KANSAS STATE UNIVERSITY

Scholarship Administrator Instructions

If you do not already have access to the K-State Scholarship Network (KSN), please complete the KSN Access form and return it to iTAC (Nancy Becker) who will either grant or deny access. The form can be obtained by visiting the Foundation's website at https://ksufoundation.org/financials/KSN%20Access%20Form-081621.pdf or by contacting the K-State Foundation Compliance Team at ksn@ksufoundation.org to obtain a copy of the form.

Please note that the Student Financial Assistance office requires documentation of FERPA training being completed before access to KSN is granted. Please contact SFA if you have not yet completed the FERPA training.

If there has been any change in staffing and you need to access KSN, please complete the form and submit it to iTAC

Responsibilities of Scholarship Administrators may include:

- Assist/collaborate with the University and College to communicate scholarship opportunities to students.
- Establish review committees within KSN (if applicable) and provide review committee members instructions (e.g. how to evaluate financial need, merit, leadership, work ethic, character, etc.)
- Review qualifications and applicant pool within KSN.
- Award scholarships to students in KSN.

The following instructions provide guidance for using the KSN tool to review and award scholarships to students.

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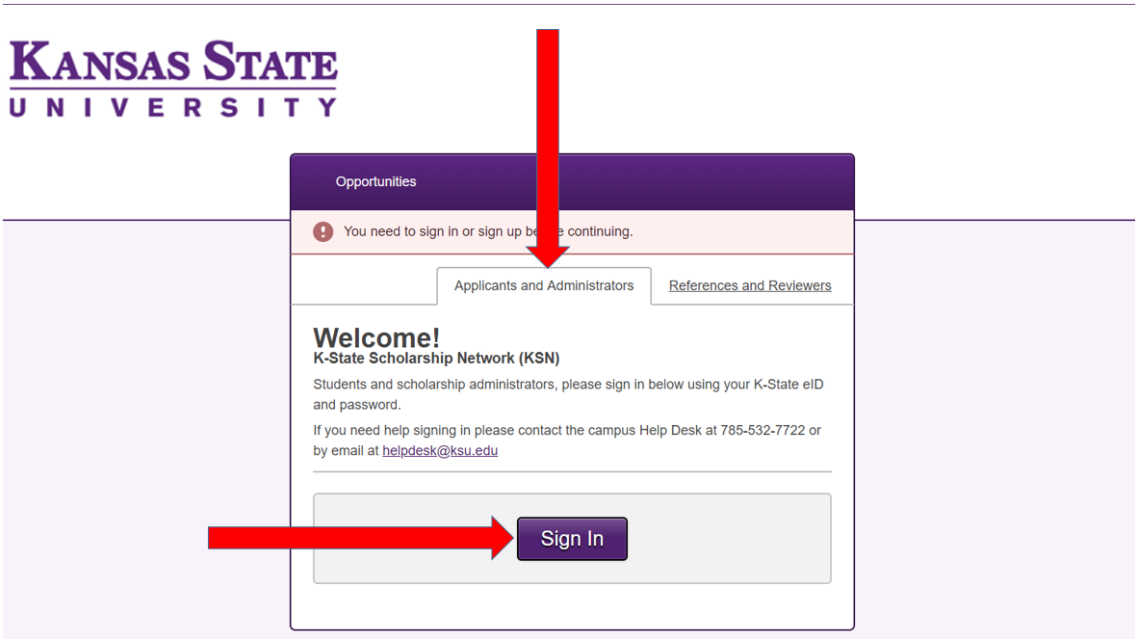
Logging into KSN

1-Login to KSN as an "Administrator" by signing in to KSN at https://k-state.academicworks.com/ using your K-State eID and password.



2-Enter your user name and password. Click the "Sign in" button.

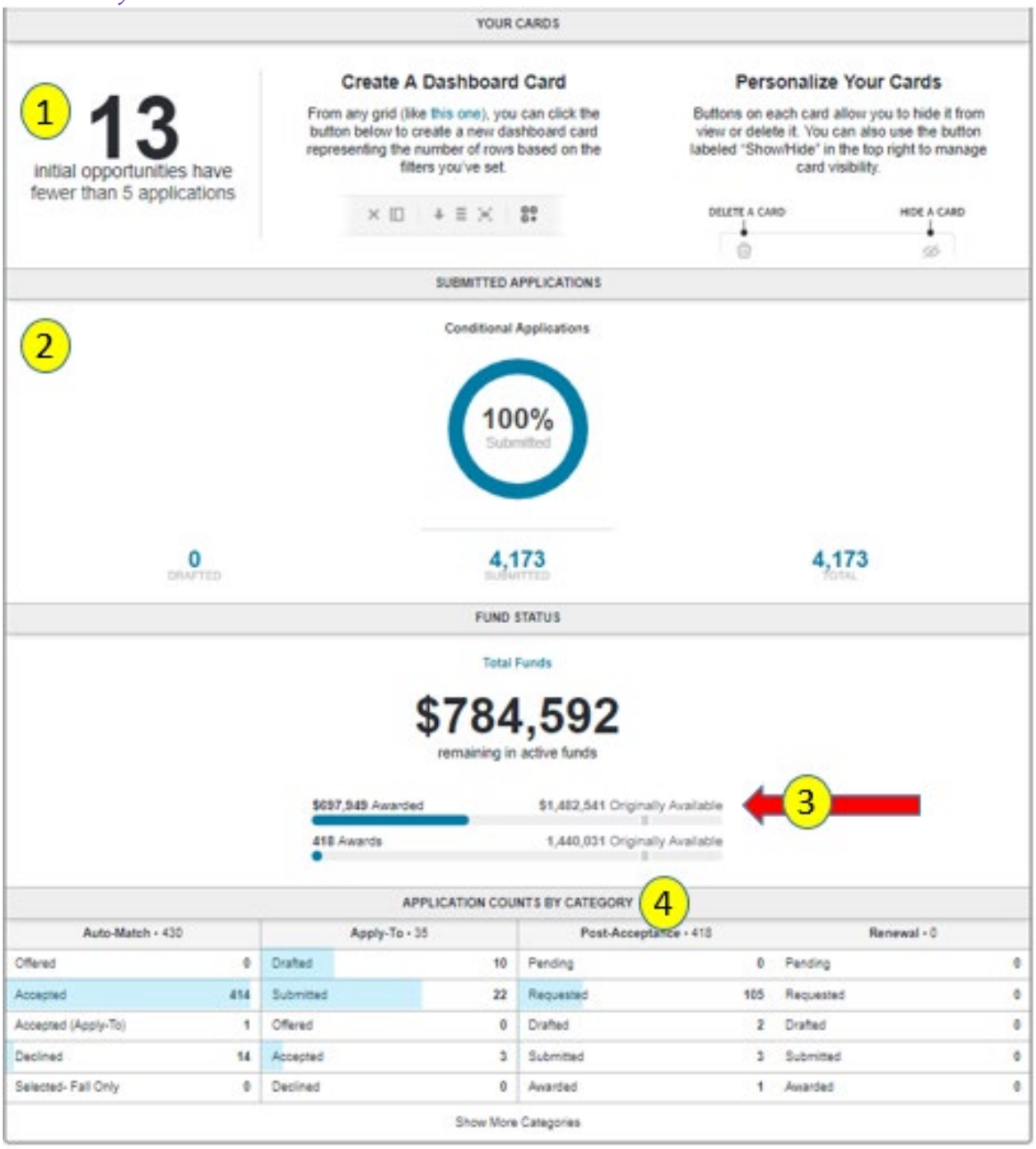
3-If you do not remember your password, please contact the IT Help Desk to reset your password.

4-If you have multiple roles in KSN, make sure you are logged in as an "Administrator" by hovering over your name and clicking on the "Administrator" role.

Interpreting the Dashboard

The dashboard provides you with an overview of how many applications you are receiving and which scholarship may need extra attention.

Note: your view of the dashboard may be different than the screenshot below depending on how you customize your view.



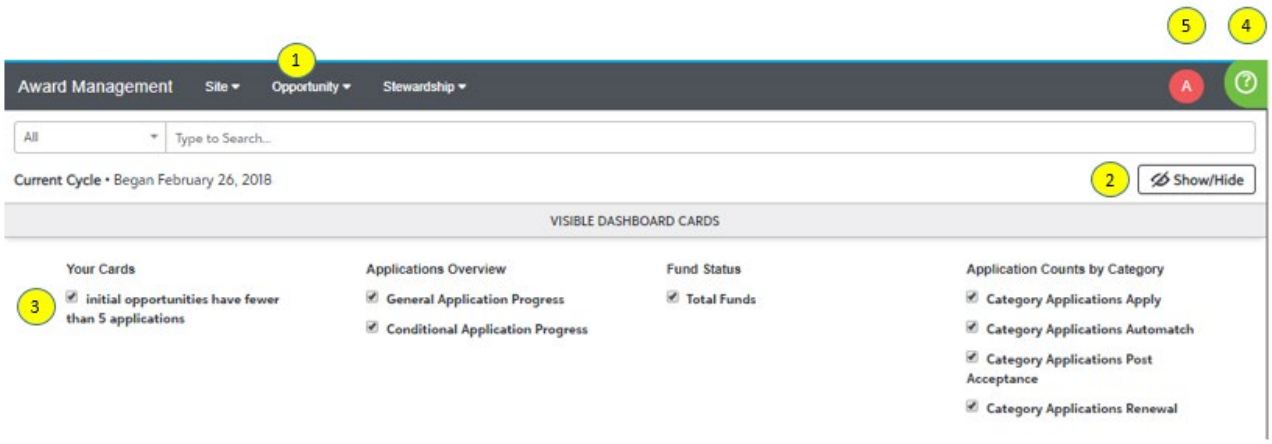
1-This will show you a grid of opportunities that have less than 5 applications.

Note: this includes all qualified applications.

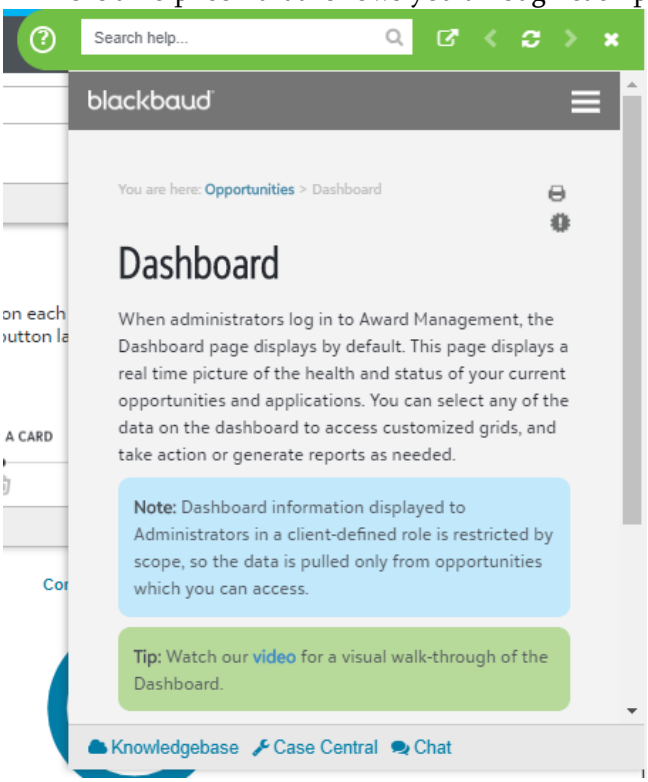
2-This will show the number of conditional applications drafted or submitted for your college or department if you are using conditional application to capture additional answers from your students. Keep in mind, all students will initially start in the submitted category.

3-This shows the total amount available for funding and the number of awards available for your scholarships.

4-This will show you an overview of your total number of scholarship applications broken down by category.



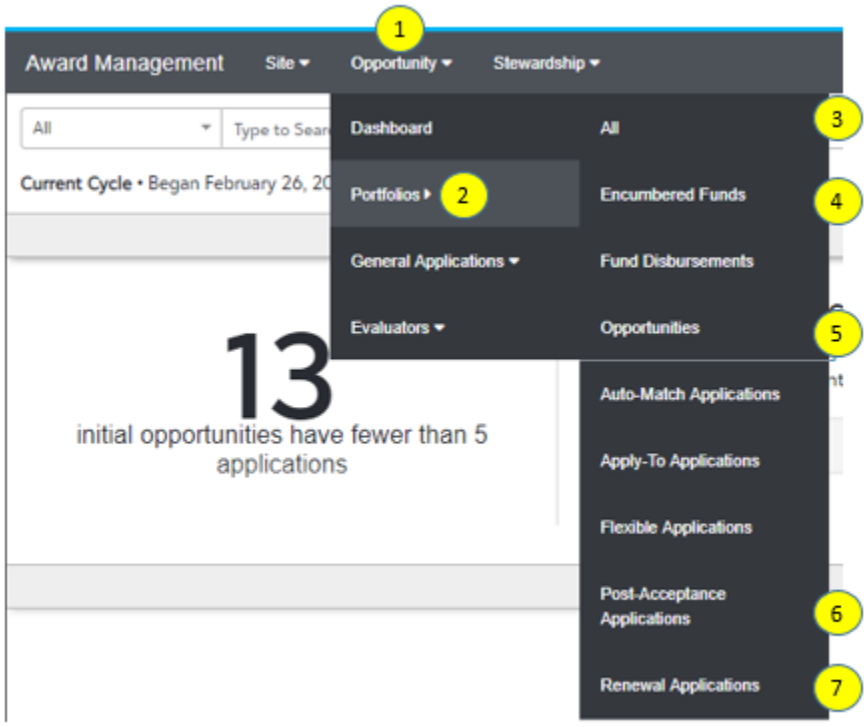
1-To get back to your dashboard, click on “opportunity” and click “Dashboard”.
2-Click show/Hide to customize your dashboard.
3-Check or uncheck any items that you would like to add or remove from your dashboard.
4-This is a help icon that follows you through each page.



Note: you may not see a definition for all pages you are viewing.

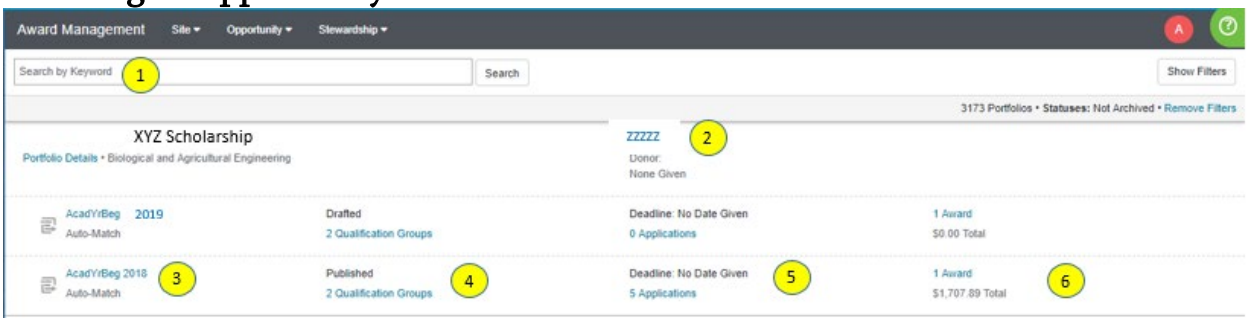
5-This reveals your name and various roles.

Opportunity Tab



1-Clicking on the "opportunity" tab will reveal various options including access to reports and opportunities.
2-Click "Portfolios" to be presented with additional options.
3-Click "All" to see all of your opportunities.
4-The "Encumbered Funds" reports will shows all awards for your scholarships.
Note: You can use the "Award Period, Categorized At, Category along with plenty other columns to filter your grid".
5-Clicking on "Opportunities" will provide a grid view of all your opportunities.
6-Clicking on "Post-Acceptance" will provide a grid view of post-acceptance applications.
7-Clicking on "Renewal Applications" will provide a grid view of renewal applications.

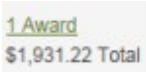
Selecting an opportunity



1-The "Search" bar allows you to search by either the fund number, fund name or a keyword.
2-Displays your fund number.
3-Clicking on the current application cycle will provide you a view of the details tab, questions, qualifications, applications, etc.
Note: Make sure you are clicking on the correct cycle.

4-Clicking on

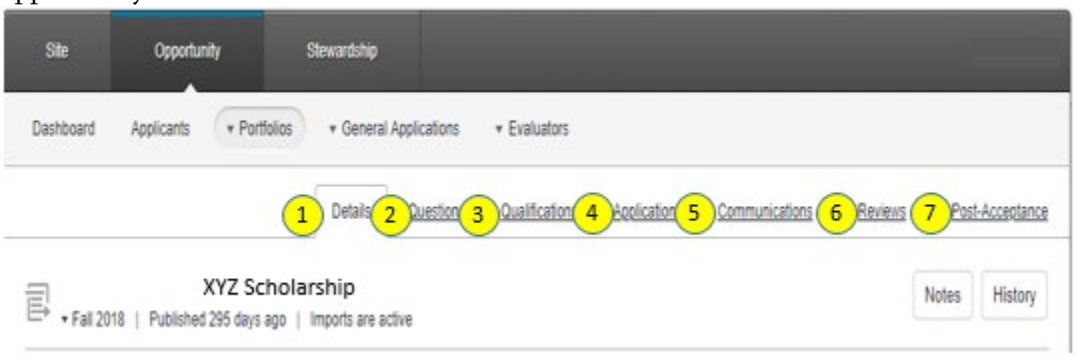
provides your funds criteria/qualifications.

6-Clicking on 

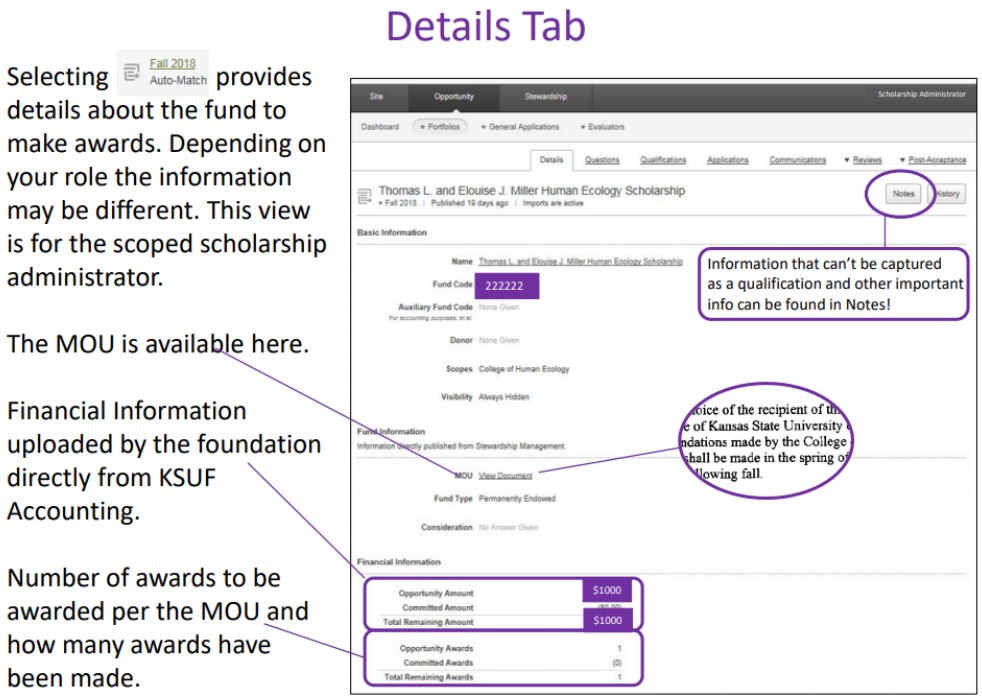
provides who has been encumbered/selected for the scholarship along with the total amount available for awarding.

Viewing the opportunity details

When you click on the current application cycle, you will see more detailed information about the opportunity.

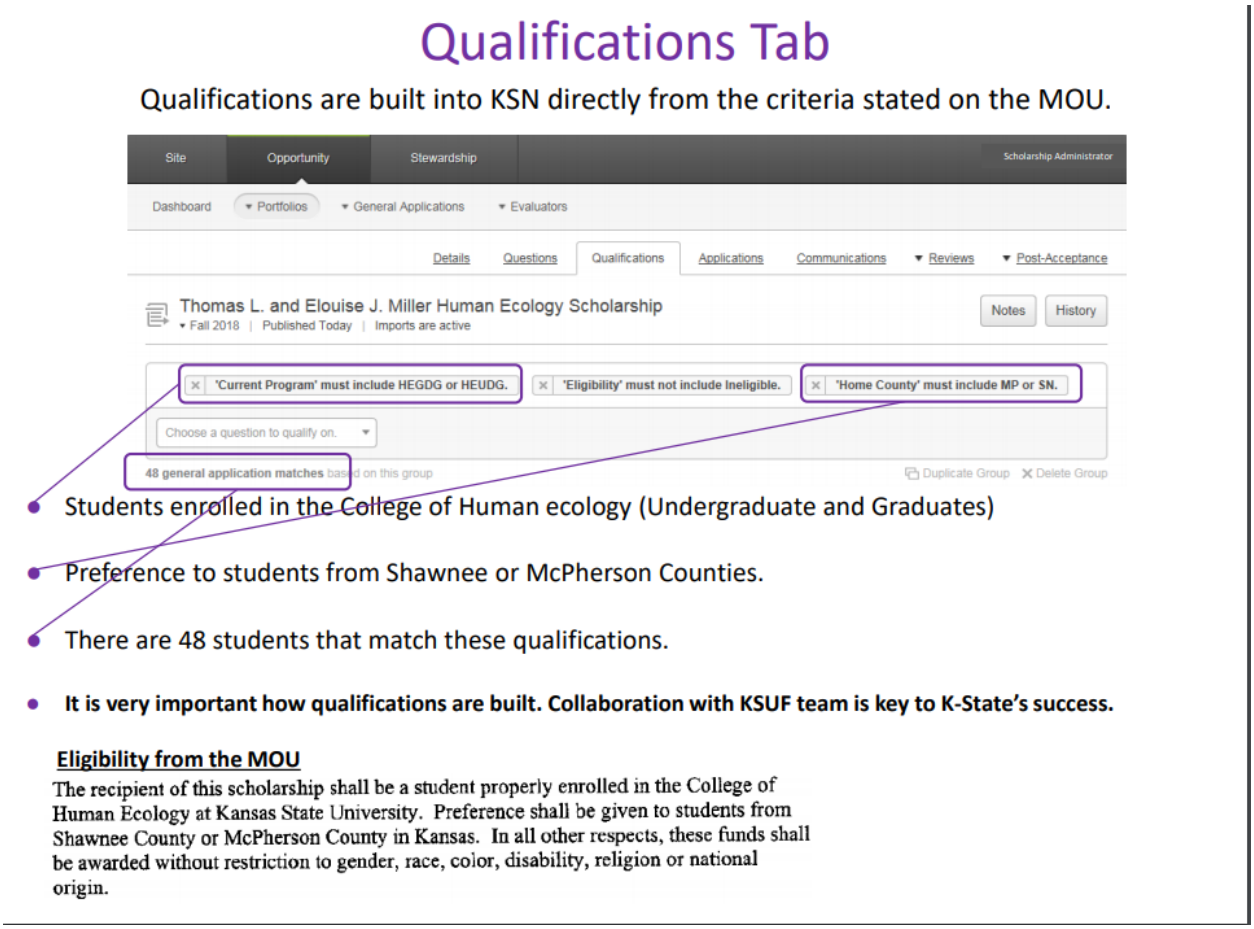


1-The "Details" tab includes the fund name, fund number, scope (college/department), the MOU (should be reviewed before awards are made), fund type, consideration (this is to alert you that the MOU calls for things such as leadership, work ethic, drive, etc. since these are unmeasurable), opportunity amount (amount available for awarding), opportunity awards, etc.



2-The "Questions" tab provides you with questions that the applicant will need to answer (if applicable).

3-The “Qualifications” tab shows qualifications/criteria for the opportunity. These are based off the MOU which reflects the donor’s intent.



Note: students do not see qualifications.

4-The “Applications” tab shows a view of the applicant grid.

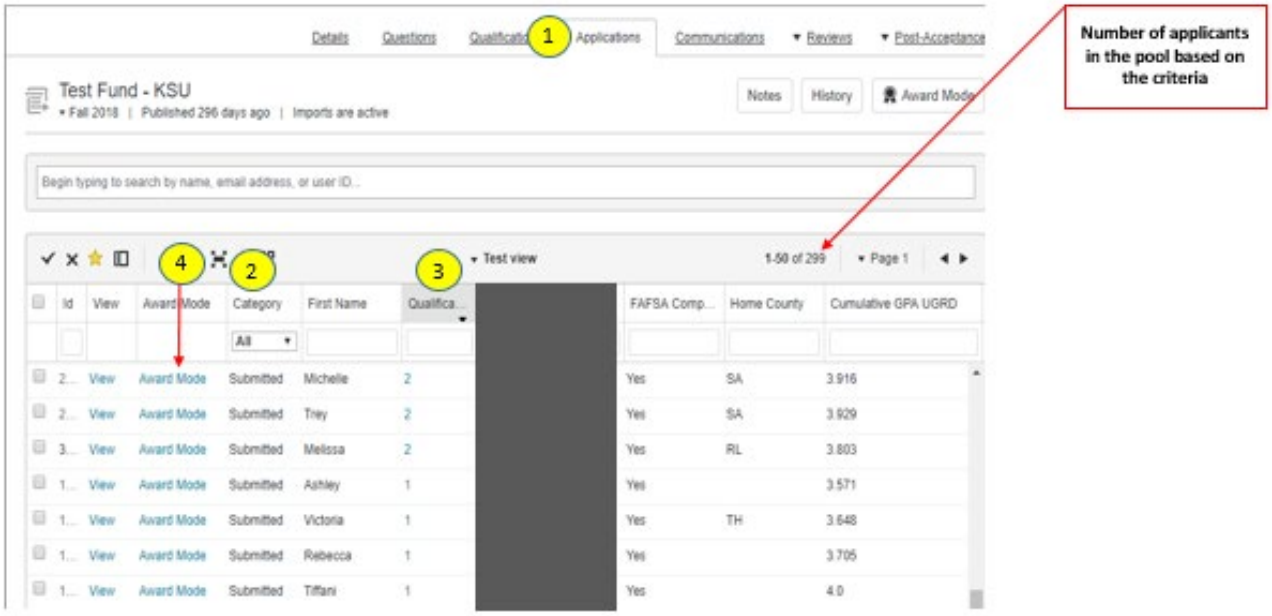
5-The “Reviews” tab shows the review group and reviewers the scholarship is assigned to.

