



## QUICK FACT – REPORTS IN PORTAL

- \* **Transaction Details**    Date range driven  
Deposits, check numbers, allocation given, checks sent to schools, lists funded, funds returned by school when a youth does not attend.
  - Award Date-----List and date entered
  - Payment Received-----Credit Card "CC" or Check #
  - Deceased individual-----Name
  - Earnings Alloc-----Year of allocation
  - Expired Recipients-----Recipients who did not use their funds.
  
- \* **Assigned Summary**    Fiscal year driven (FY 2020 = 08/01/2019 – 07/31/2020)  
Displays total assigned amount for the year and lists entered and disbursements taken by a youth.
  
- \* **Expiring Recipients**  
List of youth who are reaching expiration. This report can be used to contact the youth, encouraging them to use their funds.
  
- \* **Recipient Details**    Fiscal year driven (FY 2020 = 08/01/2019 – 07/31/2020)  
Name, contact info, USBC ID, balance in their account, expired recipients and college disbursements
  
- \* **Scholarship Summary**  
List of all funded and unfunded scholarships with amount and posted date.
  
- \* **Unfunded Amounts**  
Quick view of unfunded lists.
  
- \* **PDFs**  
Displays two years of Assigned Summary and Recipient Details reports.