

## College Partner Portal

### Overview

The College Partner Portal is WSOS' online platform for our financial aid partners to view and process scholarship funding for scholarship recipients. Each of our partner institutions has at least one staff member with access to the database, to make scholarship processing more efficient. College partners will only be able to view student data for scholarship recipients at their institution.

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## Accessing the College Partner Portal

Partners can access the College Partner Portal on our [website](#). They will need to reset their password the first time that they log in by clicking on the "Forgot Password?" link.

## College Partner Portal

For optimal user experience, do not use Apple Safari web browser to log in.

**Welcome to the new College Partners' Portal!**

If this is your first time logging into the new portal, click [Forgot Password?](#) to get access.

Questions? Reach out to us at [awards@waopportunityscholarship.org](mailto:awards@waopportunityscholarship.org)!

Email

Password

[Forgot password?](#)

**LOGIN**

Institutions can add additional staff members as users at any time by emailing the Awards Department.

# Navigating the College Partner Portal

## Overview

Once logged in, the first page that partners will see is the “Summary” page. This page includes information for every student (past and present) who has received funding from WSOS at their institution. They can use the fields at the top to filter for the disbursement data they are looking for.

## College Partner Portal

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Summary | Disbursed | Pending Disbursements | Refund Requests | Logout

### Summary

Use the fields below to filter disbursement data

College Student ID  First Name  Last Name  Date of Birth  Academic Year  Term  Scholarship

**SEARCH**

[Download Data](#)

College Student ID	Last Four SSN	Institution Name	Scholarship	First Name	Last Name	Date of Birth	Academic Year	Disbursement Term	Disbursement T
000000000			BaS	Test	Test		2020-21	Fall Quarter	

If they want to see further information about a specific disbursement, they can click on “View Details” on the right-hand side.

## College Partner Portal

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Scholarship

Disbursement Term	Disbursement Target Date	Disbursement Date	Actual Net Disbursement	Amount Outstanding	Amount Refunded	Refund Reason	<a href="#">View Details</a>
Fall Quarter	8/14/2020						

# Viewing Individual Disbursements

## College Partner Portal

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Report

### Disbursement Details

Disbursements ID	[REDACTED]
Institution Name	[REDACTED]
Academic Year	2020-21
Disbursement Term	Fall Quarter
Amount Anticipated For Disbursement	\$500.00
Disbursement Target Date	8/14/2020
Anticipated Net Disbursement	\$500.00
Disbursement Date	
Actual Amount Disbursed	
Actual Net Disbursement	
Notes	Test disbursement record. Ignore.

### Refund Details

Amount Of Refund Owed	
Actual Amount Refunded	
Refund Reason	
Refund Date	
Amount Outstanding	

### Scholar Details

Scholar WSOS ID	[REDACTED]
College Student ID	<input type="text" value="00000000"/>
Scholarship Program Type	BaS
First Name	Test
Last Name	Test
Date of Birth	[REDACTED]
Last Four SSN	

UPDATE

BACK

Within each disbursement, partners can view the amount of funding the student is expected to receive, as well as the date that the funding is expected to be sent out ("Amount Anticipated For Disbursement" and "Disbursement Target Date"). Once the funding has been sent to their institution, WSOS will update the fields "Disbursement Date" and "Actual Amount Disbursed."

Users can also view each Scholar's identifying information, such as Date of Birth, Last Four SSN, and College Student ID. College partners can update students' College ID numbers on this page by typing within the field and clicking "Update" at the bottom. Large batches of College IDs can be imported in bulk by sending over the spreadsheet of IDs to the Awards Team.

## Overview of Data Pages

The following pages can be found by using the navigation bar at the top of the portal:

**Summary** – All scholarship recipients (past and present), including any future disbursements that have been scheduled for the current academic year.

**Disbursed** – All scholarship recipients (past and present). This page only includes disbursements that have already been made, and not any future disbursements that are scheduled.

**Pending Disbursements** – This page only contains future disbursements that are currently scheduled for the academic year, but have not been sent to the partner’s institution.

**Refund Requests** – Refunds that are owed from the partner’s institution to WSOS.

## Processing Disbursements

Navigate to the “Disbursed” page. Filter for the relevant term and academic year (ex. “Fall Quarter” and “2020-2021”). If needed, the disbursement roster can be exported in CSV format by clicking “Download Data” on the left side of the page.

### College Partner Portal

For optimal user experience, do not use Apple Safari web browser to log in.

Summary | **Disbursed** | Pending Disbursements | Refund Requests | Logout

**Disbursed**

College Student ID      First Name      Last Name      Date of Birth      Academic Year      Term      Scholarship ?

                       2020-21      Fall Quarter      Select

[Download Data](#)

College Student ID	Last Four SSN	Institution Name	Scholarship	First Name	Last Name	Date of Birth	Academic Year	Disbursement Term	Disbursement D
000000000			BaS	Test	Test		2020-21	Fall Quarter	

## Processing Refunds

If students are not eligible for funding for any reason, a refund should be issued to WSOS. In order to issue a refund:

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

Once all relevant cells have been filled in, mail the filled, exported worksheet along with the refund check to our office and email a copy of the worksheet to the Awards Team.

Please send a separate refund check for each scholarship program (Baccalaureate Scholarship and Career and Technical Scholarship) and a separate worksheet for each.