6-The “Communications” tab is not currently in use in accordance to the University’s decision. It would typically show the automated offer and post-acceptance emails award recipients would receive.

7-The “Post-Acceptance” tab shows the post-acceptance grid which is used to collect thank you letters and much more.

Viewing the Applicant Grid

The applicant grid allows you to monitor how many qualified applications are being submitted for each scholarship.



1-Click on the applications tab to view applicants and their data points in a grid view.

2-The "Category" column will show all qualified applications in the "submitted" category. Once the selection and awarding process starts to take place, the categories will differ.

3-The "Qualification Points" column will indicate whether an applicant has met any of the qualifications groups. Some opportunities may have multiple qualification groups, therefore some applicants will have more than one qualification point if they meet multiple qualification groups for that opportunity.

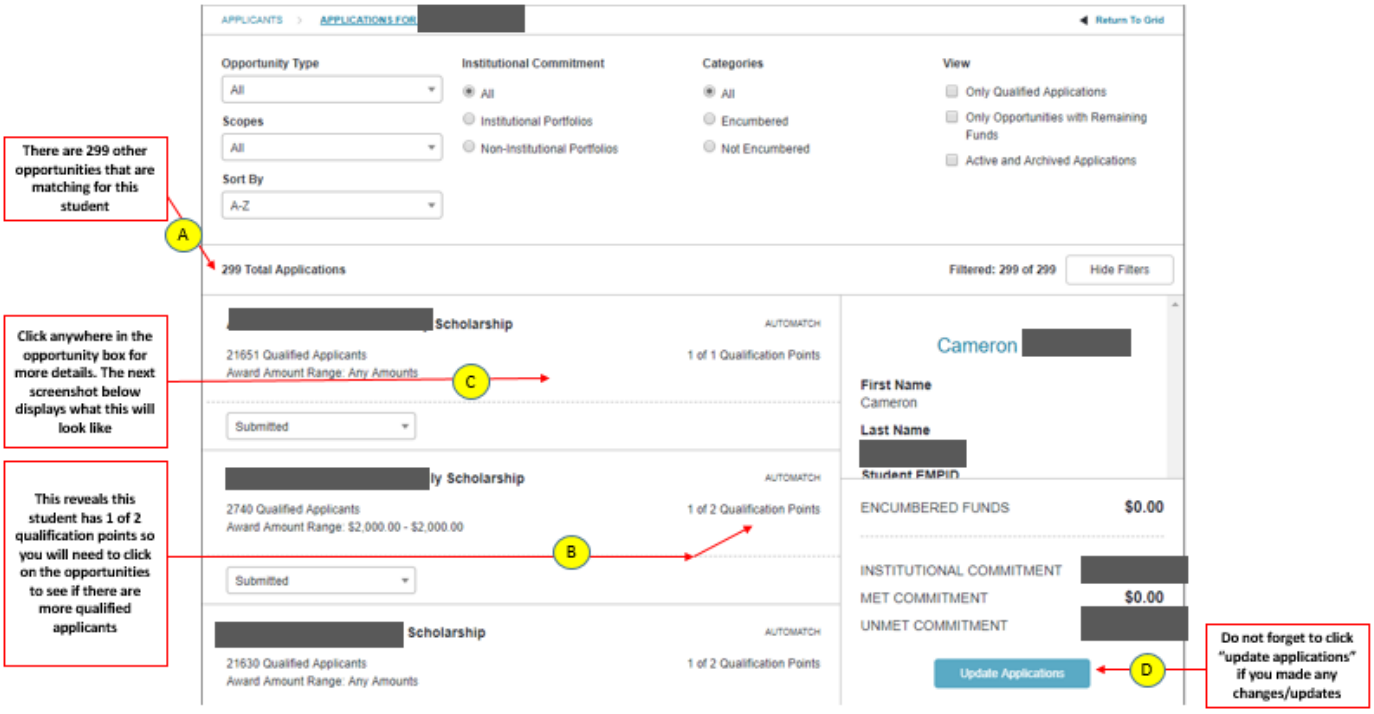
Example

The qualifications for this opportunity is as follow:
1 point -> if you are an undergraduate student in the College of Education and have financial need with your home state as Kansas.
1 point -> if you are an undergraduate student in the College of Education and have financial need with your home state as Kansas and your home county as either Crawford, Douglas, Lyon, Pottawatomie, Riley or Saline.
***If an applicant meets both criteria, then they will receive two (2) points and should be considered rather than someone who only meets one of the criteria.

Note: Do not solely rely on the qualification points. It's crucial that you read your MOU as well as review necessary data columns in the application grid as well as other factors defined by your college, department or committee to aid you select the best possible applicant.

4-The “Award Mode” allows an administrator to view all opportunities that an applicant has as application for, whether they qualify for the opportunity, any encumbered amounts the applicant has, etc. This feature allows administrators to award on an applicant basis rather than in each individual opportunity.

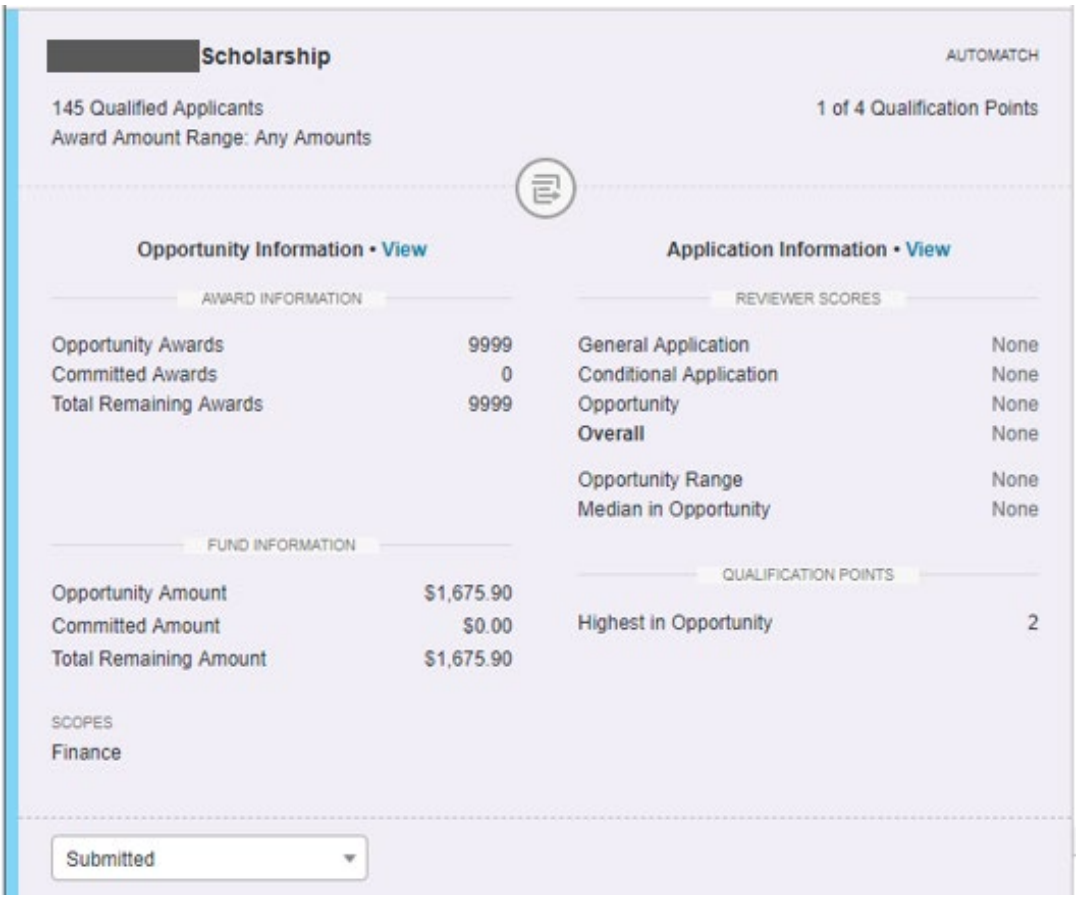
With all of the applicant data, the scholarship administrator can make informed decisions to award applicants from these applications, move them in to any category they choose or take no action at all.



A-This reveals 299 other opportunities that is being match with this applicant.

B-This reveals the student has 1 of 2 qualification points so you will need to click on the opportunity to see if there are more qualified applicants.

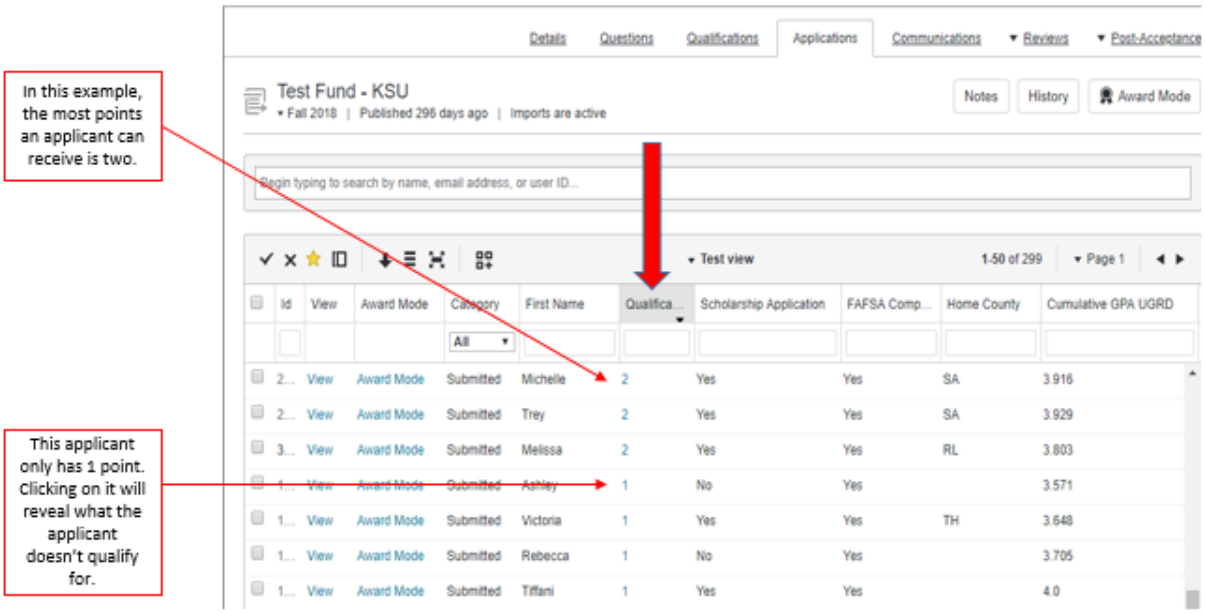
C-Click anywhere in the opportunity box for the view to expand or collapse.

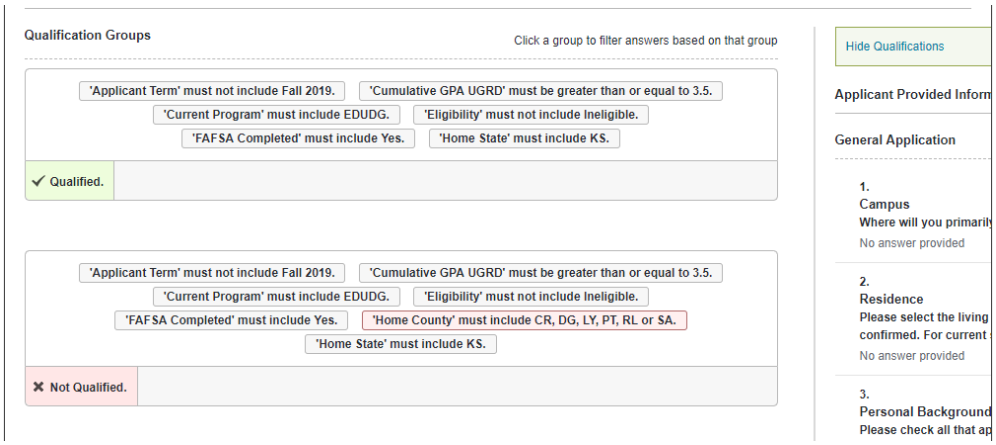


D-Do not forget to click “update qualifications” if you made any changes/updates.

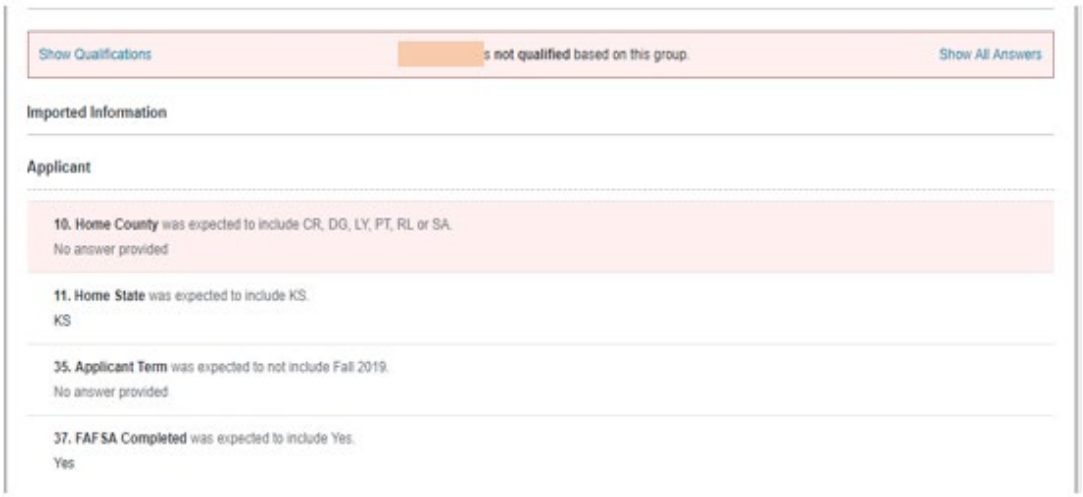
Verifying an applicant is unqualified

1-In the example below, the most points an applicant can receive is two (2). Clicking on the "qualification points" with the lesser points (1) reveals what the applicant doesn't qualify for in the second and third screen shot.





3-You can also click on the qualification they don't qualify for to obtain more details. In this case, the applicant doesn't qualify due to not meeting the Home Counties in the criteria.



Identifying Potentially Qualified Applicants

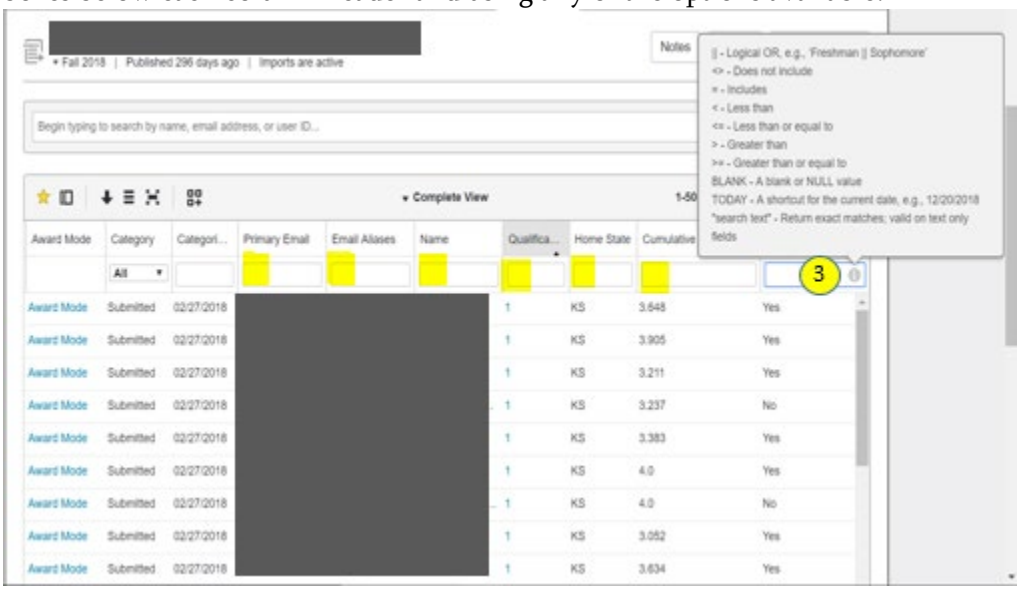
We will use the MOU criteria below to demonstrate how to potentially narrow the applicant pool.

ELIGIBILITY: The one recipient of this scholarship will be an undergraduate student properly enrolled in Elementary Education in the College of Education at Kansas State University. Preference will be given to a student from the state of Kansas who exhibits financial need and has a minimum 3.0 cumulative grade point average, based on a 4.0 scale. In all other respects, these funds will be awarded without restriction to race, gender, national origin, religion, age, sexual orientation or disability.

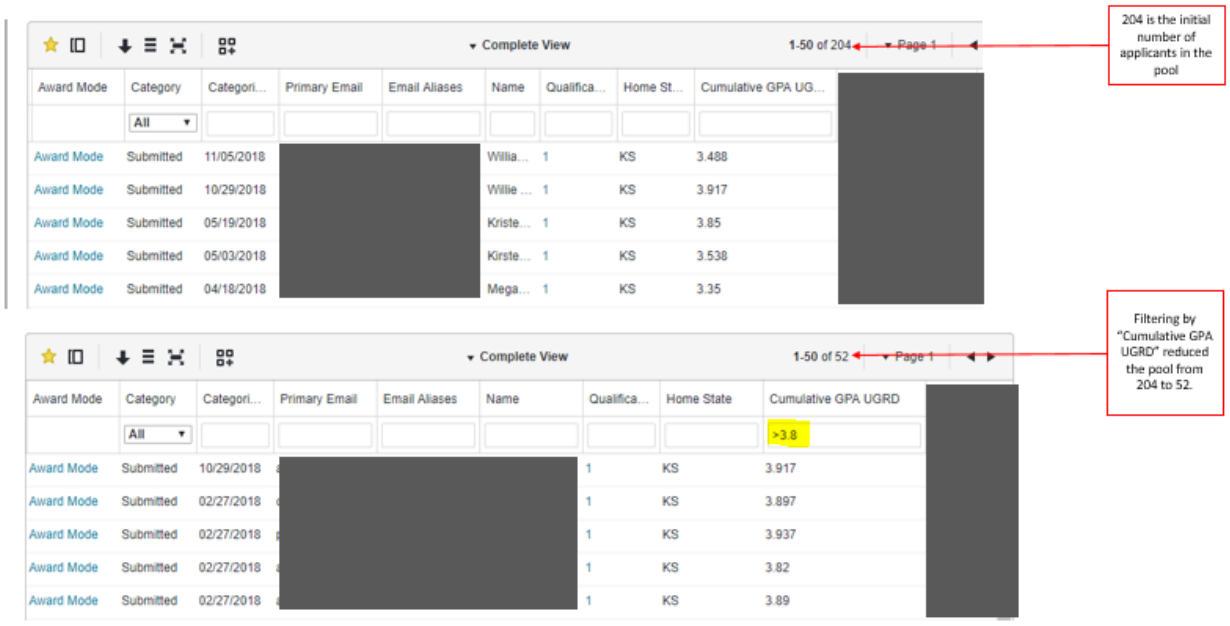
1-Based on the criteria, there are 204 applicants that meet the requirements. Similar to excel, you can move your columns in any directions (left, right). In the screenshot below, "Qualification Points, Home state and Cumulative GPA UGRD" were all moved so they can be closer to other columns.

2-Based on the number of applications, you may have multiple pages of applicants.

3-You can narrow your pool of applicants by **filtering or sorting** as well as clicking in most of the boxes below each column header and using any of the options available.



4-In the second screenshot below, the "Cumulative GPA UGRD" column was also filtered by ">3.8" bringing in applicants with a cumulative GPA UGRD of 3.8 and higher. Our pool was reduced from the 204 to 52.



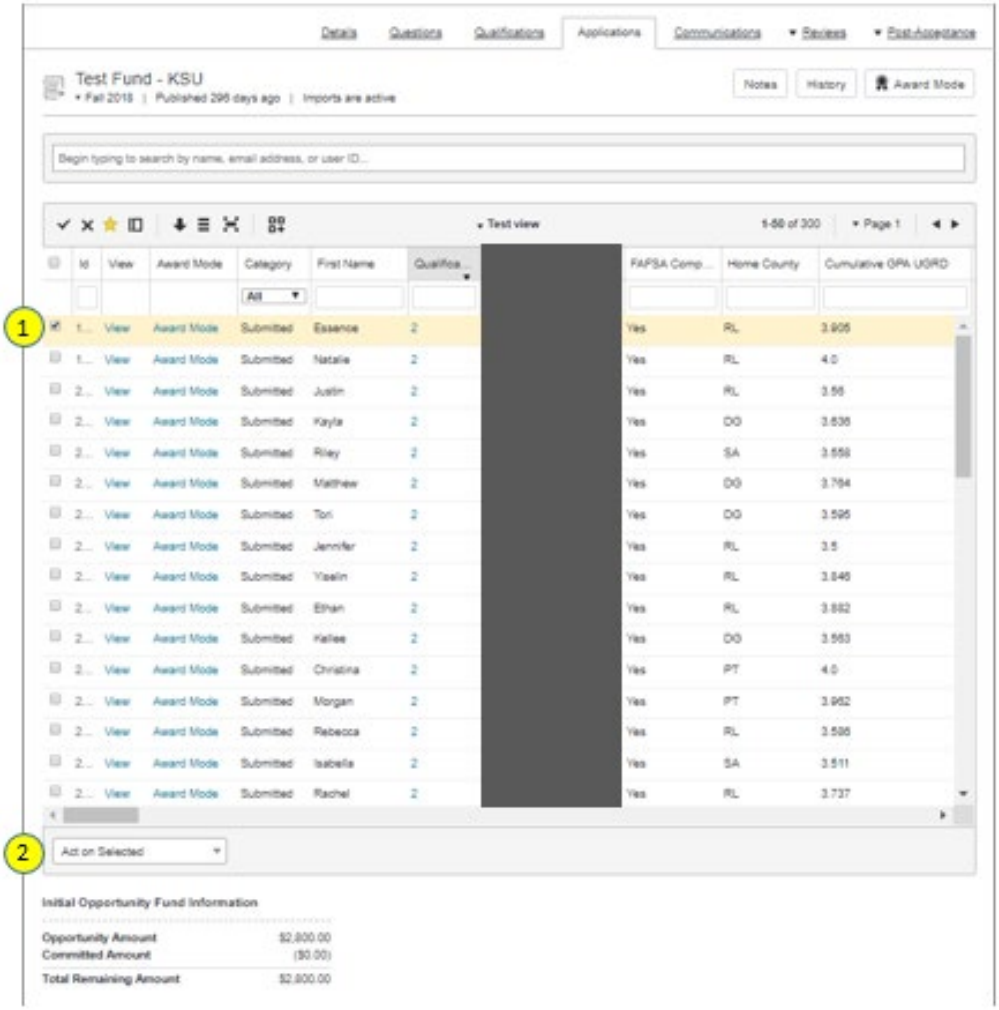
Note: You can re-arrange, filter, most columns in your grid to lower your pool of applicants. You can also click most column headers to sort A to Z or low to high. To reverse the sort order, simply double-click on the column header.

***Example**: From the set MOU criteria (based on donor intent), if your college requires applicants to have a GPA of 3.5 GPA and higher,* you can reduce the number of applicants you see by adding qualifiers to a specific column. In this case, you can add ">3.5" in the "Cumulative GPA UGRD" field and then press enter to only bring in applicants who meet an UGRD GPA of 3.5 and above. *This is up to you, your college/department or committee to decide how to further lower your pool of applicants.*

Making an award to an applicant

1-Locate the applicant you have decided should receive the award and click the checkmark box.

2-Click on “Act on Selected” and click “Categorize”

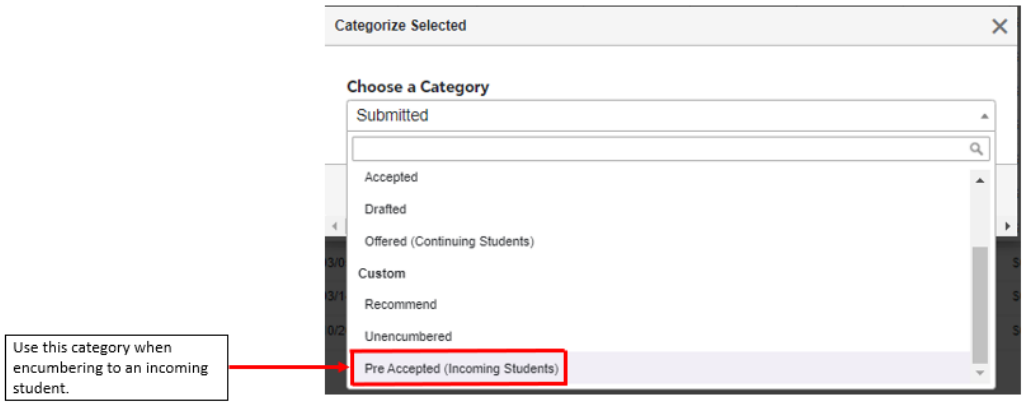


3-Each applicant will start in the “submitted or drafted” category. Please read the following instructions carefully prior to encumbering/selecting students.

IMPORTANT REMINDER: There are two separate categories when encumbering “Continuing students” and “Incoming students”.

Awarding to an Incoming Student:

When encumbering/selecting an award for an incoming student, please use the "**Pre-Accepted (Incoming Students)** " category.

