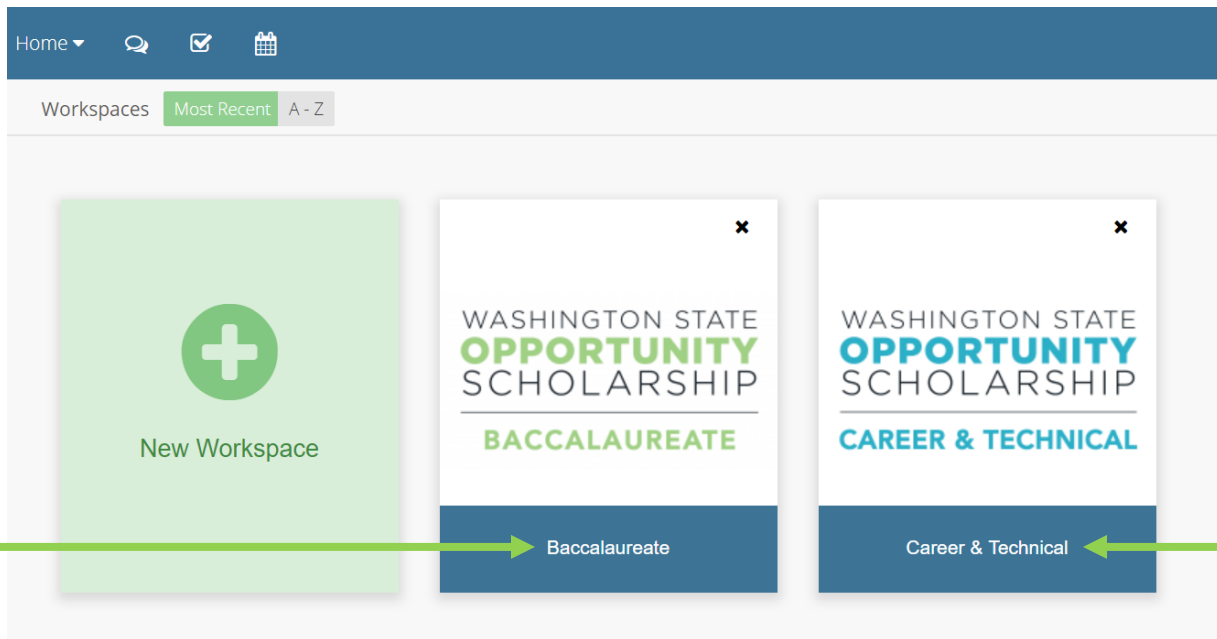


WSOS School Portal Instructions

The School Portal can be accessed [here](#).

When you log in to the School Portal you will first be presented with the following screen:



For the Career and Technical Scholarship (CTS) disbursement roster, click on the “Career & Technical” button.

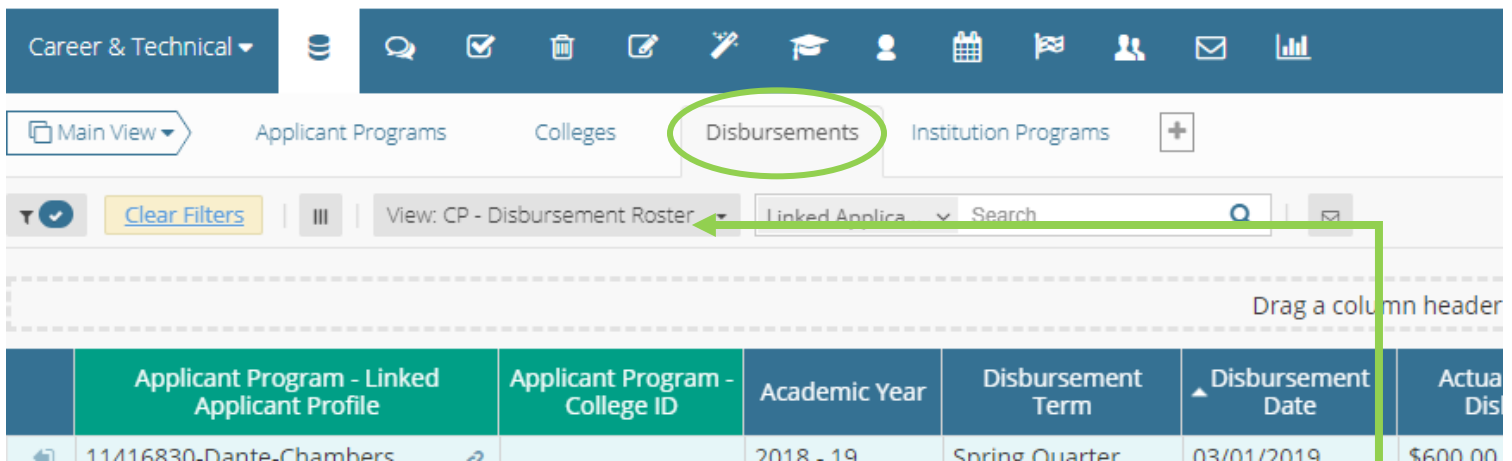
For the Baccalaureate Scholarship disbursement roster, click on the “Baccalaureate” button.