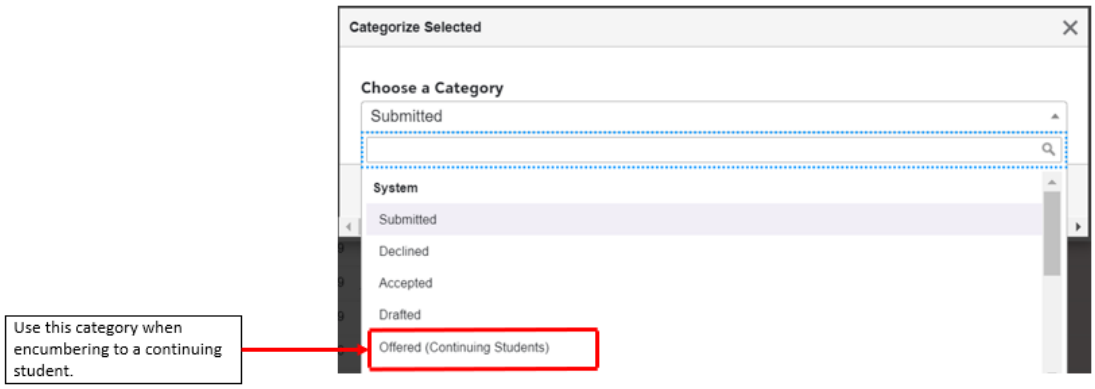


The Pre-Accepted category is used any time that a student is not being asked to accept an award within KSN. Students will be automatically moved on your behalf to an ACCEPTED status at a later time.

Once the applicant is moved to "Accepted", an associated communication to this category is triggered and the post-acceptance notification is presented on the applicant's dashboard in KSN.

Awarding to a Continuing Student:

When encumbering/selecting an award for a continuing student, please use the "**Offered (Continuing Students)** category.

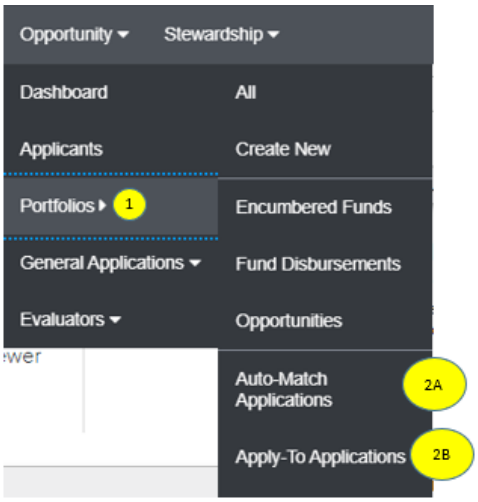


When an application is categorized in the "Offered (Continuing Students)", this means that an award is officially offered to an applicant.

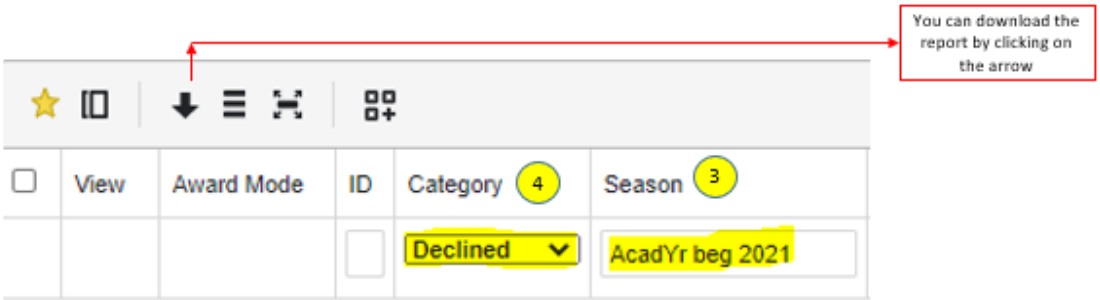
- **If the applicant accepts the offer,** then the applicant is systematically categorized in the opportunity application grid as "Accepted". Once an applicant is systematically moved into the "Accepted" category, an associated communication to this category is triggered for the post-acceptance.
- **If the applicant declines**, the administrators will need to run a report in the system to determine applicants who have declined an offer. This allows you to identify students who have declined an award and it provides you the opportunity to re-award the scholarship.

To view or download a list of applicants who have declined an offer, simply navigate to:

- Opportunity > Portfolios > click on the "Auto-Match Applications" or "Apply-To Applications" depending on the opportunity type that you have.

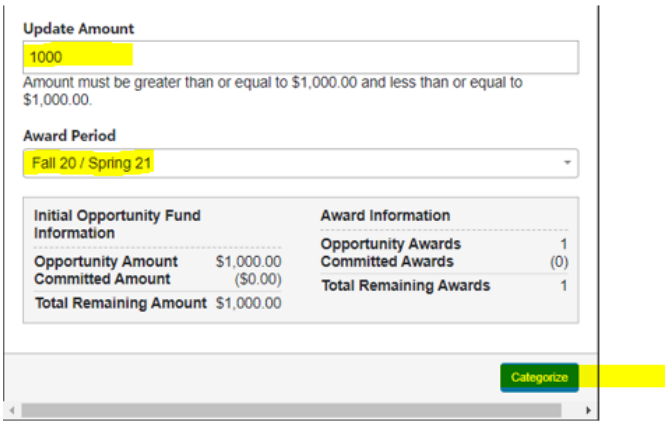


- Enter or sort by the appropriate season then select "Declined" from the Category column.



IMPORTANT REMINDER: Students who remain in the "Offered (Continuing Students)" category will be switched to the "Accepted" category at later time.

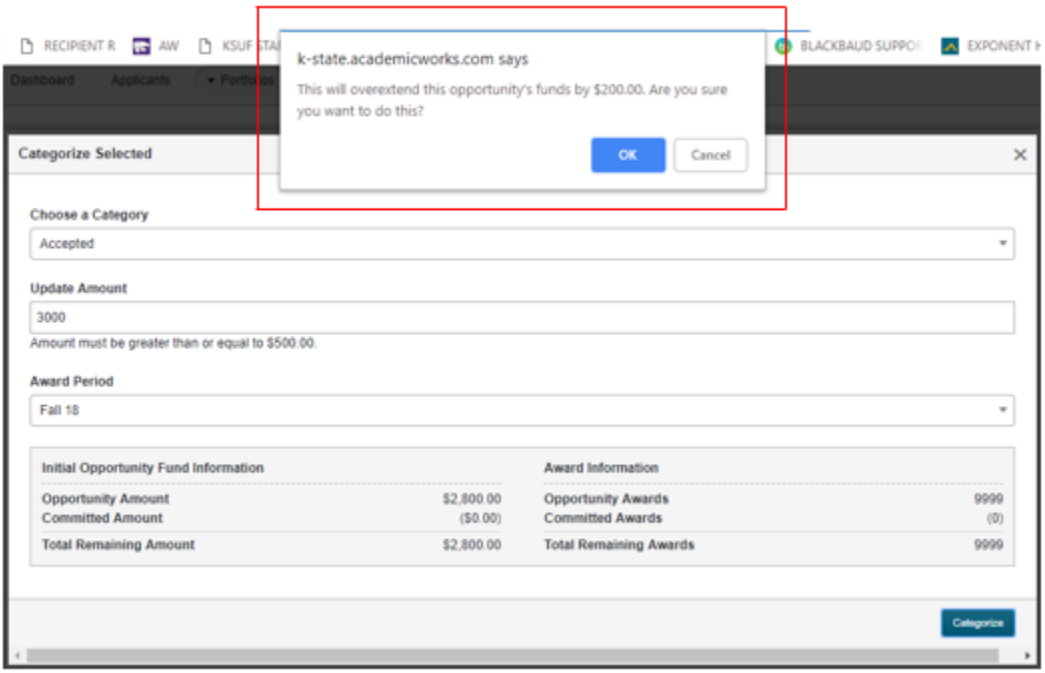
4-Once you have selected a category, you will be provided with the screenshot below to input the amount and to select the award period.



Note: Choosing $1000 or any other amount for "Fall 20/Spring 21" or any other two awarding period combination will split the amount where $500 will be awarded in Fall '20 and $500 in Spring '21.

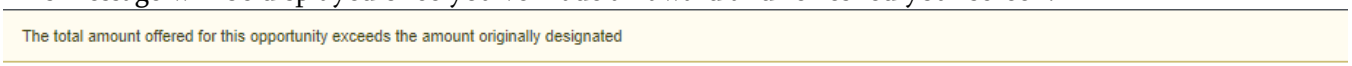
5-Awarding more than what is available in the amount will either prompt one of the two messages below. You may want to review the amount available and lower the awarding amount.

OPTION 1

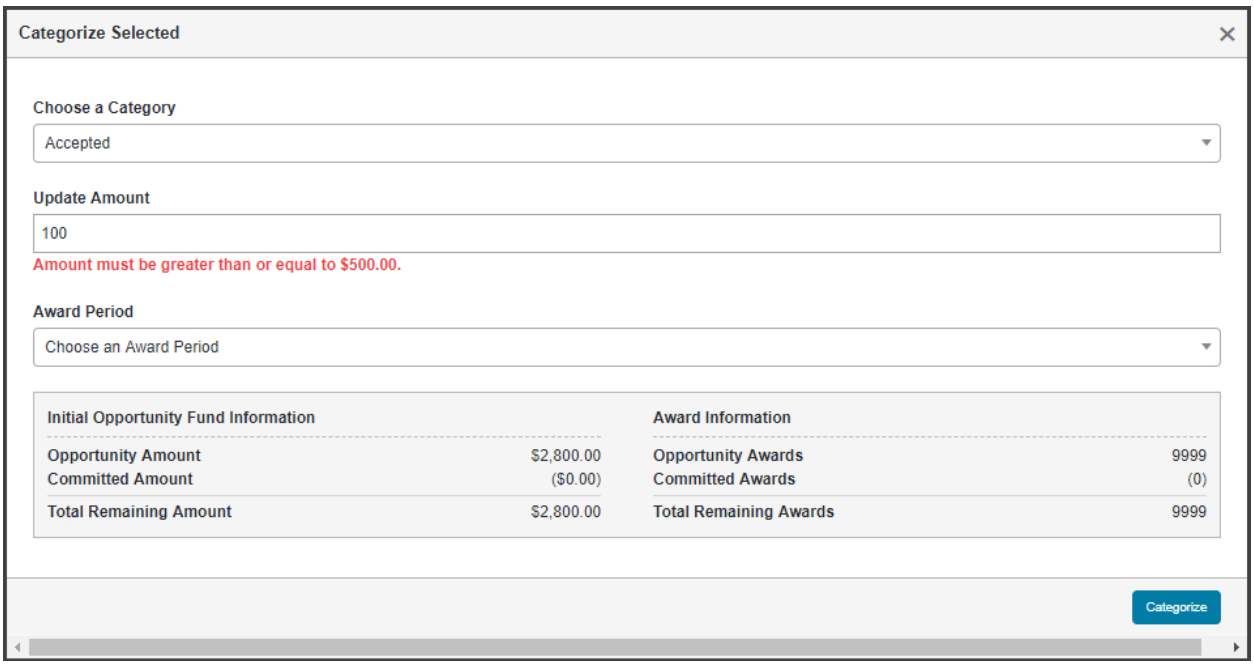


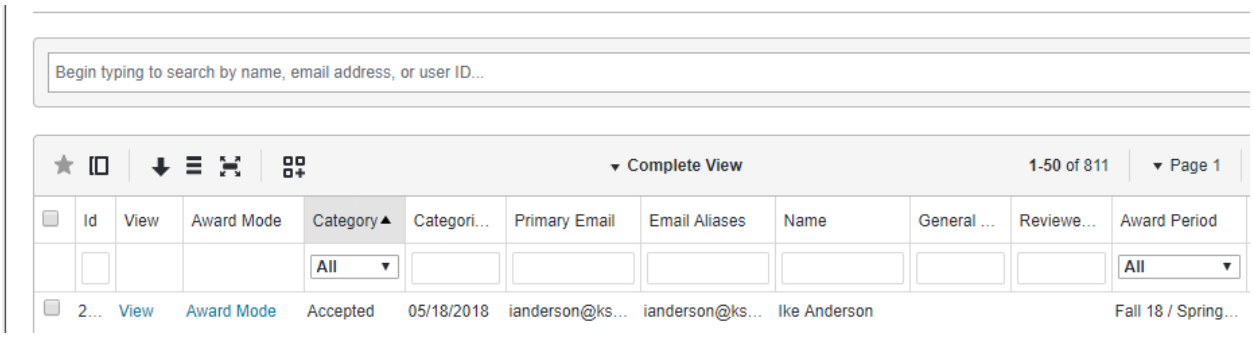
OPTION 2

This message will be displayed once you've made an award and refreshed your screen.



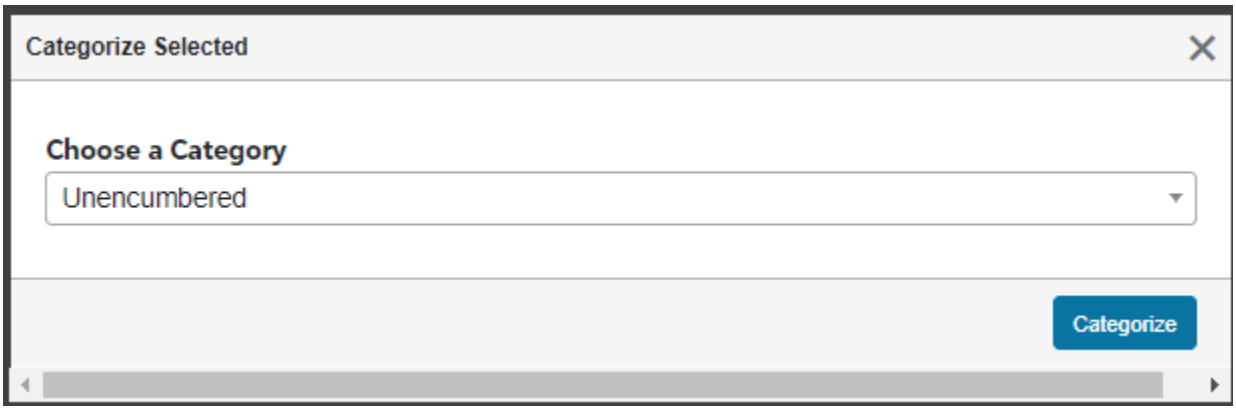
6-If the MOU specifies a minimum or maximum award amount, this will be captured in KSN already. In this instance, I'm given the message in red as there is a $500 minimum award amount as I was awarding an amount lower than the minimum specified. Once you are done with selecting the category, the amount and award period, click on **categorize.**





Reversing an Award

In case where you made an error or awarded to the incorrect student, follow steps 1 to 3 above and categorize your applicant back to the "**Unencumbered**" category and click "**Categorize**".

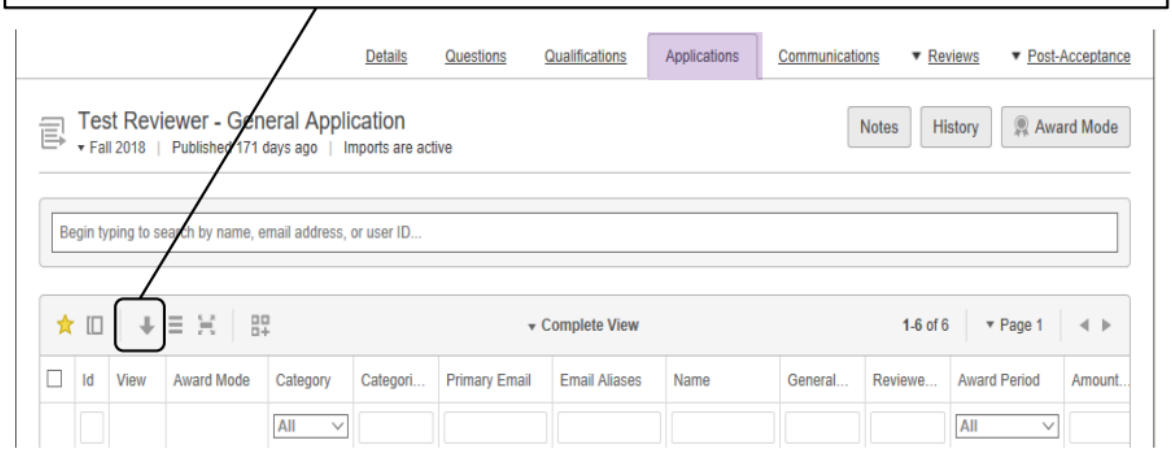


Downloading the Applicant Grid Report

Download reports from the applications grid by clicking on the "download report arrow."

Reports can be downloaded from any grid as long as it has the download report arrow.

The following instructions are the same for downloading all reports.

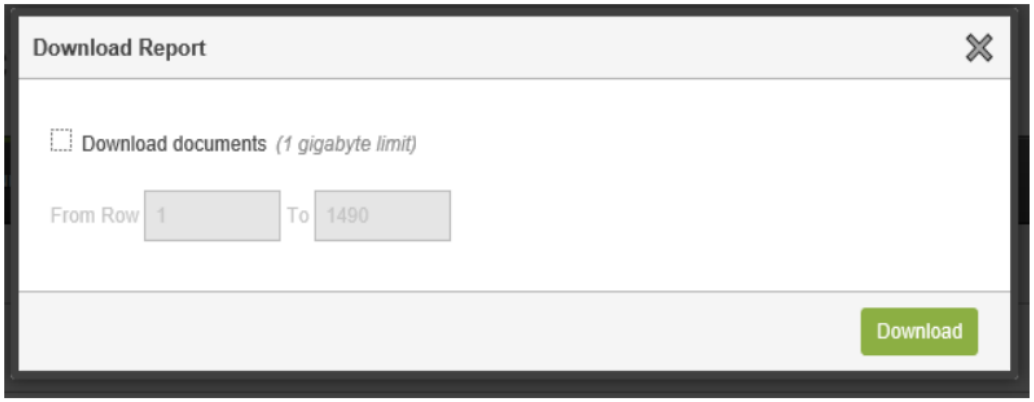


A pop up screen appears once the "download report arrow is selected.

You have 2 options on the Download Report popup.

1. You can select the box ☐ Download documents and choose a range of rows to download and then select the green Download button.

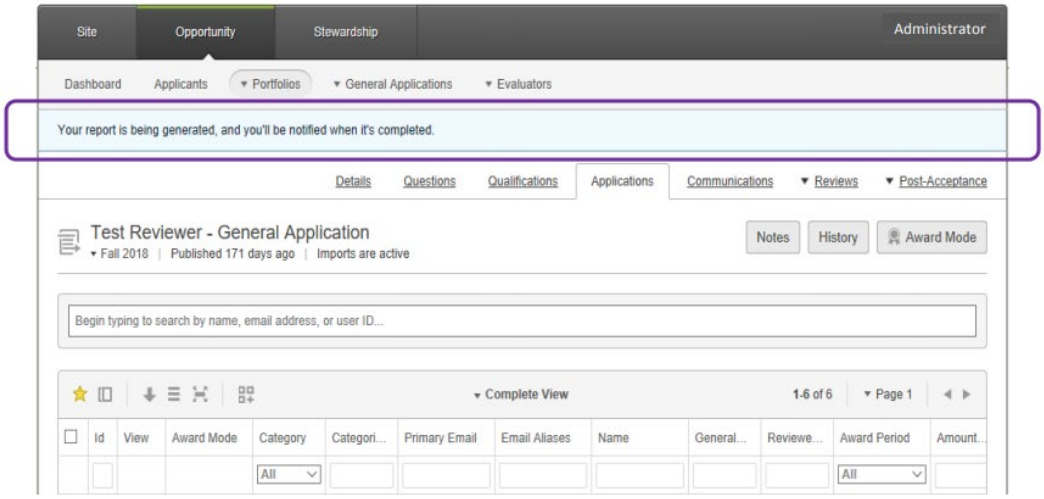
2. Most likely you'll want to download all of the applicants in your pool in which case you can just click the green Download button.



Note: *please keep in mind your downloaded file under the "**Complete View**" will contain every column. Once you have created and saved your customized view, you will be able to download only data contained/which you have added to your customized grid.*

*Clicking the "**Download Report**" box should primarily be selected if you are download a grid that contains documents.*

Once you've selected to download your report, you'll see a banner appear on the page stating "your report is being generated, and you'll be notified when it's completed".



The notification will be delivered to your inbox and you can select the link and save as an excel file on your KSU approved laptop or computer temporarily.

Fri 7/20/2018 3:44 PM

Kansas State University Scholarships <ksn@ksufoundation.org>

Your opportunities report is ready for download!

To KSUadmin@ksu.edu

Hi **KSUadmin@ksu.edu**

The opportunities report you requested is now available for download at the following link:

http://k-state.academicworks.com/reports?email_id=KSUadmin%40ksu.edu&key=reports%2Fopportunities%2Fall%2FFund%2520and%2520scope-1532119441.zip

Thanks!

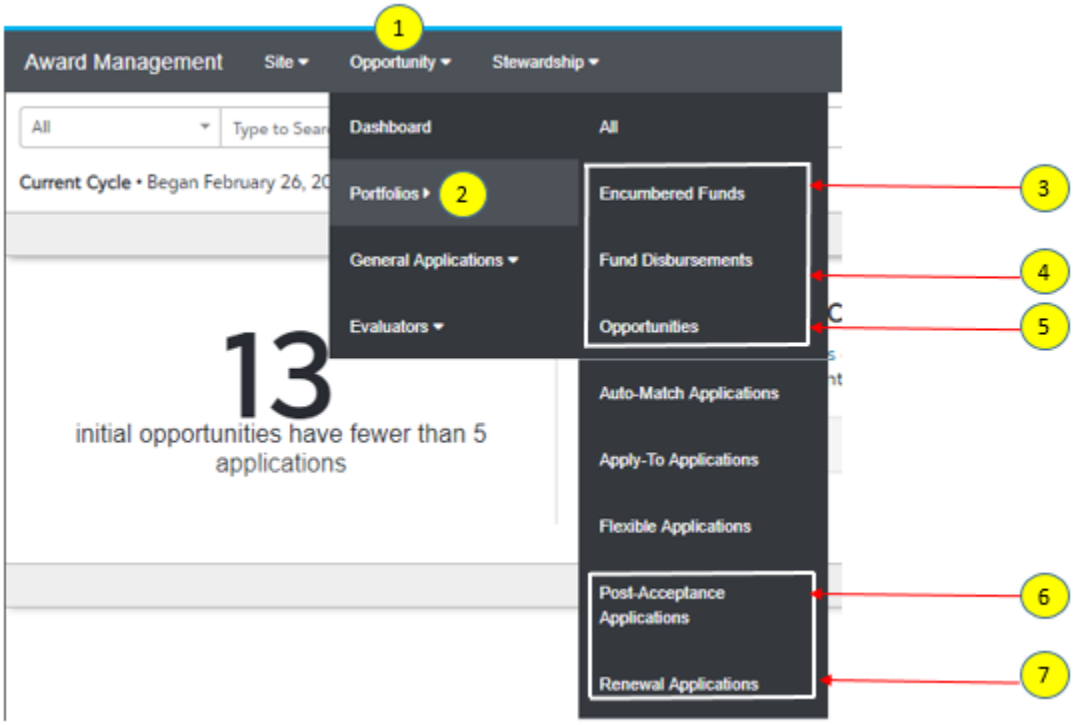
We are bound by FERPA and the Higher Education Act (HEA) to protect the sensitive data of our students.

Best practices are as follows:

- Never download reports on a laptop or computer that was not issued by Kansas State University.
- Minimize the amount of time you store the reports on your laptop or desktop. If you need the reports for a longer period of time, please save them on your OneDrive or your personal network drive.
- Never use thumb drives, flash drives, CD's, or other transportable media to store **ANY** student data.
- Minimize sharing of these reports, individuals accessing the data on these reports **MUST** have been through FERPA training and have a legitimate business need to see the data.

Note: the content in the email may vary.

Downloading other types of reports



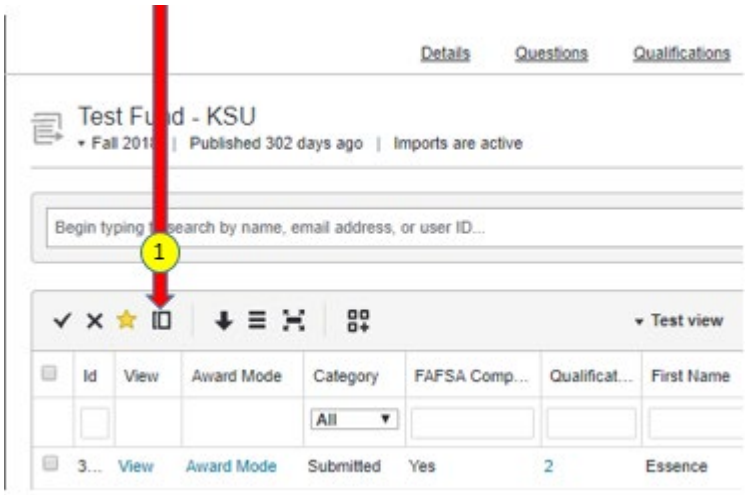
1-Clicking on the "opportunity" tab will reveal various options.
2-Click "Portfolios" to be presented with additional options including reports
3-The "Encumbered Funds" reports will shows all awards for your scholarships. This provides the names of students that you have selected to receive an award. The report also includes the fund name, number, award period, amount awarded, student name and EMPID and the remaining award amount.
Note: You can use the "Award Period, Categorized At, Category along with plenty other columns to filter your grid".
4-The "Funds disbursement" reports shows all applications selected for an award as they move through the disbursable categories, which are tied to post-acceptance and renewals.
5-The "Opportunities" reports shows the program/department funds that are built in KSN within your assigned scope. Excellence funds are not typically built in the system but can be by request if they are used to award students per the use of the funds section of the MOU.
6-The "Post-Acceptance" report will provide a grid view of post-acceptance applications which are all applications in the post-acceptance process within the user's scope.
7-Clicking on "Renewal Applications" will provide a grid view of renewal applications.

Note: *You will also have access to download the Auto-match and Apply-to Applications (if applicable).*

Creating your own customized grid

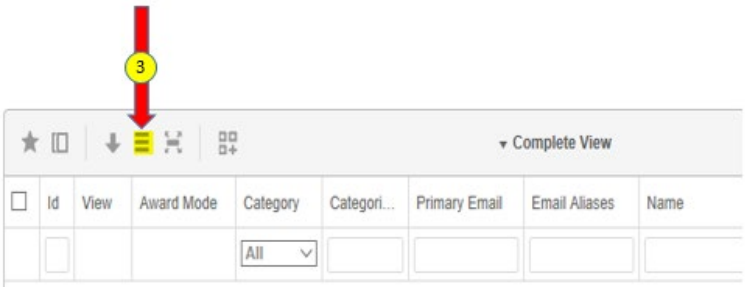
By default, the applicant grid will show a “Complete View” with all available column displayed.

1-Click on the icon shown below.

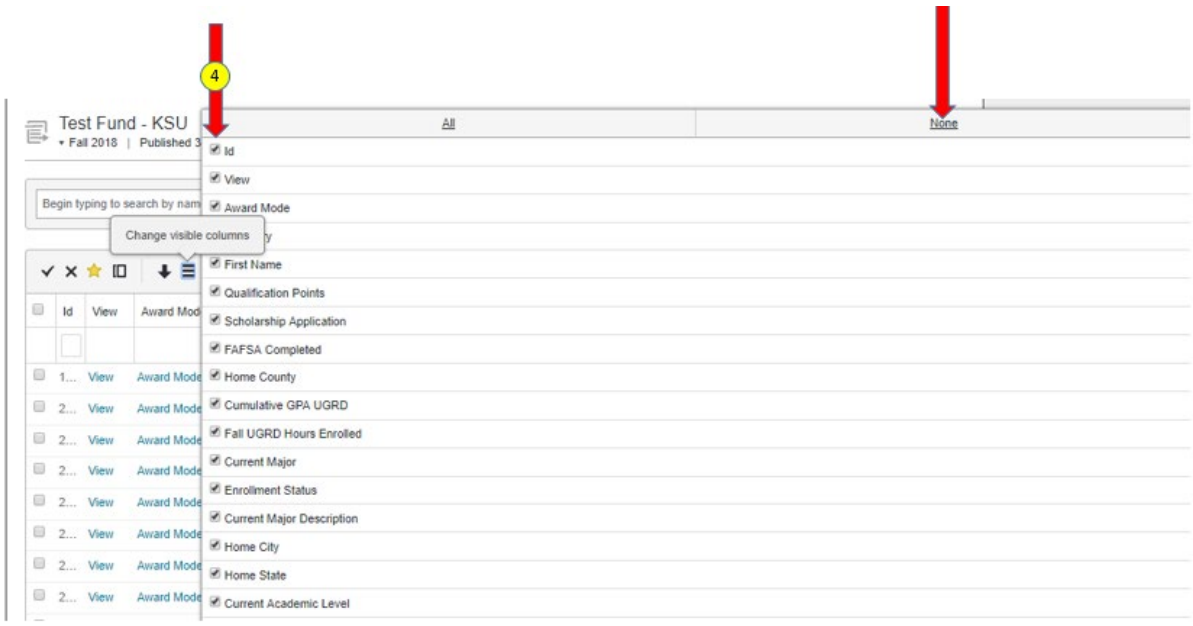


2-Name your view what you like it to be.

3-Click on the icon that has the three lines and you’ll get all the columns/data coming into KSN from KSIS. Check none and only select the columns that you would like to see.

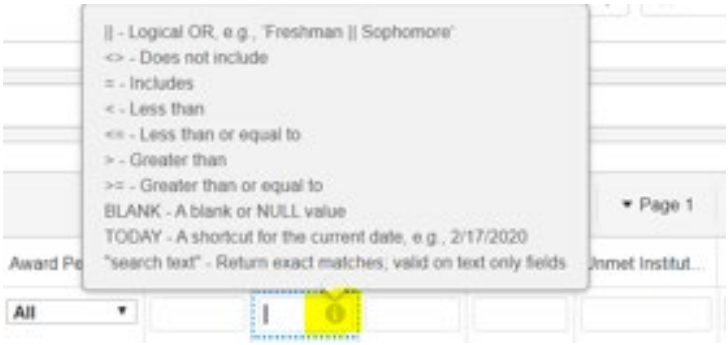


4-Uncheck any unwanted columns you do not wish to see from the pop up screen. Click “None” to uncheck all columns.

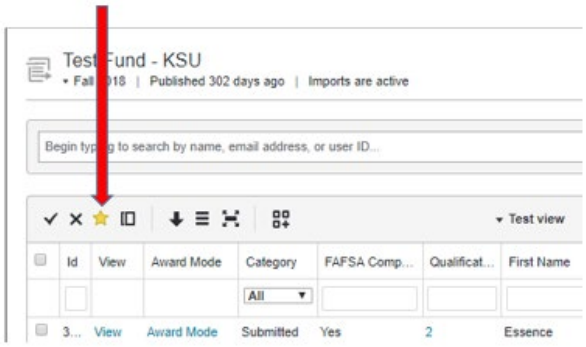


Optional: once you have created your own customized grids of data points that you are solely wanting to view; you will also have the option to filter majority of the columns to your liking as you would in any grid view.

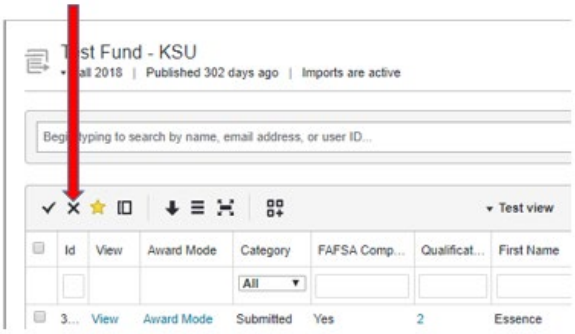
Example: If students are to upload an essay, you can simply locate the essay column and filter by <>BLANK. This filter will only reveal students who completed the essay.



6-Click on the star to make your customized view your default.

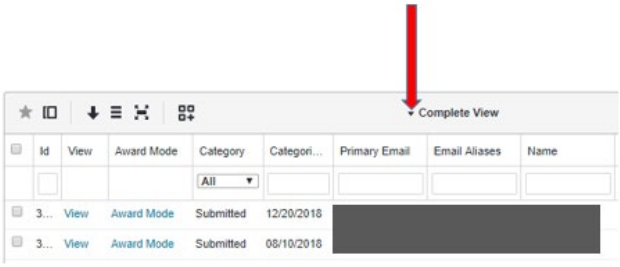


7-To delete your own customize grid at any point, click on the "X".



8-Once you have created your own grid. You can click the drop down menu to go back to the "Complete View" at any time.

9-If you would like your customized grid to be seen across all your opportunities, simple make the K-State Foundation Compliance staff aware of a fund that contains all the customized columns that you have created and we will have Academic Works/Blackbaud Award Management clone them for you rather than creating your own customized grid for each opportunity.



Note: All customized grids should include the "Qualification Points" column and should be filtered such that the most points sort to the top.

IMPORTANT REMINDER

The ability to share student data with non-university employees is a decision to be made by the University not the Foundation. While KSN provides the ability to invite outside reviewers, the University still needs to investigate a process to ensure external reviewers have gone through the proper steps to ensure compliance with FERPA and other regulatory issues.

The decision has been made by the University to limit the reviewer process and email invitation solely to K-State internal faculty and staff members at this time. This will continue to be an issue to be addressed in the future.

IMPORTANT REMINDER

Reviewer Invitation Email

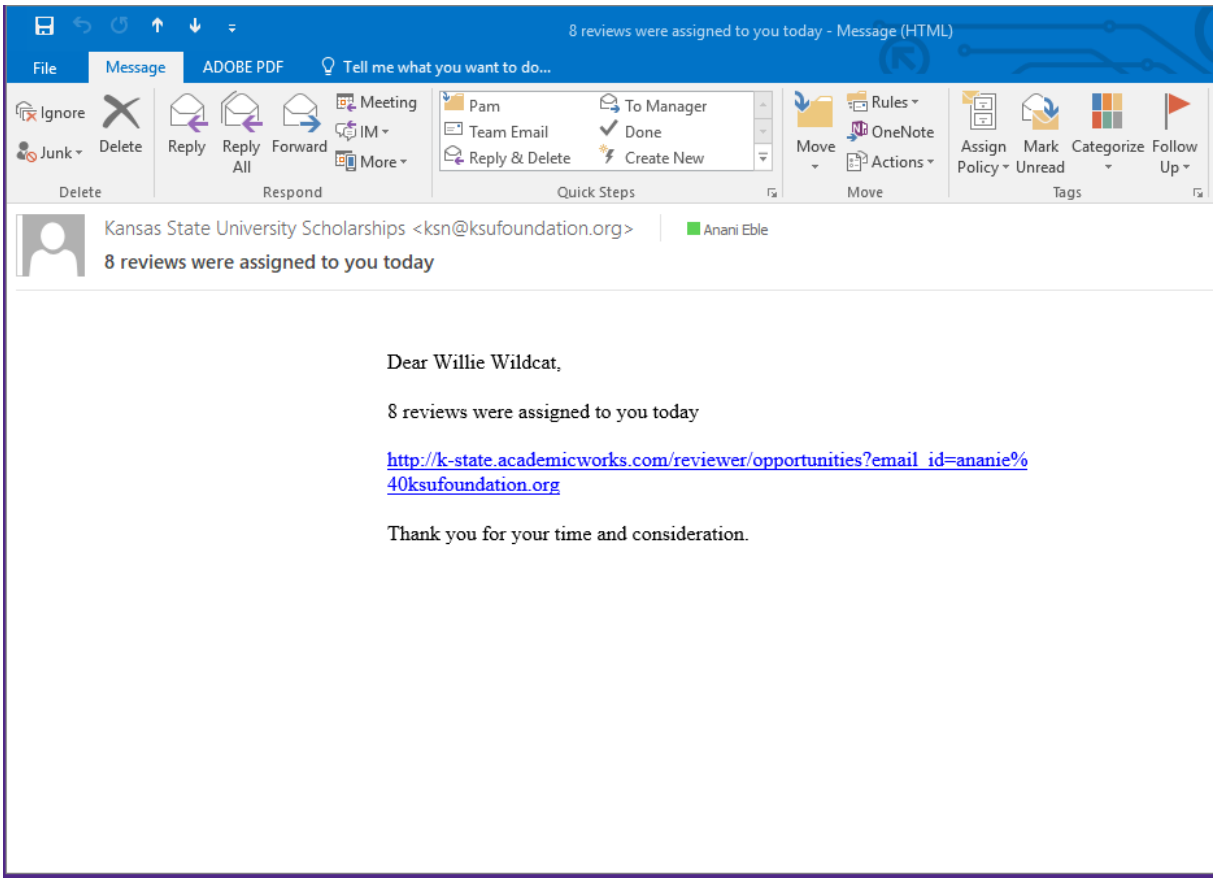
Note: Reviewer chairs can also be designated to review applications (this is up to the department/college).

As a scholarship review committee member, you will receive an invitation email alerting that you have opportunities and applications to review when the review period is open.

Once the new Reviewer user has been assigned at least one application for review and the Review Date for the associated opportunity (or the General Application) has arrived, they will be sent the Reviewer Assignment Notification email alerting them of reviewing assignments. If this user has never been in the system before, the email will also contain a confirmation link to assist them in establishing their account. **No emails will be sent to reviewers unless:**

- the Reviewer has been assigned applications to review (work to do)
- the applications are on or past the Begin Review Period date, but the End Review Period date has not yet arrived
- To reduce the number of emails sent to these users, the system consolidates all changes to the Reviewer's assignments into one daily "digest" Reviewer email, sent each evening at 3 AM (CST). This is the only time at which Reviewer emails will be sent out by the system.

Sample reviewer invitation email



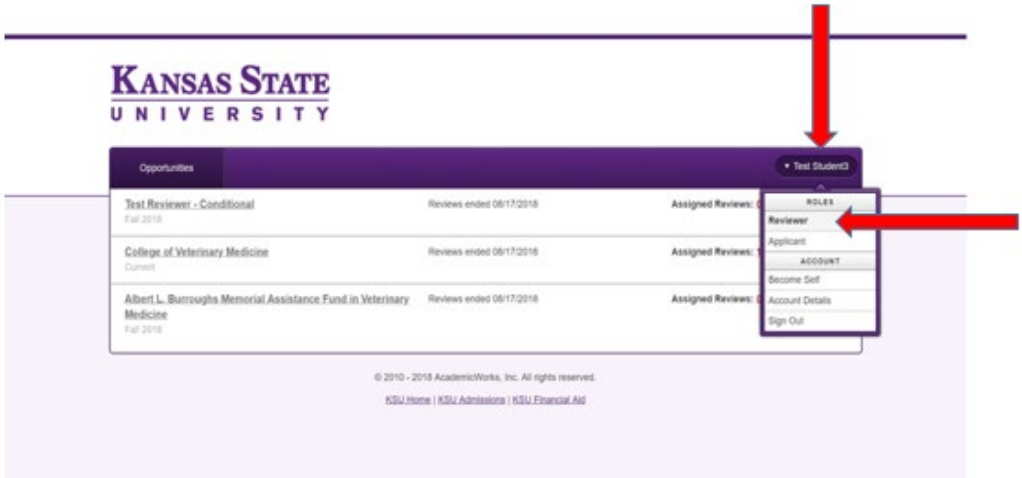
Dear Willie Wildcat,

8 reviews were assigned to you today

http://k-state.academicworks.com/reviewer/opportunities?email_id=ananie%40ksufoundation.org

Thank you for your time and consideration.

If you are also serving as a reviewer, you will need to switch your view from “Administrators” to “Reviewer” to complete reviews once you are logged in. This can be done by hovering over your name at the top left corner and clicking on the “Reviewer” role.



The reviewer homepage will display each scholarship you are assigned to review, along with the review period and the number of reviews assigned to you. Once the review period has ended, you will still be able to view your reviewers but you will not be able to complete any unfinished reviews.

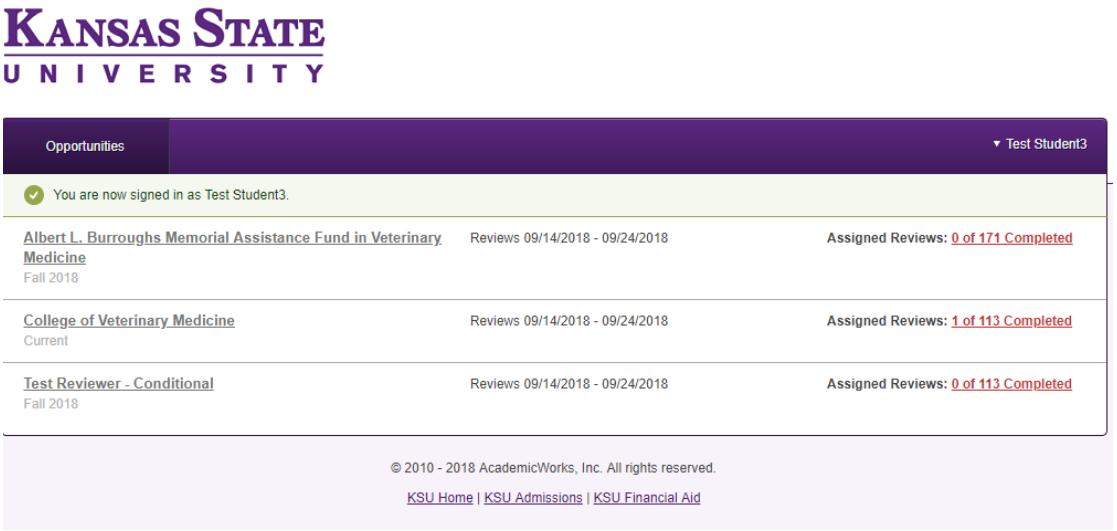
To complete your reviews, follow the steps below. Make sure to pay attention to any instructions in your review group, in addition to instructions your review committee chair may give on evaluating need, academic achievement, etc. These categories may be evaluated in different ways by different review committees.

Reviewing Best Practices

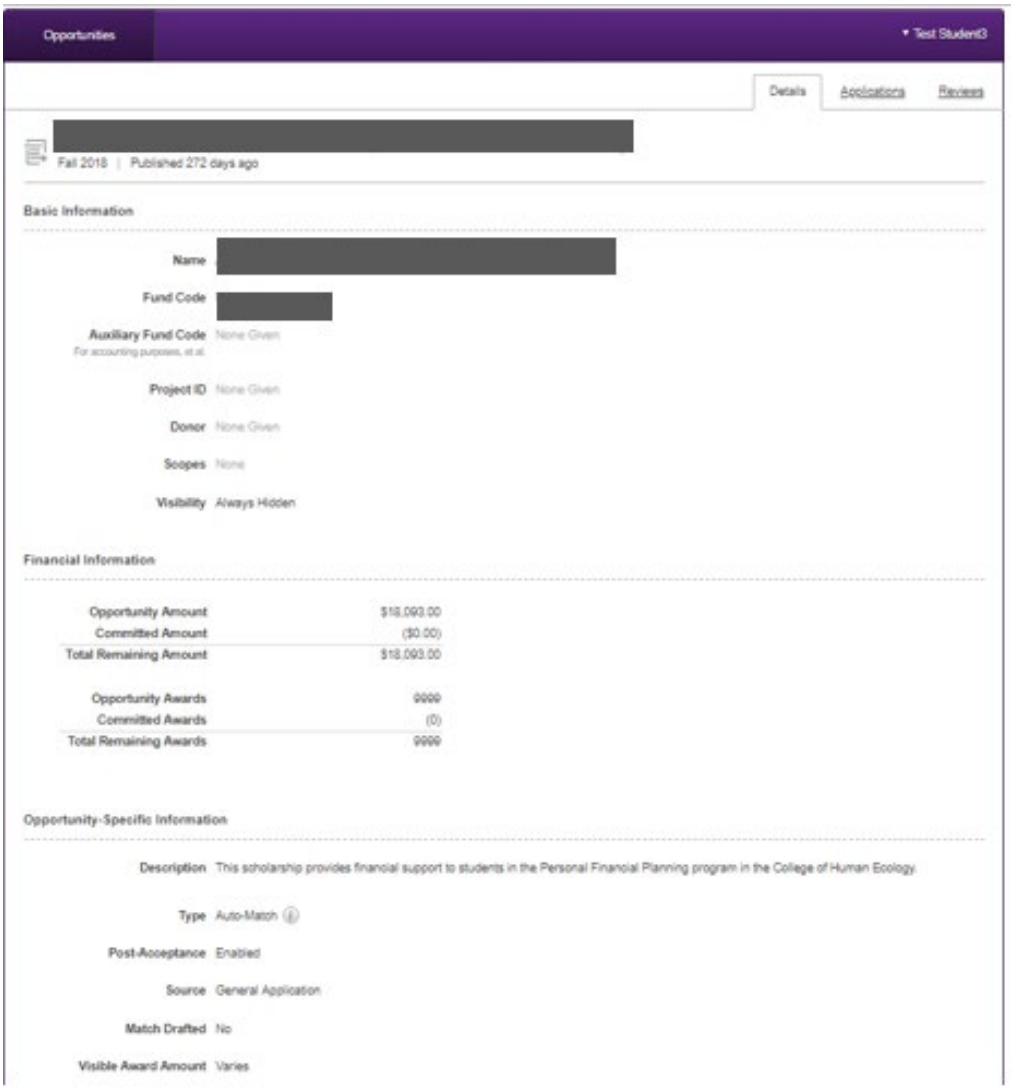
- Please only review the information applicable to the scholarship you are reviewing.
- Many scholarships don’t define how to judge academic achievement, work ethic, etc. Your administrator or review committee should determine how to evaluate them.

Please note: while other reviewers will not be able to see your reviews or ratings, the chair of your review committee and the opportunity administrator will be able to see your ratings and read your comments.

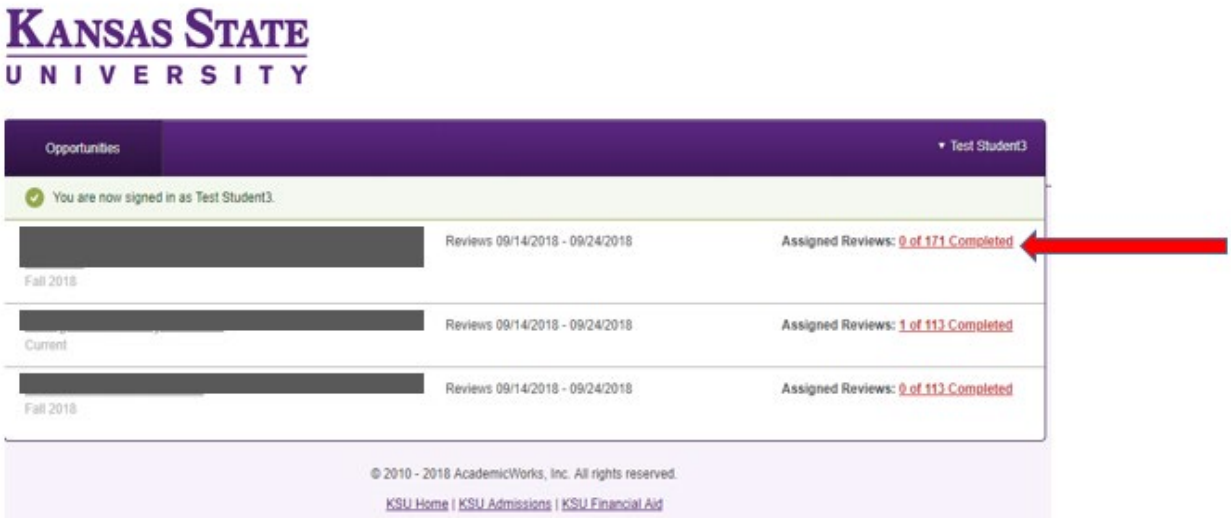
1-Once you log in, you will land on the Reviewer portal where you will see a list of opportunities or applications that you have been asked to review.



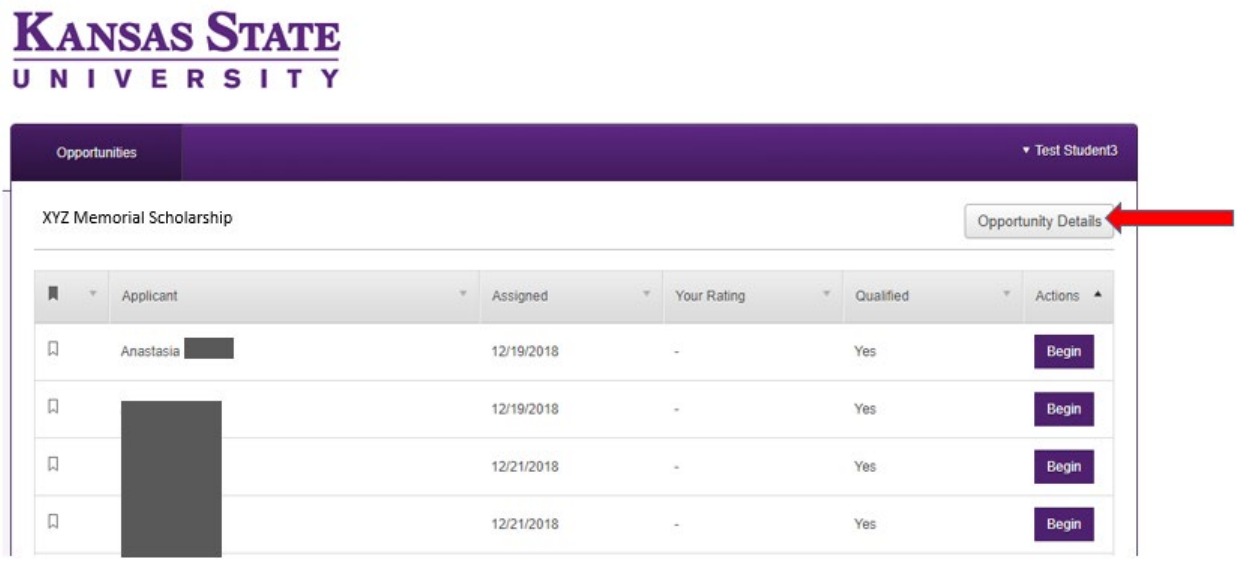
2-Clicking on the opportunity name allows you to view the opportunity details. You will see the basic financial, additional information, dates, etc.

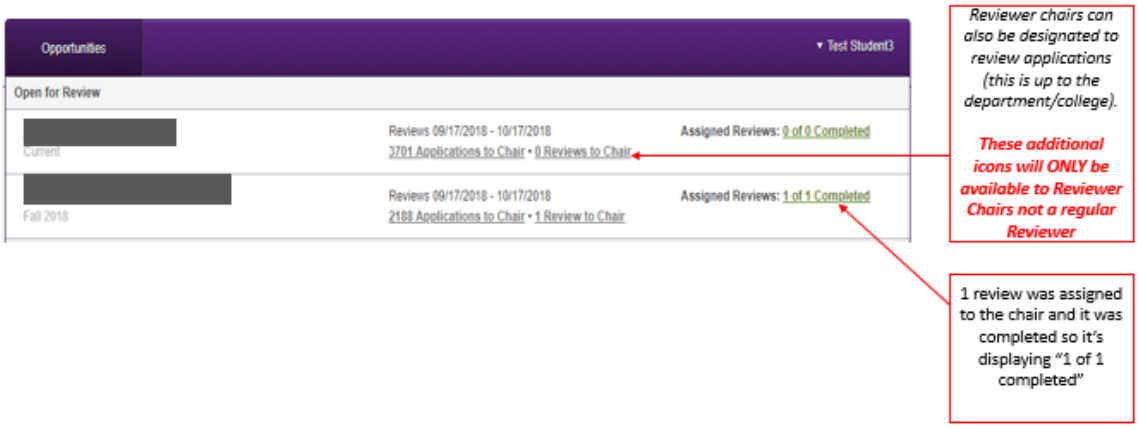


3-To begin reviewing, select the scholarship you would like to review by clicking on the number of assigned reviews.