Each button will take you to the corresponding workspace. Each workspace houses comprehensive disbursement data for all scholars receiving that specific award at your institution. You will not find data about Baccalaureate Scholars in the Career & Technical workspace and vice versa.

Not all users will have access to both workspaces. If you are missing access to the workspace you need access to, please email: awards@waopportunityscholarship.org

Disbursement Roster

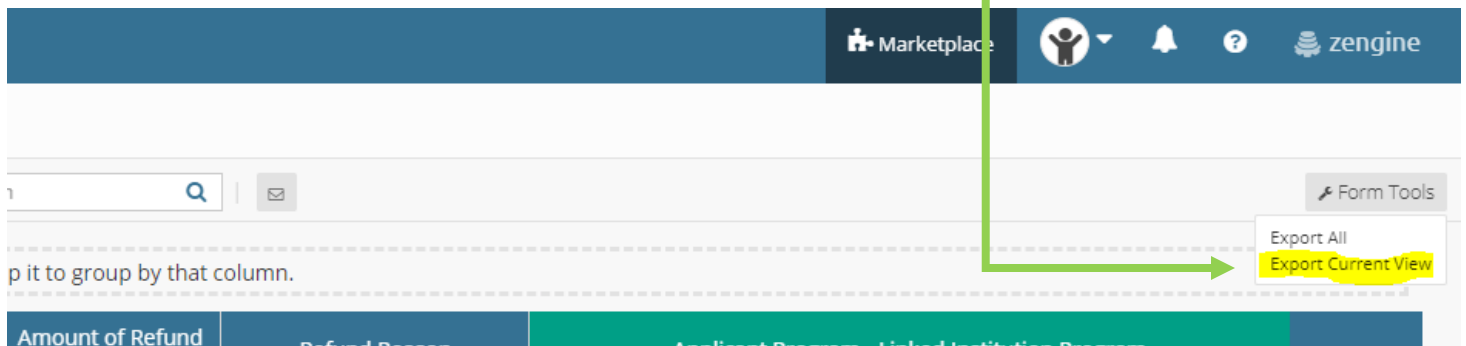
Once you enter the appropriate workspace, click on the **Disbursements** form:



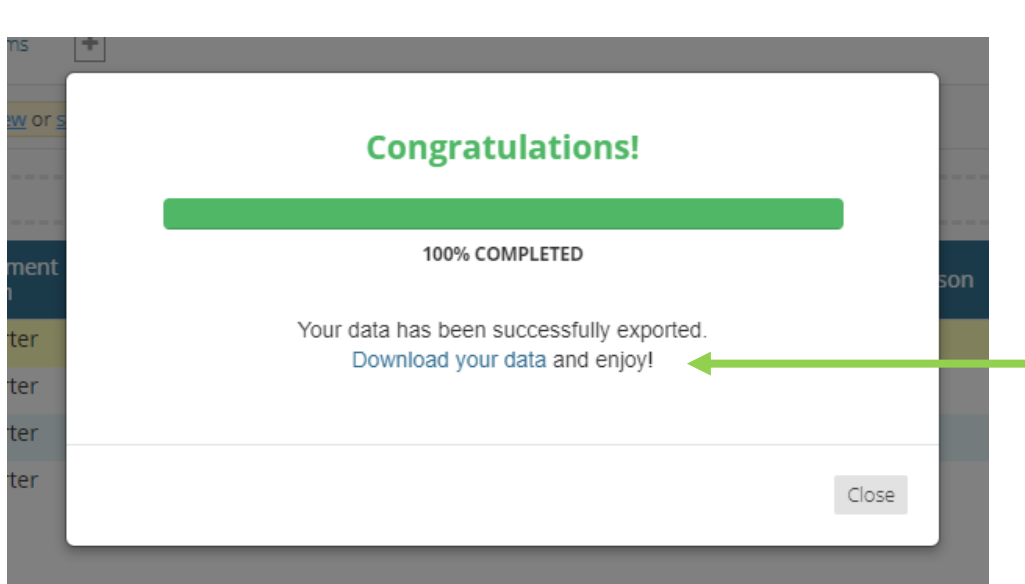
Then, to access the current disbursement roster, set your view to: **CP – Disbursement Roster**

The CP – Disbursement Roster view contains all the information you need to process an incoming disbursement.