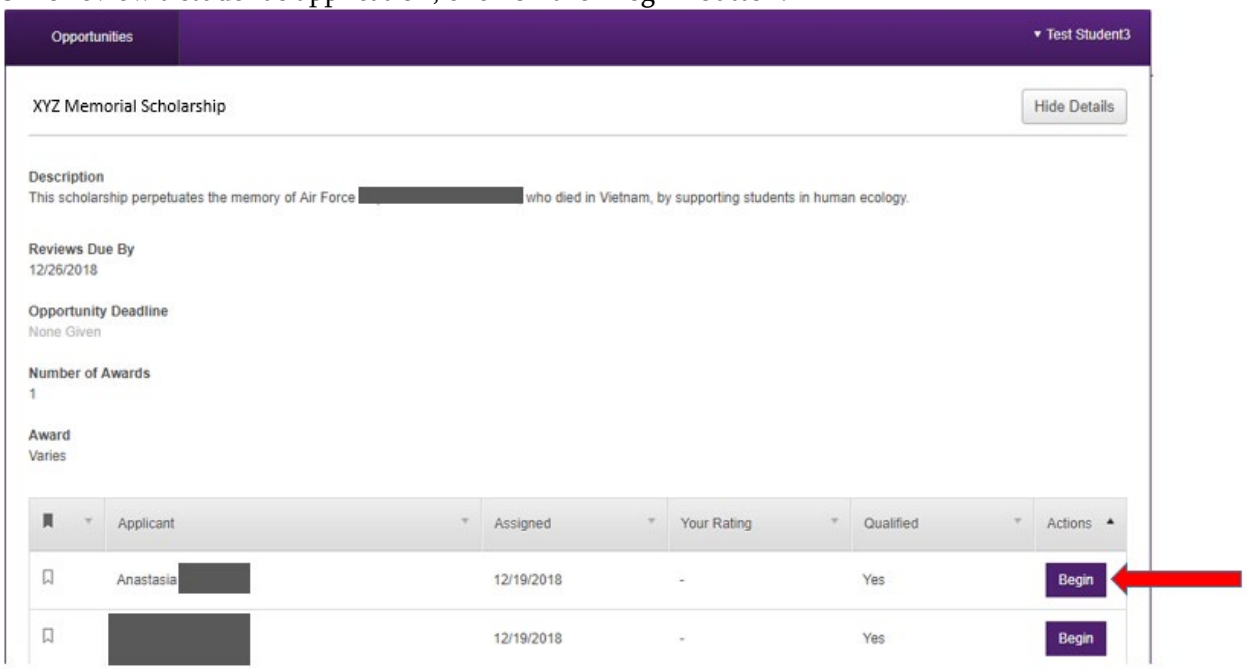
4-Before you begin reviewing applications, it's important to click on the "Opportunity Details" button. This will reveal any review deadline, awarding amount or any scholarship description if applicable.





When reviewing a student's application, you will be provided with the student's answers to questions on their general application, conditional application (if one was required for their college or department), and apply-to application (if additional questions were required such as essays or uploading an art work) and imported data from their student record. Please disregard any information that is not required for the scholarship you are reviewing.

5-To review a student's application, click on the "Begin" button.



6-While reviewing an individual application, reviewers can use the review and application tabs to toggle back and forth between reviewing and evaluating.

Select the view you would like to use to review applications. The "Review" tab reveals review instructions set by administrators such as rubrics and questions you will need to complete if applicable.

The application tab reveals answers on the applicant's General Application, as well as any imported, opportunity specific, or conditional application information (if present). Click on the "Side-by-Side" tab will display a full screen view of both the Reviewer and Application tab information. When ready to return to the normal view, clicking on the "Exit Side-by-Side" button will return the reviewer back to the basic reviewer portal view.

Note: There is a bookmark checkbox which allows you to place a reminder to any application or candidate you would like to re-visit at a later time.

OPPORTUNITIES › COLLEGE OF VETERINARY MEDICINE › TEST STUDENT3

113 Reviews

Review | Application | Side-by-Side

Instructions:

Thank you for your assistance in evaluating all of our candidates this year. Please remember to answer all required questions on your form and to submit all reviews before your deadline. For scores, a 1 is low and a 10 is high. If you have any questions, please contact [redacted]at [redacted]

Test Student3

Bookmark

☑ Mark this applicant in your list of evaluations so you can easily find them again.

★ Give an overall rating of this application

8.0

★ Financial Need

8.0

★ Academic Performance

10.0

★ Supplemental Materials

7.0

★ Overall Impression of Applicant

8.0

Rate this applicant

Financial Need Essay

8.0

Community Service

10.0

Is the applicant's financial need temporarily?

- (●) YES
- ( ) NO

Has this applicant met all requirements for this scholarhip?

- (●) YES
- ( ) NO

Is this applicant a finalist?

- (●) YES
- ( ) NO

Reviewer Comments (optional)

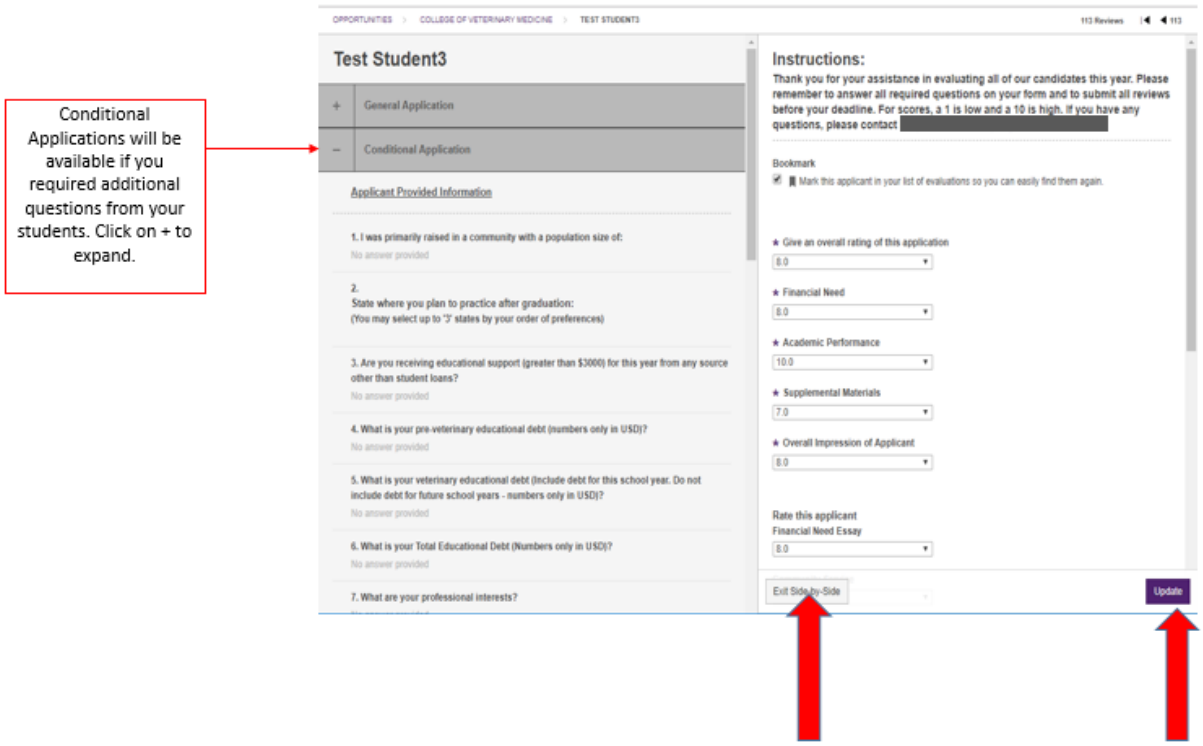
B I Help Preview Edit

This recipient would be a great finalist for this scholarship.

Example Formatting: *bold*, _italics_ Full Screen

Update

7-When you are in the “Application” or the “Side-by-Side” view, you can minimize the student’s General Application or Conditional Application easily access the information provided for that scholarship.

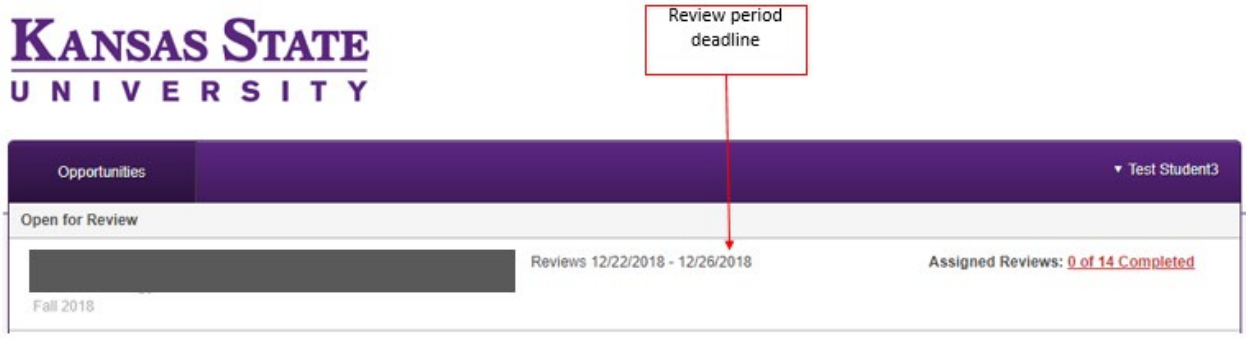


9-Complete any questions if applicable. Some review groups may not have required questions. The reviewer comment notes may be useful to you to capture your input regarding the finalists, especially if your committee will be meeting at a later time to discuss the finalists.

10-If you would like to finish your review at a later time, click the “Save” button. When you have completed your review, click the yellow “Submit” button. You will then be taken to the next review that needs to be completed. After submitting your review, reviewers may continue to update their reviews throughout the review period.

A reminder email notification will be send to reviewers stating there are remaining evaluations and the review period is approaching soon.

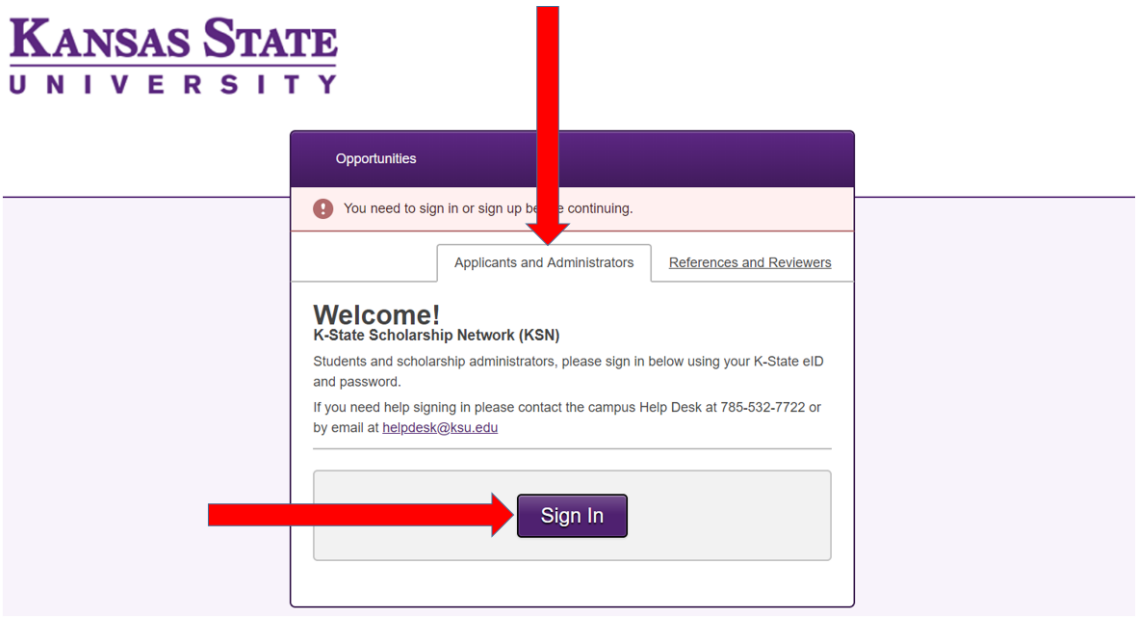
11-Please remember to submit all reviews before your deadline.



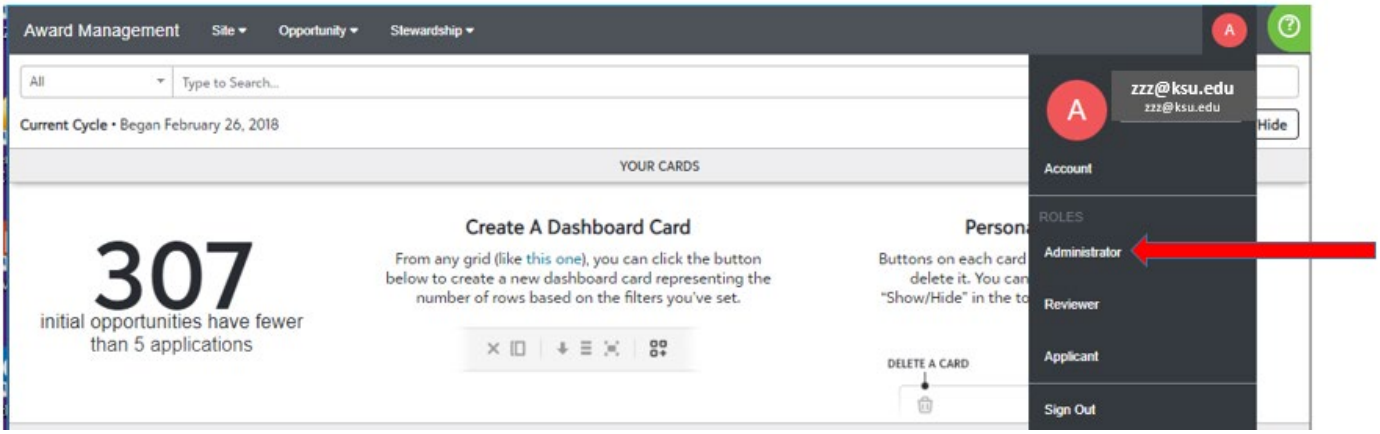
Note: It may be best to select an alternate or two scholarship recipients in case, the first (1st) recipient becomes ineligible before the awards are paid out without requiring the committee to select an alternate recipient. This is for you and your committee to decide.

Reviewer groups – Chair Only (this can also be anyone setting up the group)

1- Login to KSN as an "Administrator".



Once logged in, make sure your view is set as “Administrator”. If not, hover over your name and make sure you to click on “Administrator”.



IMPORTANT REMINDER

2-Please provide the K-State University Foundation (KSUF) Compliance staff a list of funds you would like reviewed by your reviewer along the review period beginning and ending dates at ksn@ksufoundation.org.

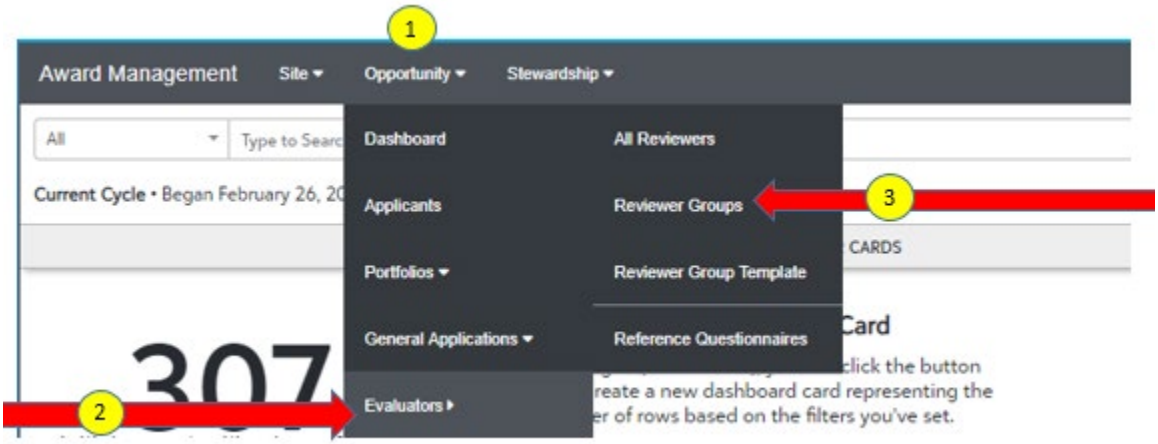
The Compliance staff will input these dates in the system and confirm with you once those dates have been added. Once confirmation has been provided by the KSUF Compliance staff, you may start creating your reviewer groups.

IMPORTANT REMINDER

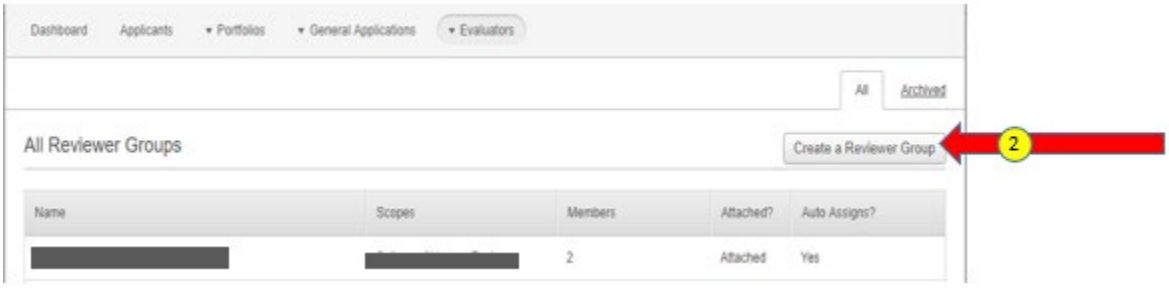
Creating Reviewer Groups (creating groups, adding reviewers, qualifications, questions, rubrics)

Do not forget to click on the "update" or "save" button under each tab if any changes were made.

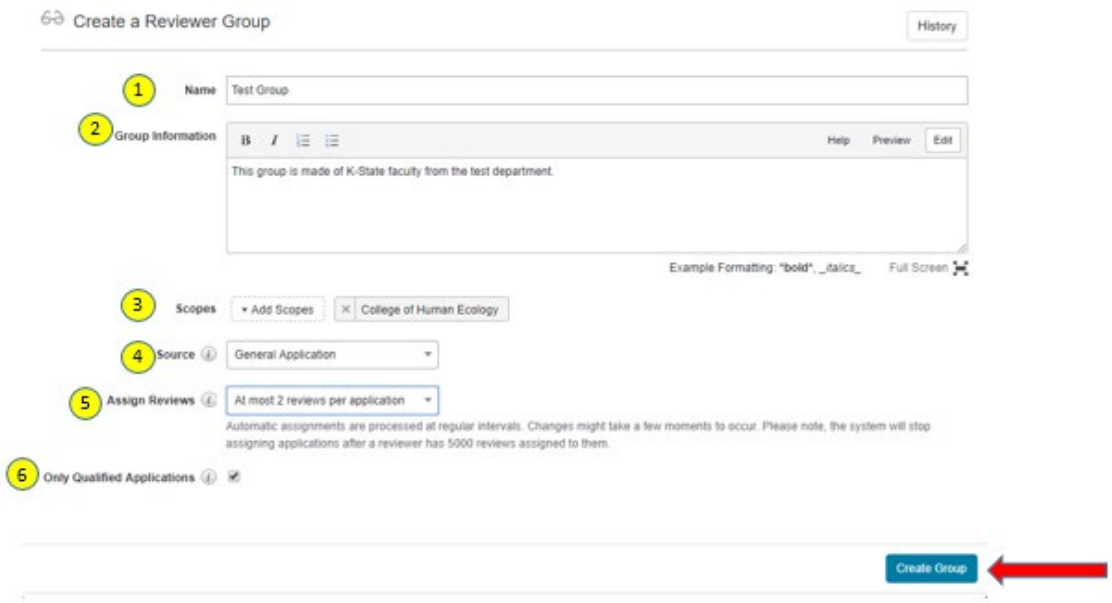
Step 1:
1-Click on "Opportunity".
2-Click on "Evaluators".



Step 2: Click on "Create a Reviewer Group".



Step 3: You will then see a screen similar to the one below to complete.



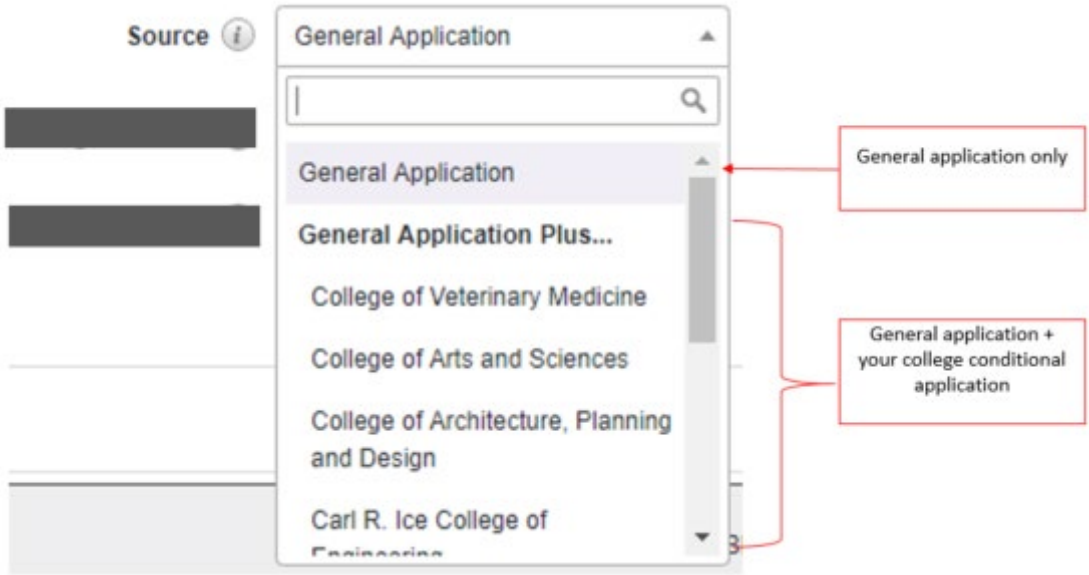
1-Name (not seen by reviewers): choose a name for your committee group.

2-Group Information (not seen by reviewers, only visible to the chair): this can be a description of who makes up this group.

- Ex: This group is made up of faculty members or this committee evaluates all applications for scholarships in the college of…

3-Scopes: this allows you to assign a scope that only belongs to your college/department.

4-Source: You will see an option for "General Application" and one for the "General Application Plus you conditional application for your specific college". You can choose whether you would like your reviewer(s) to solely review the applicant(s) general application(s) or the general application(s) PLUS the conditional application(s).

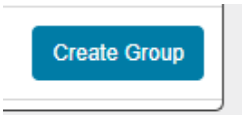


5-Assign Reviews (two options):

- **Manually** (very manual process): this means that you will be able to manually select individual applications to be assigned to individual reviewers. (As the number of applications increases, this can be a very labor-intensive setting).
  Example: If you have a situation where there are conflicts of interest and an application cannot be assigned to a particular reviewer, then it is recommended to utilize this option. If neither scenario applies, it's strongly recommended that you utilize "automatically assigning applications" – Further instructions available in **Step 6, number 6**.

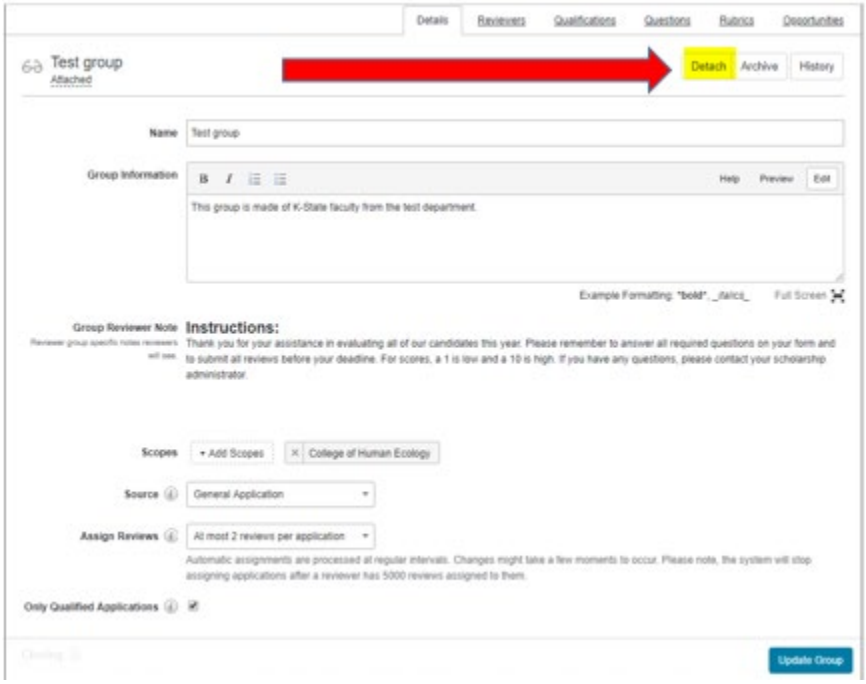
- **Automatically:** your reviewers will be automatically assigned to applications.
  Example: selecting at most 2 reviews per application means that each application has the potential to be reviewed by 2 different reviewers, but will be reviewed no more than 2 times.
  - Automatically assign every application to every reviewer: all applications will be automatically assigned to all reviewers within the group
  - Automatically assign at most 1 review per application: each application will be automatically assigned to one reviewer. And so on up to 5 reviews.

6-Only Qualified Applications: if this is checked, the system will only assign applications at the submitted category (excluding those in the drafted category).