To Export: If you need to export the disbursement roster you can do so by clicking **Export Current View** under the **Form Tools** button on the top right side of the screen.



It may take a couple minutes for your data to export. Once the export is complete, click **Download your data**.



Refunds

If you identify any refunds that need to be issued to WSOS:

1. Export the disbursement roster per the instructions above.
2. Fill the **Amount of Refund Owed** column with the amount you will return to WSOS for the identified student.
3. Fill the **Refund Reason** column with one of the standard refund reasons.

Example:

| A | B | C | D | E | F | G | H |
|--------------------------------|-----------|------------|-----------------|------------|---------------|-----------------------|---------------------|
| Applicant Programs - Linked Ap | Applicant | Academic Y | Disbursement Te | Disburseme | Actual Amount | Amount Of Refund Owed | Refund Reason |
| 11416841-Rebekah-Rodriguez | | 2018 - 19 | Spring Quarter | 3/1/2019 | 800 | 400 | 1/2 Time Enrollment |
| 11416830-Dante-Chambers | | 2018 - 19 | Spring Quarter | 3/1/2019 | 600 | 600 | Not meeting SAP |
| 11416827-Chantilly-Tubo | | 2018 - 19 | Spring Quarter | 3/1/2019 | 600 | | |

Once all relevant cells have been filled in, mail the filled, exported worksheet along with the refund check to WA STEM and e-mail a copy of the filled, exported worksheet to awards@waopportunityscholarship.org. If you have refunds for CTS and Baccalaureate scholars, send a separate refund check and worksheet for each.

CTS Only- Program Reporting

In addition to any refunds, CTCs might identify some program discrepancies that need to be reported to WSOS.

Because Career and Technical scholars' awards are based on their program, it's extremely important that WSOS keep an updated record of all scholars' programs of enrollment. As part of the disbursement process, please verify each scholar's program of enrollment by reviewing the "Applicant Program – Linked Institution Program" column. If the program recorded for any student differs from your institution's records, please report that information to WSOS by completing the following process:

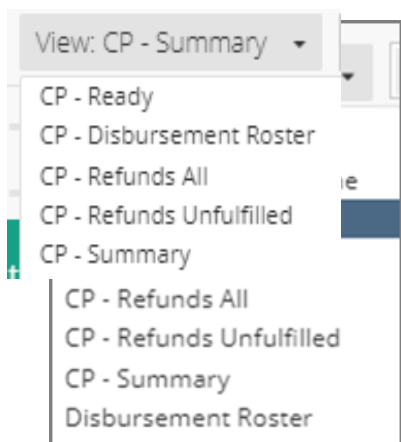
1. Export the disbursement roster per the instructions above. If any refunds were identified, this information should be filled in on the same exported spreadsheet.
2. In the next empty column: Fill in the actual program of enrollment, CIP Code and credential type for any scholar whose records differ.
3. If a scholar is not enrolled in a program at your institution, please write "No program of enrollment"

Example:

| G | H | I | J |
|-----------------------|------------------|--|--------------------------------------|
| Amount Of Refund Owed | Refund Reason | Applicant Programs - Linked Institution Program - Name | |
| 400 | 1/2 Time Enrollm | Clark College-T-TEN Automotive-Associate of Applied Technology | Cisco Technician 15.0305 Certificate |
| 600 | Not meeting SA | Clark College-HiTecc Automotive Technician-Certificate | |
| | | Clark College-T-TEN Automotive-Certificate | |

Disbursement Views

In addition to using the School Portal to access disbursement rosters, you can use the portal to access a wide range of information about the money that has been sent between WSOS and your institution. You can use the view menu to filter for the information you're interested in. Views that begin with "CP" (where CP stands for "College Partner") have been designed to be most helpful to financial aid staff. Any views that do not start with "CP" are used by WSOS staff and are subject to be altered at any time. Changing your view will not change any data in the portal, it will only change the way you are viewing the data.



CP-Ready = All disbursements ready to be allocated to students' accounts. Money for these disbursements has not been sent yet. You can reference the "Disbursement Target Date" column for the date these funds will be sent.

CP-Disbursement Roster = All money that has already been disbursed for the current academic year (no pending funds shown).

CP-Refunds All = Any disbursement record that has an associated refund. These may be filled or unfulfilled refund requests.

CP-Refunds Unfulfilled = Refunds that are owed from your institution to WSOS (Outstanding Refund Requests)

CP-Summary = All disbursements for the current academic year.