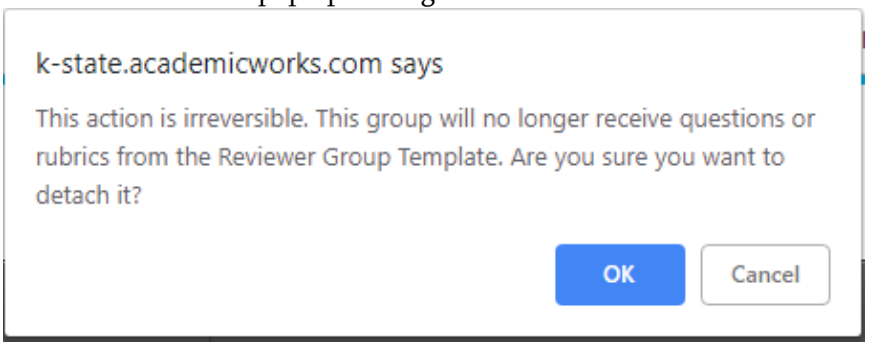


Note: you are able to update information on the group once it's been created. Be sure to click on "update group" to save your information.

Step 4: Once you have created the group by clicking "Create Group" you will be taken to a screen similar to the one below where you will be able to "**detach**" the group from the default setting and create your own sets of questions or rubrics you choose to have this reviewed by your administrators.

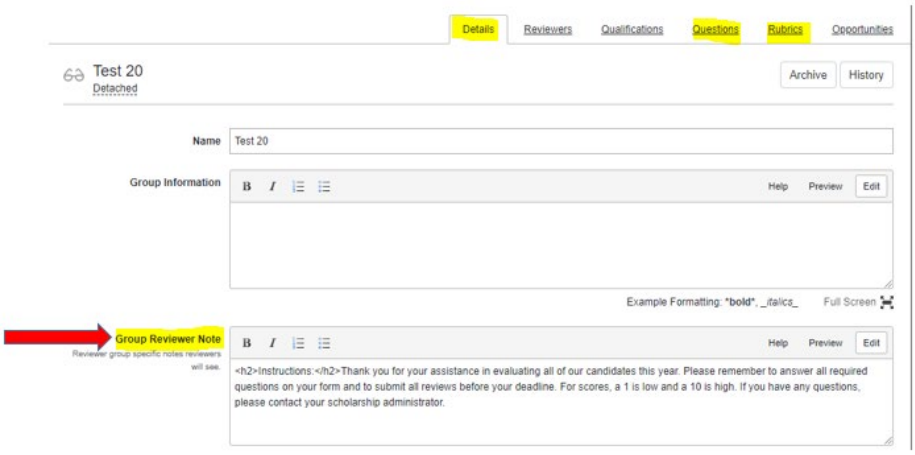


You will receive the pop up message below. Click “OK”.



Step 5: Once you have clicked “Detach” and “OK”, you will be able to edit the following fields and tabs:

- Group Reviewer Note located under the details tab (this field can be used for any instructions you would like to provide to reviewers in this group or to provide contact information for someone in your college/department to contact with questions). You will be able to edit this field once detached.
- Questions
- Rubrics



IMPORTANT REMINDER

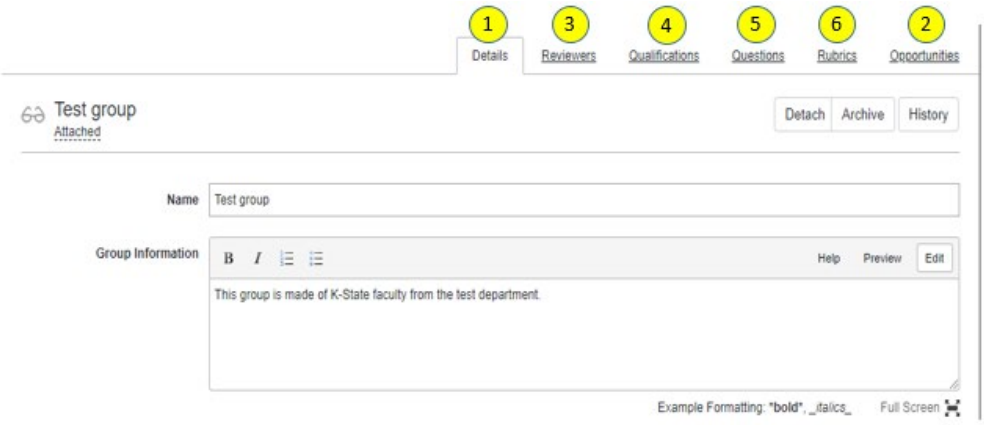
The ability to share student data with non-university employees is a decision to be made by the University not the Foundation. While KSN provides the ability to invite outside reviewers, the University still needs to investigate a process to ensure external reviewers have gone through the proper steps to ensure compliance with FERPA and other regulatory issues.

The decision has been made by the University to limit the reviewer process and email invitation solely to K-State internal faculty and staff members at this time. This will continue to be an issue to be addressed in the future.

IMPORTANT REMINDER

Step 6: Complete the following tabs as necessary

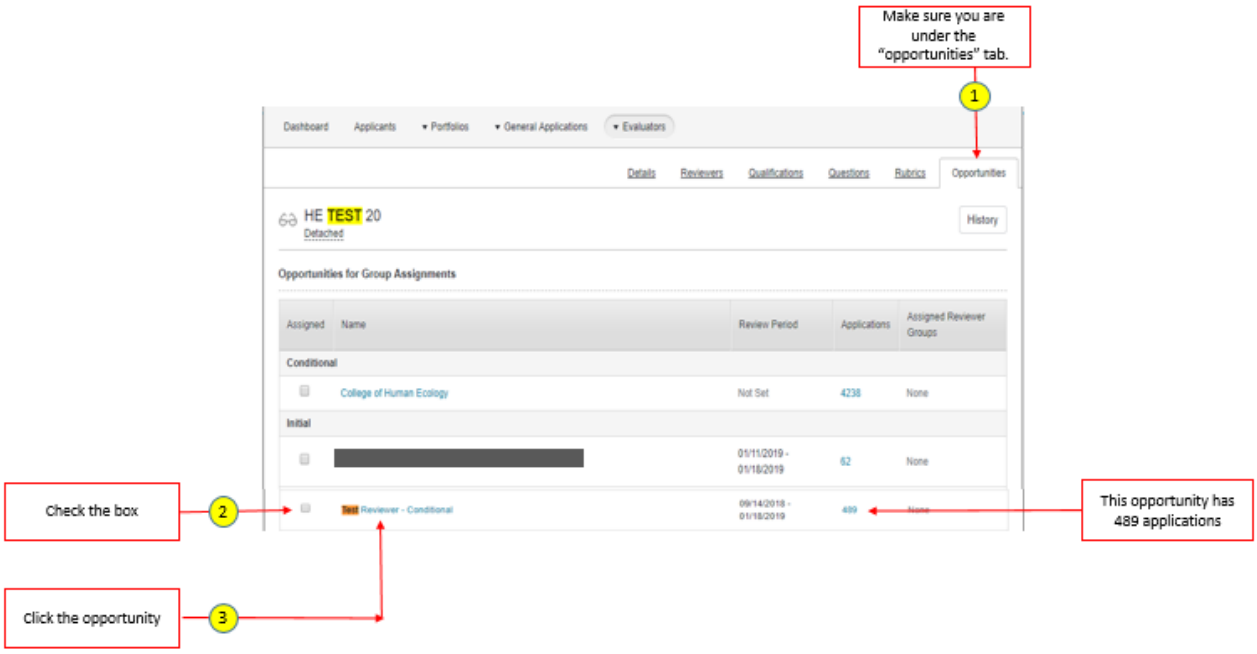
Do not forget to click on the "update" or "save" button under each tab if any changes were made.

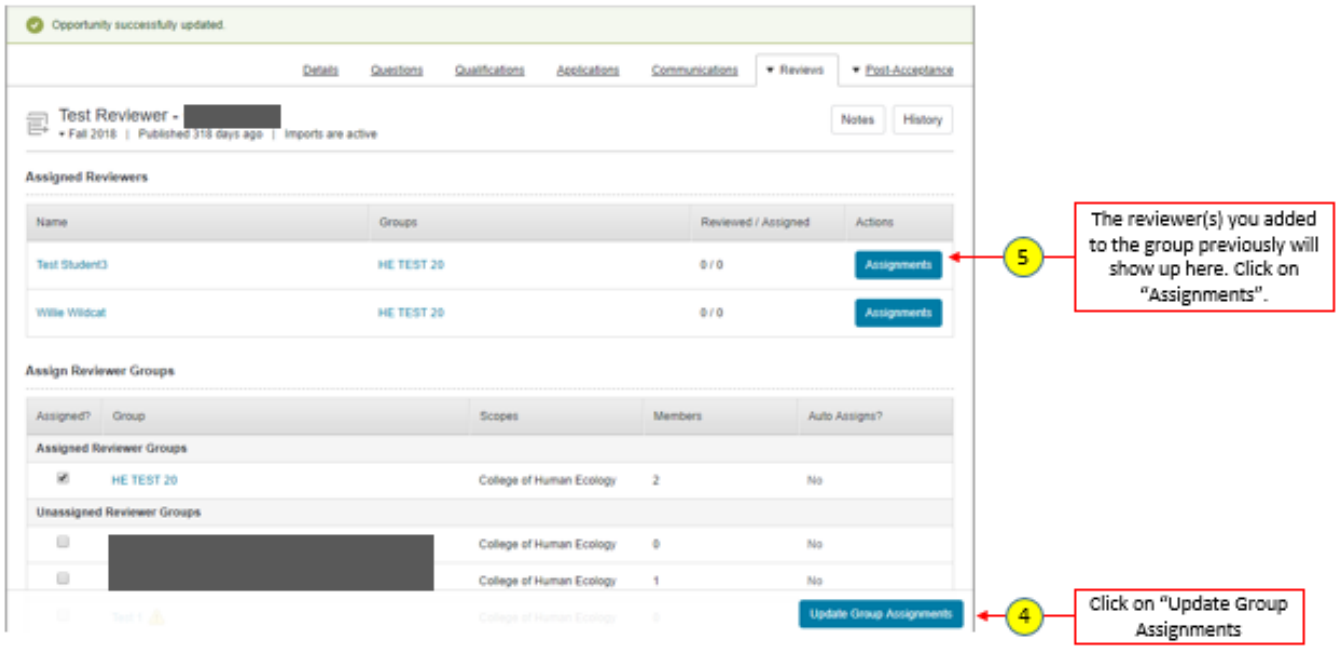


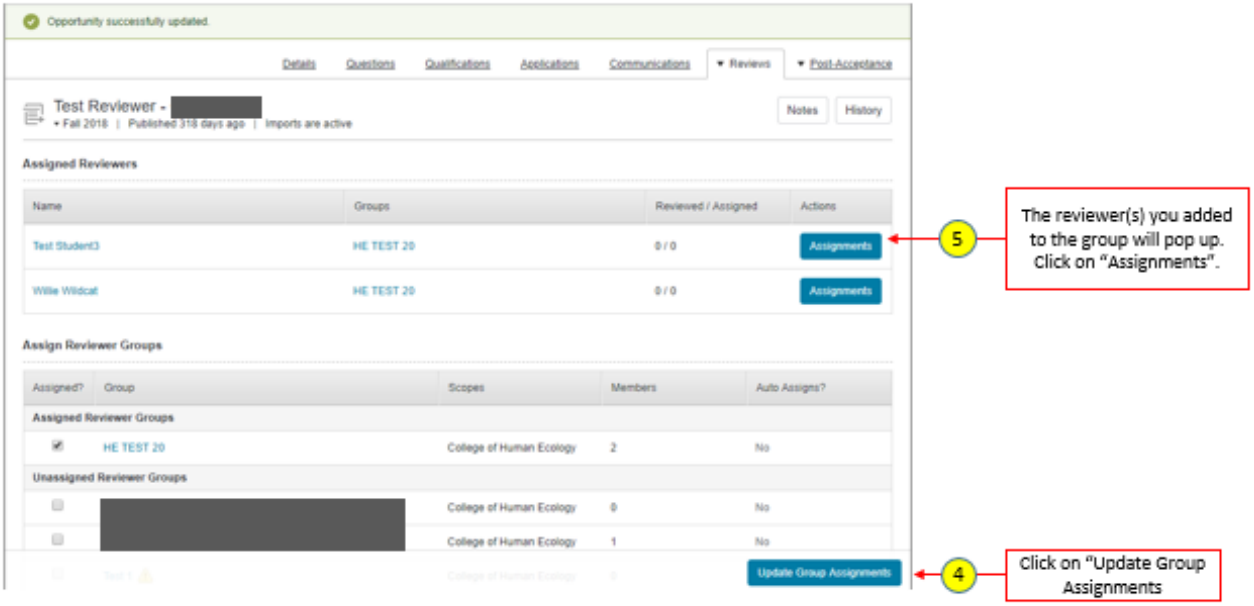
1-"Details" tab: contains settings and can be used to capture notes to reviewers on how to select appropriate candidates or who they may contact with questions.

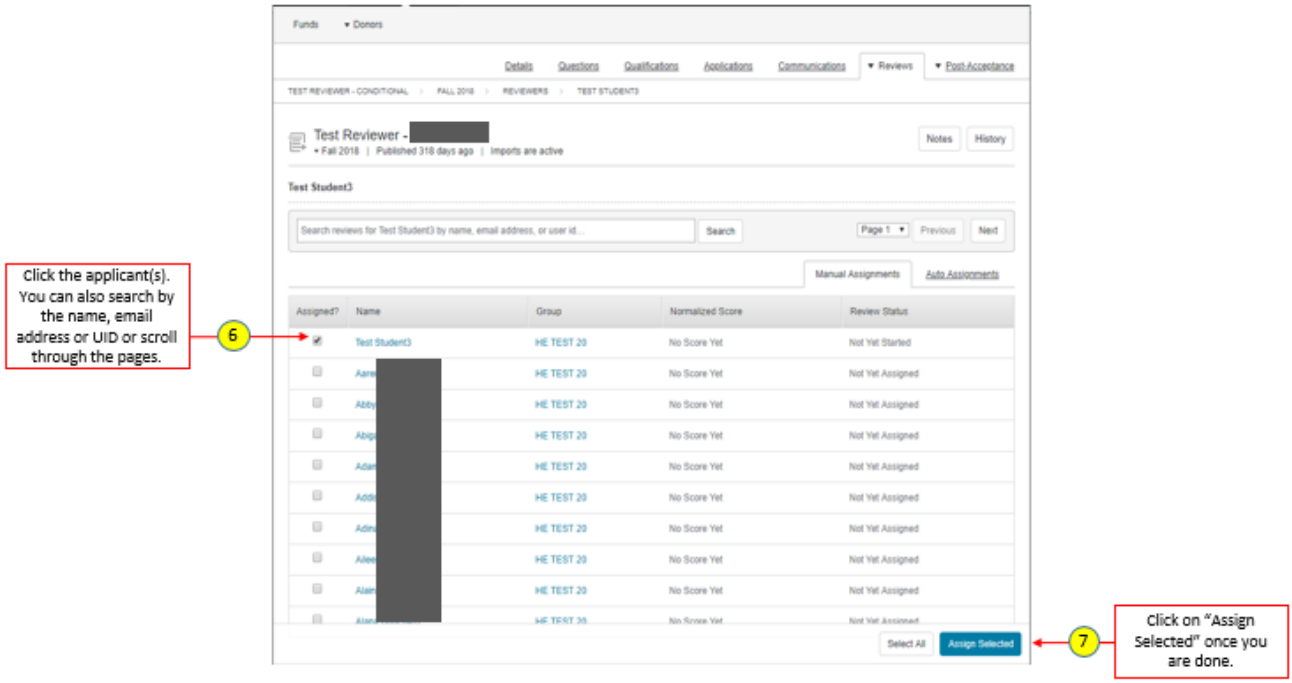
2-Opportunities: select the appropriate opportunities you would like reviewed by reviewers.

If you choose to "Manually" Assign Reviews in Step 3, please follow these instructions to manually select individual applications to be assigned to individual reviewers.


Make sure you are under the "opportunities" tab.
1
Dashboard
Applicants
Portfolios
General Applications
Evaluators
Details
Reviewers
Qualifications
Questions
Rubrics
Opportunities
HE TEST 20
Detached
History
Opportunities for Group Assignments
Assigned
Name
Review Period
Applications
Assigned Reviewer Groups
Conditional
College of Human Ecology
Not Set
4238
None
Initial
01/11/2019 - 01/18/2019
62
None
Test Reviewer - Conditional
09/14/2018 - 01/18/2019
489
Check the box
2
This opportunity has 489 applications
Click the opportunity
3


Opportunity successfully updated.
Details
Questions
Qualifications
Applications
Communications
Reviews
Post-Acceptance
Test Reviewer -
Fall 2018 | Published 318 days ago | Imports are active
Notes
History
Assigned Reviewers
Name
Groups
Reviewed / Assigned
Actions
Test Student3
HE TEST 20
0 / 0
Assignments
Willie Wildcat
HE TEST 20
0 / 0
Assignments
5
The reviewer(s) you added to the group previously will show up here. Click on "Assignments".
Assign Reviewer Groups
Assigned?
Group
Scopes
Members
Auto Assigns?
Assigned Reviewer Groups
HE TEST 20
College of Human Ecology
2
No
Unassigned Reviewer Groups
College of Human Ecology
0
No
College of Human Ecology
1
No
Update Group Assignments
4
Click on "Update Group Assignments





1-Make sure you are under the "Opportunities" Tab of the reviewer group
2-Check the box
3-Click the opportunity or opportunities you would like to assign. Refer to step 6 if you are unsure on how to get to the "Opportunities" Tab of the reviewer group.
4-Click on "Update Group Assignments".
5-The reviewer(s) you added to the group earlier on in the process will show up. Click on "Assignments" to assign applications to your reviewer(s).
6-You can search by name, email address or UID or scroll through the pages to view additional applicants.
7-Click on "Assign Selected" once you are done.

Do not forget to click on the "update" or "save" button under each tab if any changes were made.

3-Reviewers tab: this allows you to add reviewers to the group
Note: Make sure to add all your reviewers to your group ***at least a day ahead*** *of the review period starting date.*

*If the K-State internal faculty and staff members who you intend to invite as a reviewer is not populating in KSN, please type their email address.

To add a Reviewer

- Click Add Reviewers
- You may either use the search bar to select existing users in your system, or you may add numerous new email addresses at once by typing each new address on a new line and then clicking the "Add or Invite" button. These users will then appear in your Reviewers list, and will be available to include in any Reviewer Group

How will the reviewer be contacted?

Once the new Reviewer user has been assigned at least one application for review and the Review Date for the associated opportunity (or the General Application) has arrived, they will be sent the Reviewer Assignment Notification email alerting them to new reviewing assignments. If this user has never been in the system before, the email will also contain a confirmation link to assist them in establishing their account. **No emails will be sent to reviewers unless:**

- the Reviewer has been assigned applications to review (work to do)
- the applications are on or past the Begin Review Period date, but the End Review Period date has not yet arrived
- To reduce the number of emails sent to these users, the system consolidates all changes to the Reviewer's assignments into one daily "digest" Reviewer email, sent each evening at 3 AM (CST). This is the only time at which Reviewer emails will be sent out by the system.

To remove a Reviewer from a group

- Locate the reviewer on the list
- Under the Role column, select None from the dropdown box next
- Click Update Reviewers
    - When the page reloads, the user should be removed from the list of those with Reviewer portal access. The user will still have an active account, they just will no longer have access to the Reviewer portal or have any evaluations assigned to them.)

What happens to saved or submitted reviews if I remove a reviewer from a group?

If your group is set to automatic assignments:

- The reviewer will no longer see this information in their portal
- The score will be removed from all calculations
- If that user is later added back to the group:
    - The existing saved/submitted reviews (with scores) will be restored to the portal
    - The scores will be restored to all calculations, including the All Reviews grid with no additional intervention

If your group is set to manual assignments:

- The reviewer will no longer see this information in their portal
- The score will be removed from all calculations
- If that user is later added back to the group:
    - Formerly assigned applications not yet begun will be restored
    - The existing saved/submitted reviews (with scores) will be restored to the portal
    - The scores will be restored to all calculations, including the All Reviews grid with no intervention

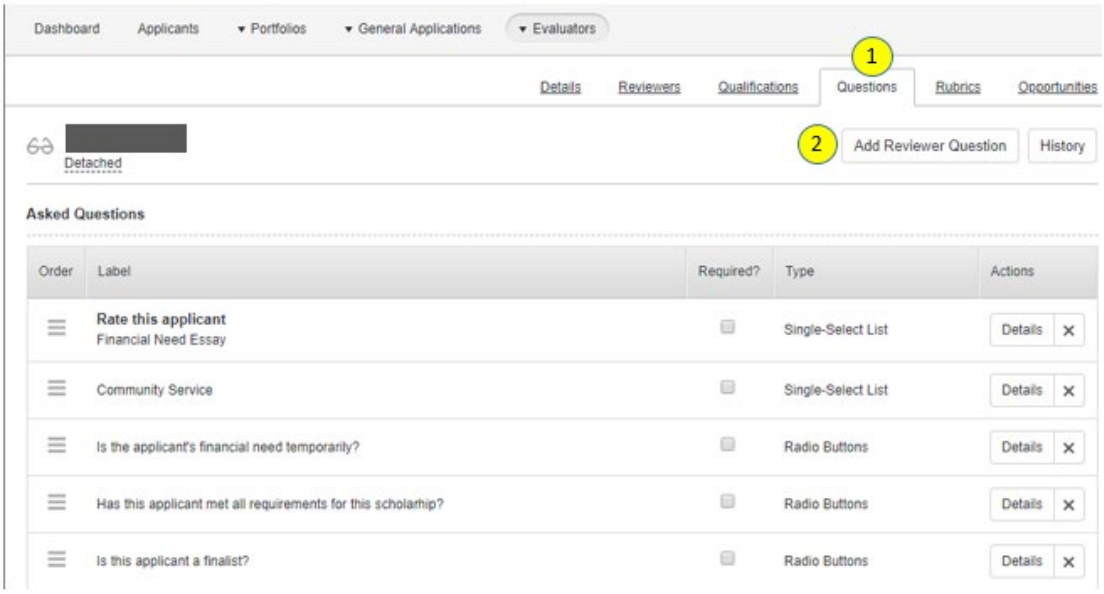
Do not forget to click on the "update" or "save" button under each tab if any changes were made.

4-Qualifications (optional): this allows you to further filter reviews that are assigned to the group through by setting additional qualifications on the review level.

Example: if the criteria is set for 3.0 and above Cumulative Undergraduate GPA and you have 200 applicants. Adding an additional qualification to bring in GPA greater than 3.8 may reduce your pool to 20 so you're reviewers aren't reviewing a large pool of applicants. *This is optional and is up to you and your committee to decide whether this is a feature to use.*

5-Questions (optional): The questions tab is where you may include a series of questions that will be asked of your reviewers.

Example: Is this applicant a finalist? Why do you feel this applicant is the best choice? Is this applicant's financial need temporarily?



Creating a new question

- Type in the question into the question box.
- For a single question, click "Single Question" to create just one question. Enter the question text, select the question type, and enter a maximum word count (if applicable). Click "Add" and click "Save Question"
- For a question set, click "Question Set" to create a questions set. Enter the question set text to add the subsequent question(s) text(s), select the question type, and enter a maximum word count (if applicable). Click "Add Another Question" to this set to enter your additional questions. Click "Save Question".

Adding an existing question to the template

To add an existing question (including one you just created) to the reviewer group template, click the "**+**" button next to the question. Close the question window, and click "Update Questions"

- Edits: Click the Edit button next to the question to edit the question and/or answers.
- Removal: Remove a question from the template by clicking on **X** button beside the question.

Few best practice recommendations to keep in mind as you create new questions for your set:

Sorting and Ordering: Question in a set "Question set" are ordered alphanumerically. So, be sure to number questions in your set (ex: 1., 2., 3., or a., b., c.,) to control the order of their appearance. The system will only recognize the numbers 1-9. If you intend on having more than 9 questions within a set, you should use the alphabet (for up to 26 questions).

6-Rubrics: this allows you to create your own rubrics.

- Name: Text or label of the rubric
- Min Score: lowest score possible
- Max Score: maximum score possible
- Offset: the intervals between scores. For example, an offset of "1" allows 1, 2, 3, 4, etc. and an offset of "2" allows 2, 4, 6, 8, etc.
- Weight: If there is an element you would like to carry more overall importance (such as Financial Need or Unusual Circumstances), you may "weight" it by a multiplying factor so that it produces a larger number (and thus raises the overall score for the application/applicant)

  Please note: the weighing number is the multiplying factor only. It does not calculate percentage value of the total overall score.

  Example: if you enter 10 and an applicant is given an overall score of 3, then the 3 will be multiplied by 10, so 30.

  Example: If a reviewer assigns a 3 for financial need to a student and the weight is set to 2 then the student will receive a 6 for financial need. The 6 is then added together with the other rubric scores to produce a total.

  To edit a created rubric:
- Click Edit beside the name of the rubric to make any necessary changes.
- Click Update Rubric

  To disable a rubric:
- Click Edit beside the name of the rubric.

- Click Update Rubric.

Details | Reviewers | Qualifications | Questions | Rubrics | Opportunities

Test 20
Detached

History

New Rubric

Name

Help Text

B I

Help Preview Edit

Example Formatting: *bold*, _italics_ Full Screen

Min Score 0

Max Score 10

Offset 1

Weight 1

Create Rubric

Enabled Rubrics

Order	Name	Min Score	Max Score	Offset	Weight	Actions
	Give an overall rating of this application	0.0	10.0	1.0	1.0	Edit
	Financial Need	0.0	10.0	1.0	1.0	Edit
	Academic Performance	0.0	10.0	1.0	1.0	Edit
	Supplemental Materials	0.0	10.0	1.0	1.0	Edit
	Overall Impression of Applicant	0.0	10.0	1.0	1.0	Edit

Applicant Grid view as a reviewer chair – Chair only

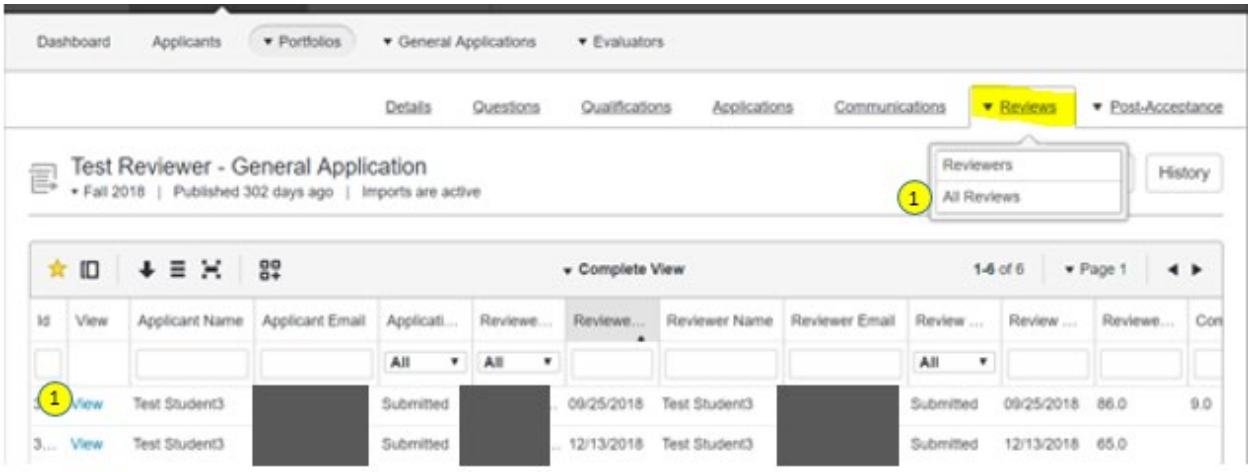
The reviewer chair will be able to see selected applicants in their application grid and their scores. Recipients will not be automatically selected. Each committee must discuss the outcome of their reviews amongst themselves as well as identify their recipients.

Viewing Reviewer Scores and Comments as a chair – Chair only

OPTION 1 – recommended option

1-Hover over "Reviews" to see both Reviewers and All Reviews completed. Click on "All Reviews" to view the individual review grids.

Click on "View" to see the reviewer's rubric ratings, answers and comments if applicable.



The selection process

It may be best to select an alternate or two scholarship recipients in case, the first (1st) recipient becomes ineligible before the awards are paid out without requiring the committee to select an alternate recipient. This is for you and your committee to decide.

Once the committee has chosen a recipient(s), the reviewer chair must verify that the recipient(s) are qualified. Some scholarships may require information that may not be in KSN such as GPA in major, major professor, or require coursework, etc. It is up to the committee to review other software to help them with this process.

Follow step 1 through 7 under **"Making an award to an applicant"** if you are unsure on how to make the award to the selected recipient.

OPTION 2

You will need to switch your view from “Administrators” to “Reviewer”. This can be done by hovering over your name at the top left corner and clicking on the “Reviewer” role.

1-Click “Review to Chair” under the reviewer portal to see the reviewer grid. This will display the same grid shown under “OPTION 1”.

The “reviews” tab reveals a grid of the reviewer name, applicant name, review category, etc. This grid allows you to monitor reviewers to see how they are coming along with the review process. You’ll see the category that each reviewer is in, including drafted, submitted, or those that have not yet started. You can sort, move, save grids, download the grid as you would in a regular grid. You can also sort by the applicant name or reviewer name to see how they are coming along.

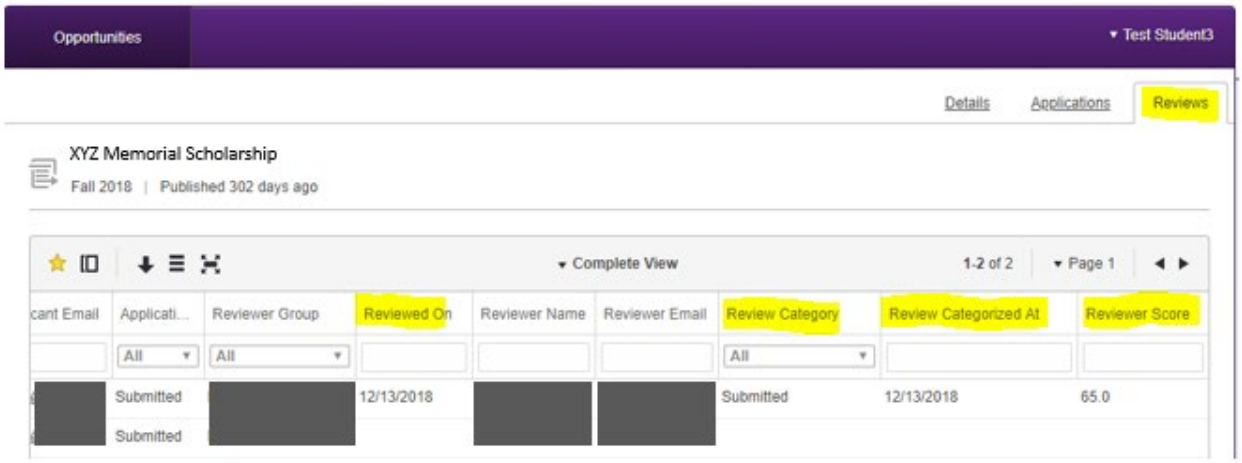
Reviewer Category:

- Submitted: completed reviews.
- Drafted: reviews have been started but have not been submitted.
- Blank: reviewer hasn’t started their review.

Reviewer grid helpful tips:

- Reviewer Categorized at: date they were moved into that category.
- Reviewer score: Average reviewer score.
- Reviewer Comments: Any comments provided by the reviewer (if applicable).
- Report: you can download the grid into an excel file.

KANSAS STATE UNIVERSITY

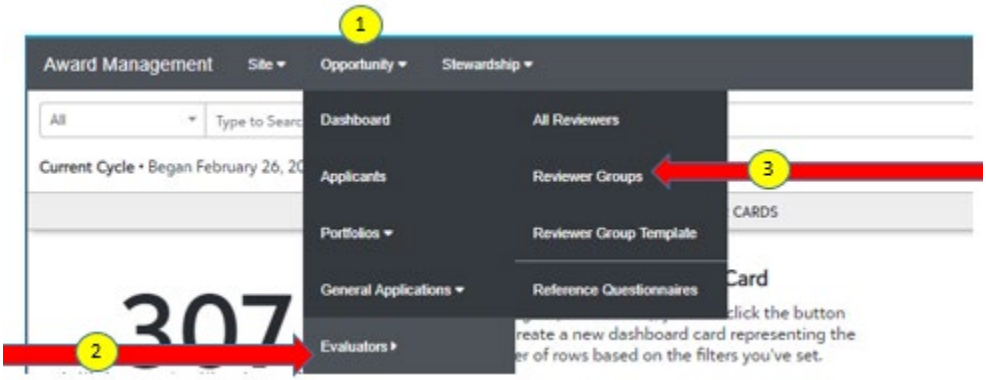


Reassigning reviews if a reviewer cannot complete them

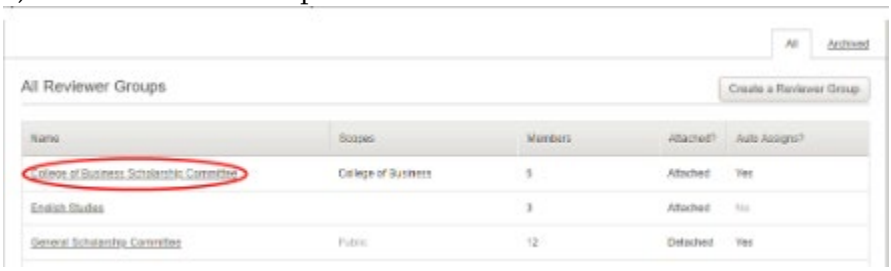
There might be situations in which a reviewer cannot complete their assignments. If your reviewer group is setup to "automatically assign" and is not setup to assign "Every Application to Every Reviewer", the reviewer can be locked. Locking a reviewer will remove any un-submitted reviews (including started but not completed saved reviews) from the reviewer, and it will reassign those reviews to other members of the same group. The system will distribute this work evenly across the remaining reviewers. Any reviews already submitted by the reviewer will remain with the reviewer, and no new applications will be assigned to the reviewer.

Follow these steps in order to lock a reviewer:

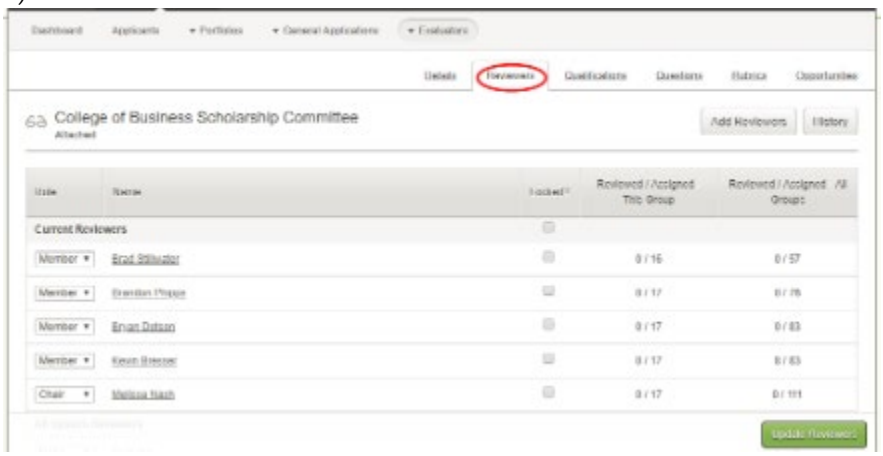
1) Click "Opportunity" > Click "Evaluators" > Click "Reviewer Groups".



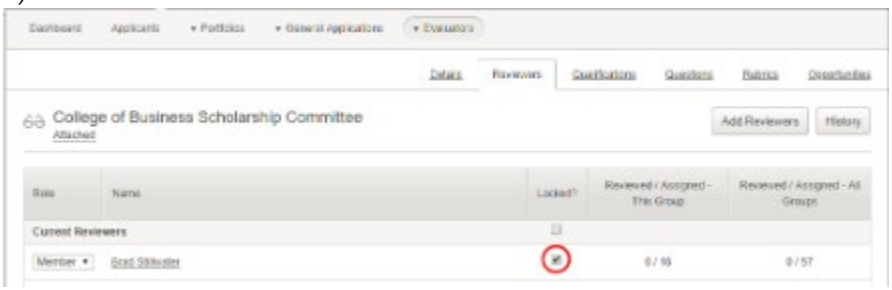
2) Select Reviewer Group where the reviews need to be redistributed



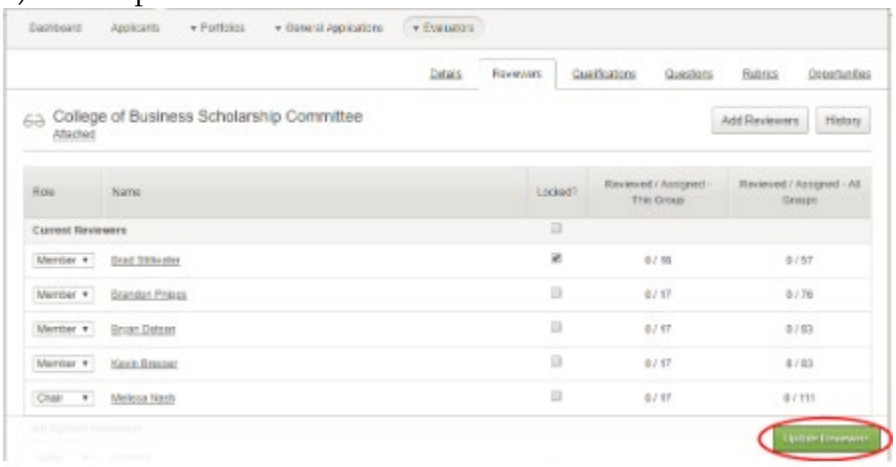
3) Select the Reviewers tab



4) Mark the “Locked?” checkbox next to the reviewer that is unable to complete their reviews



5) Select Update Reviewers



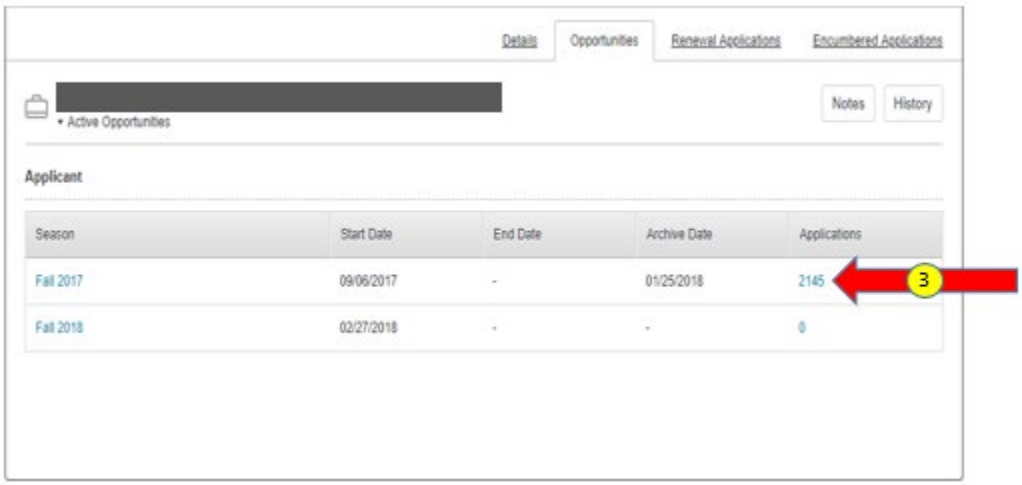
Viewing Applications from a Previous Cycle

There may be an instance where you would want to view applications from a previous cycle to verify a current applicant has not previously been awarded a specific scholarship.

1-Click on the "portfolio details"

2-Click on the "Opportunity" tab.

3- Click on the application number to be taken to a grid of applications for that cycle.



Note: When cycle management (archiving of the old opportunities) occurs, changes to applications from the previous cycle can no longer take place. If you would like to confirm who was awarded the scholarship in a previous year in other ways than KSN, please contact the Office of Student Financial Assistance (SFA).

Renewal Settings

Helpful Tips:

1-Renewals are configured at the portfolio level. To configure the renewal settings, please return to the portfolio details after creating the new portfolio and configure the renewal opportunity. Once the renewal settings are configured, you are able to then configure the future renewal template.
Note: Only System Administrators will be able to configure the renewals.

2-The system will automatically apply the renewable applicant in the pool as long as they are not maxed out of iterations.
Note: The system will first apply renewable students in the pool then it will look for their qualifier. So, it is possible to come across a renewal applicant with the "0" qualification point.

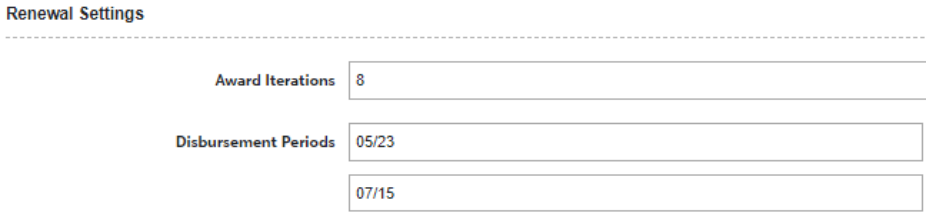
3-Renewal templates and renewal opportunities can have different qualification than the original opportunity. This means that system administrators can update the qualifiers on the renewal opportunity to be different that the qualification displayed in the renewal template.

Creating renewals settings at the portfolio level – System Administrators only

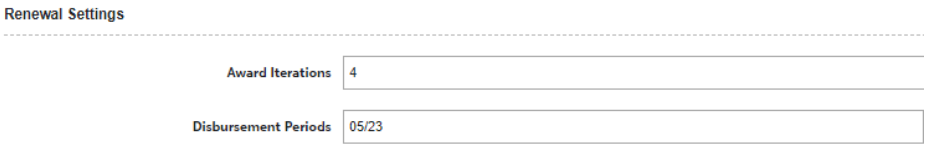
1-**Award Iterations**
The total number of award disbursements an applicant will receive (1 initial award disbursement + # of renewable award disbursements = # award iterations). Think of this as the number of times they are being awarded. One (1) award a year for 4 years would be 4 "Award Iterations".

Common Scenarios

If a recipient will get the award for 4 years and the award 2 times a semester, then you would add 8 in the iteration.



If a recipient will get the award for 4 years and the award 1 time a year, then you would add 4 in the iteration.



Note: If the award iteration is set to 1, it will not be eligible for renewal.

2-Disbursement Periods

A. **Start Date (MM/DD)** – there is no need to include the years, just the month and date.
   - The "Start Date" is the day that renewal applications for eligible recipients will be generated. This is the first (1st) day administrators will be able to request additional information from renewal applicants, if applicable.

   - The start date MUST at least be one (1) day in the future

B. **End Date (MM/DD):** ONLY use the end date if you need to collect documentation directly from applicants on the general application, conditional or supplemental renewal application information. If not, it is not necessary to set an end date if you do not plan on collecting additional information. If an award renews or is disburse more frequently than twice per year, you can add additional Renewal Periods.
   - The end date is the date applicants must have their information submitted and can no longer update or complete the renewal application.

3-Add Another: this allows you to add additional disbursements.

4-Selective Renewals box: this is not recommended to use unless a renewal award will be made for odd terms such as summer. If selected for a disbursement period, renewal applications **WILL NOT** be automatically generated into the renewal opportunity during this period. Instead, administrators **must manually place applicants** into consideration for renewal disbursement during this period.

This is a special disbursement period where awards are ONLY extended to SELECT STUDENTS who require a disbursement of fund during that period.

Example: a student enrolling in summer coursework as the student is likely not to take courses every summer and likely not to receive it every summer.

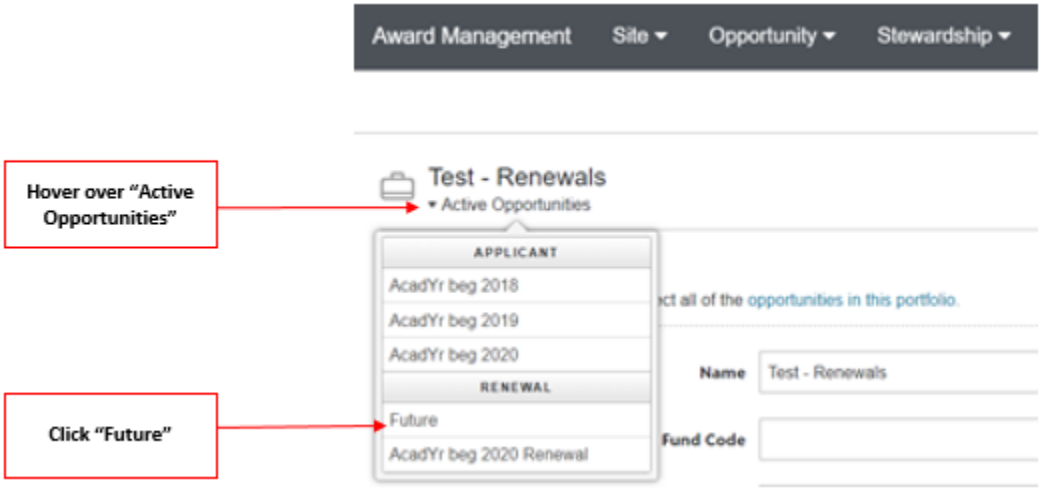
- You can skip the selective renewal and create it at any point in the future if you aren't sure you want to use it.
- Administrators must manually place applicants into consideration for a renewal disbursement during this period.
- Selective means no one would show up at all in the pool for that iteration. This is more like force-applying where you would have to select the student yourself.
- Note: On the selective renewal period's Start Date, a new renewal opportunity will appear in the portfolio.

  Unlike regular renewal periods, the selective renewal period will not automatically generate renewal applications for all renewable applications. Instead, schoalrship administrators must manually select award recipients who should receive a select disbursement.

Configuring the future renewals template – System Administrators only

After you have created the Renewal Settings at the porfolio level, you will need to make a few additional decisions on the Future Renewal template. To access the future renewals template for the portfolio:

- Hover over the phrase "Active Opportunities" under the name of the Portfolio, and click "Future" under the "Renewal" section.



The page displayed holds the template for all "future" renewal award applications. From here, administrators can make decisions about funding availability if applicable as well as other information that may be needed to process a renewal application.

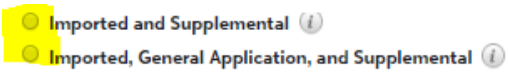
Note: The numbers will not be locked in when the renewal period begins, so if something should change prior to the awarding of renewals, administrators will be able to adjust these amounts accordingly.

- **Awards:** the future renewals template allows you to predetermine how much funding will be available for the upcoming renewal period
- **Opportunity Awards:** the total number of renewals awards that will be given out during the upcoming renewal period
- **Source:** this section allows you to designate how you intend to gather necessary information information to assess compliance with renewal award requirements. For example you may need to know:
    - Is this student still enrolled?
    - Are they making satisfactory academic progress?

Note: If the Imported, General Application, and Supplemental Source is selected, the "future" renewals template will display a new "Questions" tab or a new "Qualifications" tab depending on the selected source. Refer to the "Source options" on identifying which source to select

Adding Supplemental Renewal Application Questions (optional) – System Administrators only

Please reach out to the K-State University Foundation (KSUF) Compliance staff at ksn@ksufoundation.org or whomever may be elected in this role a list of required questions that are needed to be added to the renewal applications if applicable.



Remember: applications will already include information from the data import file and the general application, if selected. So there is no need to ask for this information a second time on the supplemental application.

The questions tab is where you may include a series of questions that will be asked of your applicants.

Creating a new question

- Click Questions Tab then click "Add Applicant Question". Create new or choose existing question library (re-arrange or make them require).
- Type in the question into the question box.
- **For a single question**, click "Single Question" to create just one question. Enter the question text, select the question type, and enter a maximum word count (if applicable). Click "Add" and click "Update Questions"
- **For a question set,** click "Question Set" to create a question set. Enter the question set text to add the subsequent question(s) text(s), select the question type, and enter a maximum word count (if applicable). Click "Add Another Question" to this set to enter your additional questions. Click "Save Question".

Note: *if you do not click on "Update questions", the system will not retain any questions that may have been added or created.*

Adding an existing question to the template (this would be an instance where questions are already available in the template) – System Administrators only

To add an existing question (including one you just created), click the "+" button next to the question. Close the question window, and click "Update Questions"

- Edits: Click the Edit button next to the question to edit the question and/or answers.
- Removal: Remove a question from the template by clicking on **X** button beside the question.

Few best practice recommendations to keep in mind as you create new questions for your question set:
Sorting and Ordering: question in a set "Question set" are ordered alphanumerically. So, be sure to number questions in your set (ex: 1., 2., 3., or A., B., C.,) to control the order of their appearance.

The system will only recognize the numbers 1-9. If you intend on having more than 9 questions within a set, you should use the alphabet (for up to 26 questions).

Setting Renewal Qualification Criteria (optional) – System Administrators only

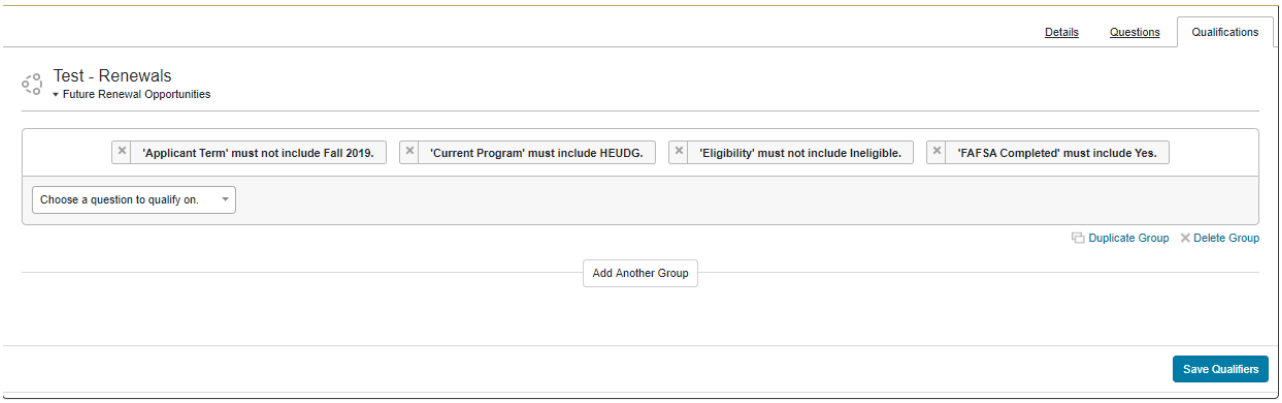
Unless "NONE" was selected as a source, system administrators should also add a qualification criteria to determine how applicants stay in compliance.

For example, if the criteria on the opportunity is set to 3.0 and above Cumulative Undergraduate GPA and your specific college or department requires applicants to have a GPA of 3.5 then the qualification can be set on the future renewal to identify which applicant is in compliance.

This allows you to further create additional qualifications on the renewal level other than the ones set on the initial opportunity. If the "future" renewal awards template uses "Imported, General Application, or Supplemental information (Refer to the "Source Options")

Although eligible renewal applicants will always appear in the list of Renewal Applications regardless of them meeting these qualifications or not, setting renewal qualifications can help administrators easily identify applicants in compliance or those who are no longer eligible for an award renewal.

To set qualification criteria for renewal awards, you will need to be in the "future" renewal award template and select the Qualifications tab. System Administrators will be able to set qualification criteria similar to setting qualification crtieria on an opportunity.



Source options – System Administrators only

- Imported: only data supplied from student information system.
  - Applicants will not need to take any additional step to provide anything further to have their award renewed
  - This required information will come exclusively from the import file, such as the applicant's current GPA, major.

- Imported and general applications:
  - Requires renewal applicants to submit a current general application. Administrators will be able to choose data points from imported data and/or general applications (such as: applicant's current extracurricular activities or community service) to assess compliance.
  - **Note:** This does not require administrators to utilize both imported data and general application data, it merely provides the option of using a mixture of information from either source.

- Imported and supplemental
  - Applicants are not required to submit a current general application in order to have their renewal application/award processed BUT will be required to sign-in & complete a special supplemental renewal application.
  - Administrators can request specific items such as an updated "thank you letter, financial info, proof of enrollment".
  - Administrators will be able to choose data points from imported and supplemental applications but not the general application.

  Note: you will be presented with a questions tab that system admininistrators can set questions that applicants must answer.

- Imported, general application, and supplemental
  - If selected, renewal applicants will be **required** to complete a current/new general application before being able to complete the supplemental renewal application

  Note: you will be presented with a questions tab that system admininistrators can set questions that applicants must answer.

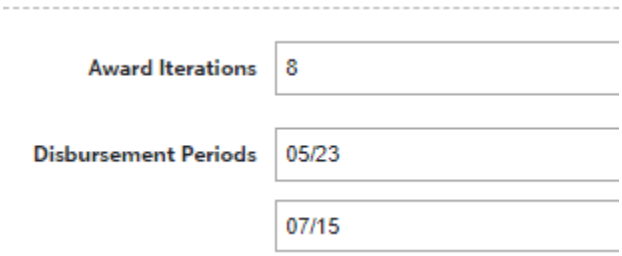
- None: this is not an automatic disbursement of funds. Scholarship Administrators will still need to take action to process renewal awards.
    - No information is required to assess whether or not an applicant is eligible for award renewal.
    - It is at the discretion of the administrator to award, deter, or cancel renewal disbursements.

Click update opportunity once done.

When will renewal opportunities appear?
Once the renewal settings have been configured at the portfolio level by adding the start dates for disbursement periods, indiciating which dates the applicant will be eligible for renewal then the renewal opportunities will be generated according to those dates.

The new renewal opportunities will only be generated on the date that has been indicated in the start date field for the disbursement period. So if your start date is 05/23, you should expect to see the new renewal opportunity appear on that date, and not before.

In the example below, 2 disbursements dates have been set, and the renewal opportunities would be created on May 23rd and July 15th.



Note: If you add a new disbursement period that is in the past, a "previous" renewal opportunity will not be generated.
Example: On May 23rd, you add a new disbursement date of April 1st to an existing portfolio, a new renewal opportunity will **NOT** generate for that new disbursement until the following April.

Final step
- Administrators do not need to take further action until the next renewal period start date arrives.
- At that time, the system will automatically generate a new renewal opportunity according to the settings in the future renewals template.
- The system will also automatically generate records for any applicant with remaining renewals disbursements so that administrators can process them appropriately.

Renewal Reminder Email – System Administrators only

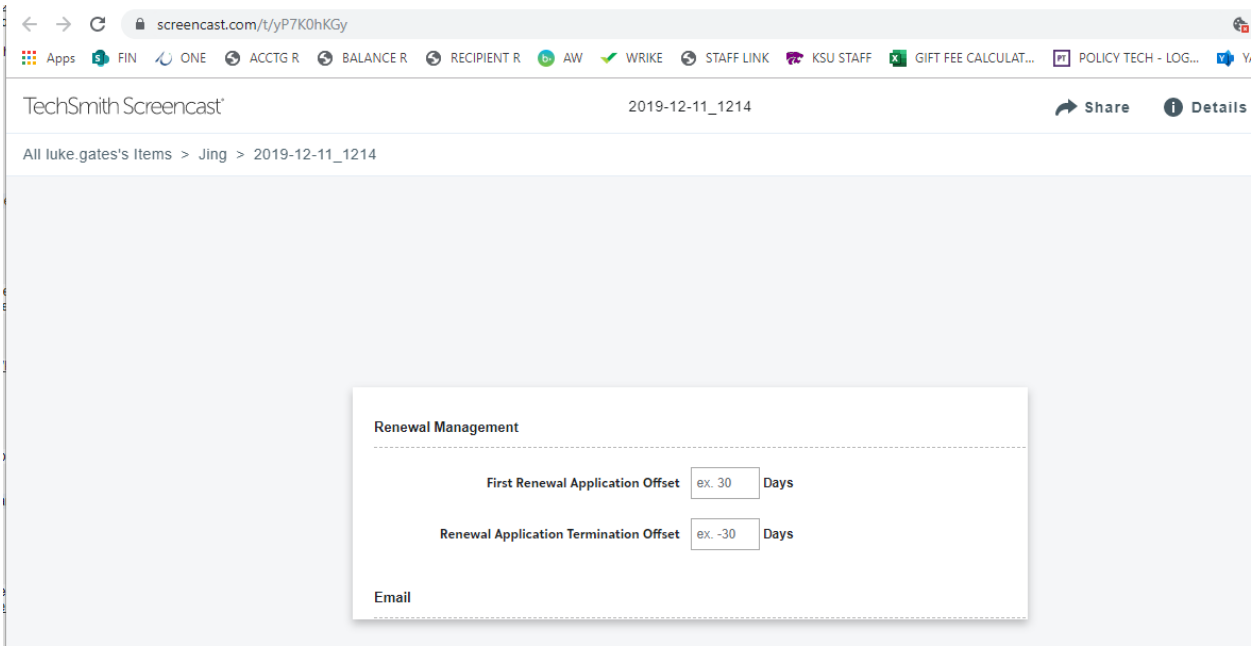
When renewal applications are available, system administrators with access to the message template can activate the beginning opportunity email by doing the following:

Click on Communications > click on “message template” > click on “beginning opportunities”. The email will trigger for renewal opportunities.

Note: do not change the information to a specific opportunity as this is the template for reminders for all renewable awards throughtout the system.

- **First Renewal application offset:** In order to prevent an applicant from receiving a renewal too soon after receiving the initial opportunity award, the first renewal application offset can be set in order to tell the system how many days after receiving the initial award that an applicant is eligible to receive a renewal.

  Note: The offset can only be setup by Blackbaud support. A system administrator will need to reach out to support and provide them with the offset days to be used.



- **Renewal Termination date:** By importing a date that an applicant’s renewals should end, such as graduation date, you can configure the imported field as a Renewal Termination date and automatically cancel any remaining iterations for the applicant that occur after that date.

  To designate an imported field as the Renewal Termination date:
  - select Site > Settings > User Imports. Select the correct field from the drop down menu located next to the Renewal Termination Date heading. Setting a Renewal Termination Date will prevent any renewal applications from being created for that many days prior to the termination Date, so that an individual graduating on May 1st, for example, would not be included on renewals that open on April 15th that are intended to be awarded in the upcoming fall.

- **Note:** To be able to assign a Renewal Termination Date, you must be importing a date that will act as the termination date. If your organization does not use a student data import file, or is not able to import a graduation date or other field that would indicate when renewals should automatically end for an applicant, you will not be able to configure a Renewal Termination Date.

  "Birthdate" is currently the only date field in our import file. You must have an additional data points containing a date field to utilize as a data point.

If there are required questions for applicants to answer on the renewal, they would receive the email template below. The message in the body of the email may be tailored differently.

Renewal Application Request - Email

If an applicant needs to complete a renewal application as part of Renewal Management, this email is triggered to request the applicant complete the renewal application.

Subject You need to renew your application for the {{ portfolio.name }} award!

Cc Address you@example.com

ksn@ksufoundation.org * anani@ksu.edu

Bcc Address you@example.com

ksn@ksufoundation.org * anani@ksu.edu

Body B I Help Preview Edit

Hi {{ applicant.name }},

Your application for the following opportunity {{ portfolio.name }} needs to be renewed. Please update your application at the link below:

"{{ application.applicant_url }}":{{ application.applicant_url }}

Thanks!

If there aren't any additional questions and are moved to the "Awarded" category, applicants would receive the following email. The message in the body of the email may be tailored differently.

Disbursement Awarded - Email

When an application is moved to a category that "Disburses Funds", such as "Awarded", an email is triggered to notify the applicant of the award.

Subject Your Opportunity Has Been Awarded

Cc Address you@example.com

ksn@ksufoundation.org * anani@ksu.edu

Bcc Address you@example.com

ksn@ksufoundation.org * anani@ksu.edu

Body B I Help Preview Edit

{{ applicant.name }},

Congratulations! Your award has been processed for the following opportunity: {{ portfolio.name }}. You can view the details of this award by visiting the following link:

"{{ portfolio.name }}":{{ application.applicant_url }}

Thanks!

Renewal application report admin communication message

For Administrators: Site > Communications > Message Templates > Administrators > Renewal applications report
Note: When generating an Excel report from a portfolio's Renewal Applications grid, these email and banner communications inform the requesting user that the report is available to download. Each includes a direct link to access the Excel file.

For Applicants: Site > Communications > Message Templates > Applicants > Renewal application request → this states "your application for the following opportunity needs to be renewed. Please update your application at the link below.

Note: This email is triggered any time an administrator moves a renewal application to the Requested category. The email informs the applicant that they must complete additional questions in order to submit their application for the renewal of an award.
The communication message will be visible to administrators; however only **system administrators** are able to edit the communication message.

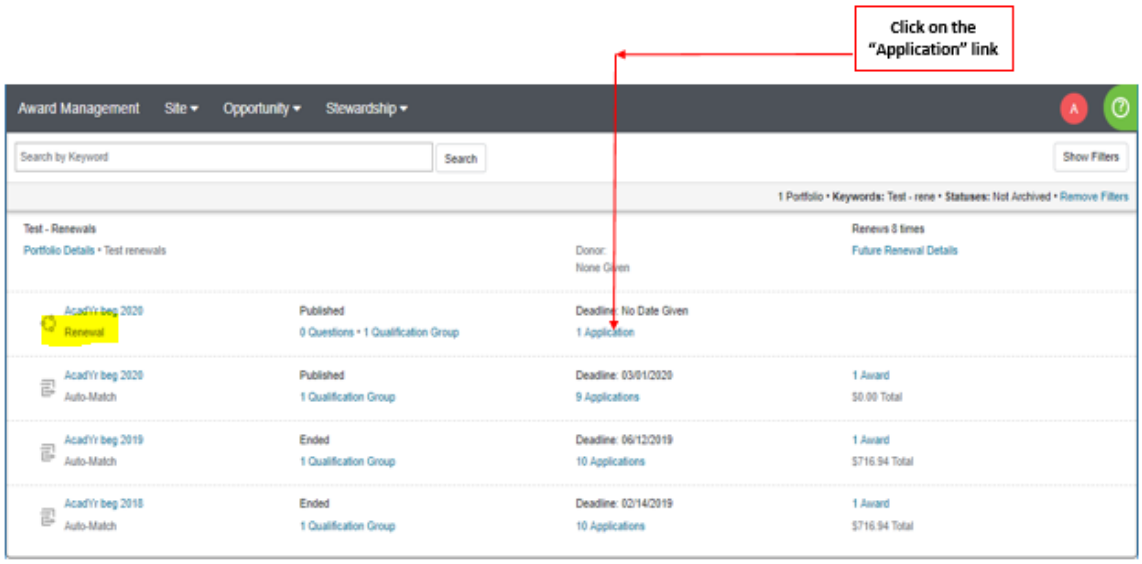
How to monitor renewal applications?
When a Renewal start date arrives for a renewal portfolio, the system will automatically generate a new renewal opportunity inside the portfolio (this can be seen by hovering over the portfolio)

The renewal opportunity will contain automatically generated renewal applications for any applicant eligible for renewal (if remaining renewal iteration are left). Clicking on the renewal opportunity's application link will direct you to the renewal applications.

After setting up the renewal management module, Scholarship Administrators will need to monitor renewal applications for processing. Administrators have a number of options when choosing to view renewal applications.

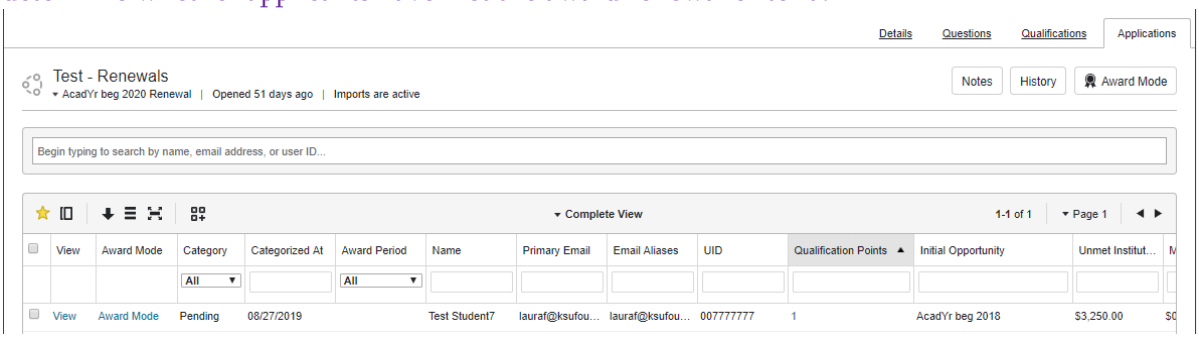
A-Monitoring renewal applications at the opportunity level – System and Scholarship Administrators
Note: whenever a renewal period start date arrives on a renewable portfolio, a renewal opportunity will be generated to collect any corresponding new renewal applications that require processing.

Select opportunity > portfolios > all > locate the desired renewable portfolio > click the "applications" link next to the appropriate renewable opportunity name > on the applications tab, you may view and process all current renewal applications as necessary



Once you're in the renewal opportunity's applications tab, administrators can monitor the status of each renewal as well as take action to process and distribute the renewal awards

Note: Verify the Qualification Points column and additional data in your grids or at your disposal to determine whether applicants have met the award renewal criteria.



For alternative methods of locating renewal applications at the portfolio level or system-wide, **please see the instructions in step "B through D"**

B-Monitoring renewal applications at the Portfolio Level – System and Scholarship Administrators

Note: Administrators can also view renewal applications from all unarchived renewal opportunities within a given portfolio:

- Select opportunity > portfolios > all > locate the desired renewable portfolio > click portfolio details.
- Within the portfolio, select the renewal applications tab.
- This page displays all currently active renewal applications from all renewal opportunities in the portfolio. You may view and process all current renewal applications as necessary.

C-Monitoring renewal applications at System Level – System and Scholarship Administrators

To view Renewal Applications from all portfolios in the system, administrators can use the following grids:
1-Renewal Applications Bulk Actions grid: Opportunity > Portfolios > Renewal Applications

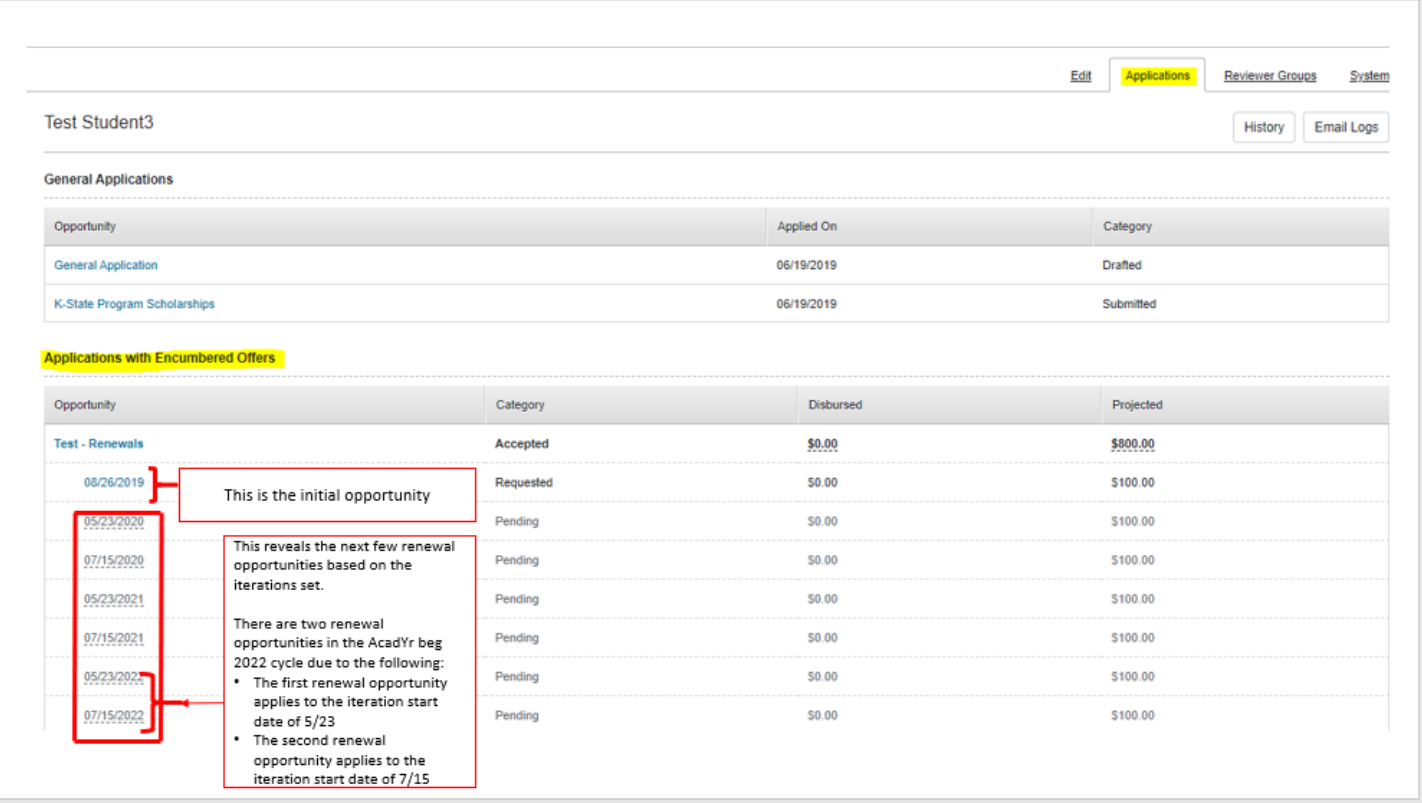
OR

2-Opportunity > Portfolios > Fund Disbursements

- Disbursment Type: search for the type of application under the "Disbursement Type" tab such as Renewal or Post-Acceptance.

D-Monitoring renewal applications at an Individual Applicant – System and Scholarship Administrators

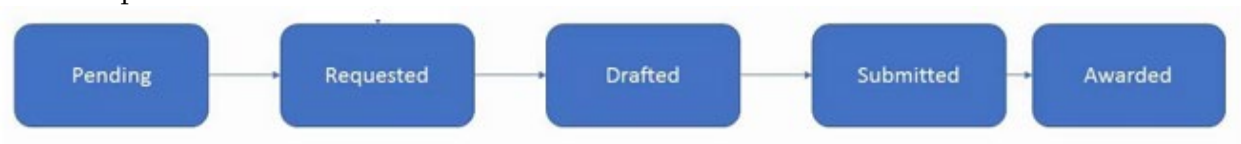
Note: Administrators may need to review renewable award disbursements over an extended period of time for a particular applicant:
-Select site > Users > All Users
-Search for the desired applicant by name, email or UID then select the correct applicant
-Click the Applications tab > Review the section titled "Applications with Encumbered Offers"
-If the applicant has been awarded with a renewable award, this section will list all past, present, and projected future disbursements of the award alongside their existing awards from other portfolios.



Changing categories to process and award renewals

Note: The renewal workflow is shared with the post-acceptance workflow

Post-Acceptance Workflow



Pending – A renewal application has been created. The system automatically generates renewal applications based on the disbursement periods that you have entered in the Portfolio. A pending status requires action from the administrator. You may either:

- Change the status to **Awarded** if all qualifications have been met by imported data (such as GPA), or
- Change the status to **Requested** if additional information is needed from the applicant (such as a General Application or Supplemental Application). An email will be generated to the applicant if the communication is turned on.

Requested – Supplemental information (from the General Application and/or Supplemental renewal application) is needed. This status triggers the Renewal Application email and initiates communications to the applicant.
Note: this category will not be available if you are only using imported data to qualify for renewals, and not requiring supplemental questions be answered.

- **Adjusting award amounts**
  While an award amount is assigned to an application when it's created within a renewal opportunity that will be the same as their initial award, administrators are able to adjust this amount to reflect the appropriate renewal amount when moving application in the **Requested category**. Simply add the new award amount when re-categorizing.

Note: This WILL NOT encumber the application but will allow administrators to relay the updated amounts to the applicant upon completing the supplemental questions.

Drafted – The applicant has started the General Application or supplemental renewal application but has not completed it.

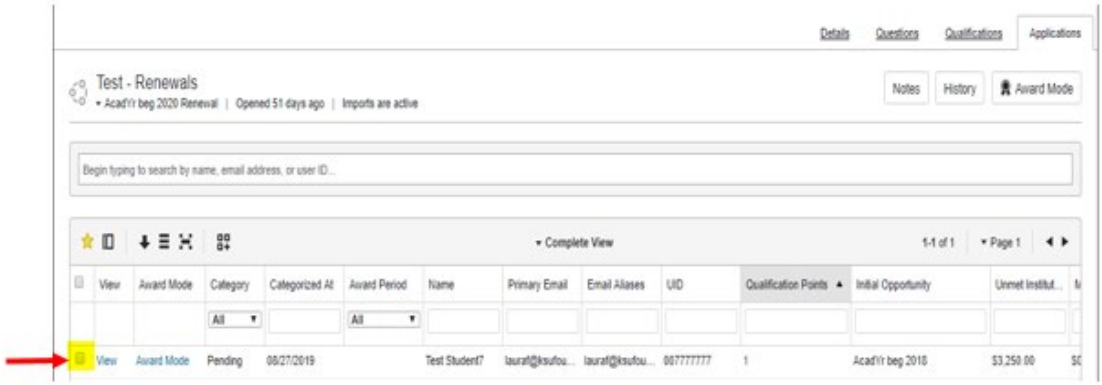
Submitted – All required renewal questions has been completed by the applicant and are awaiting review by an administrator
Note: This category WILL NOT be available if you are only using imported data to qualify for renewals. A submitted category requires action from the administrator. After reviewing the applicant's renewal application, administrators may:

- Change the status to **Awarded** if all qualifications have been met, or
- **Deferred – defers** the disbursement until the next renewal period (allowing the applicant to automatically be considered for a renewal award during the next renewal period while keeping the same number of remaining renewal disbursements), or
  Example: If you know that an applicant is leaving or transferring out, you typically wouldn't want the applicant to receive the award, it's recommended to take them out of the "Pending" status to "Deferred". Leaving them in the "Deferred" status is not recommended by BBAM.
- **Final Disbursement - disburses** the current renewal award and cancel any remaining future disbursements, or
- **Cancelled - cancels** the applicant's current renewal disbursement and all future disbursements.
  For example, selecting "cancel" means the applicant will not receive the award in the current year and it also cancels the remaining iterations for the applicant.

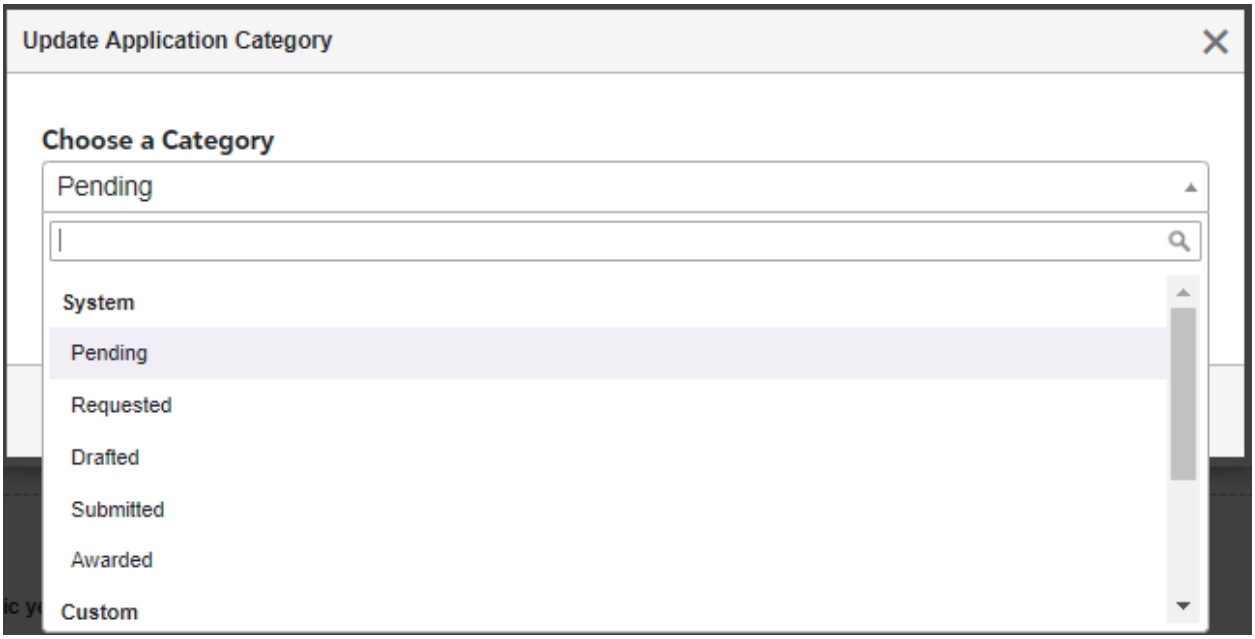
Note: Categories which defer, disburse-then-cancel, and cancel are not default options in the BBAM system. If the University decides to use this, then they may be added to the Applications Categories under Renewal Management & Post-Acceptance.

Awarded – An administrator has determined that the award can be made, and the monetary funds can be disbursed
Note: the funds will not be disbursed until you have submitted your encumbrance report to KSIS for processing.

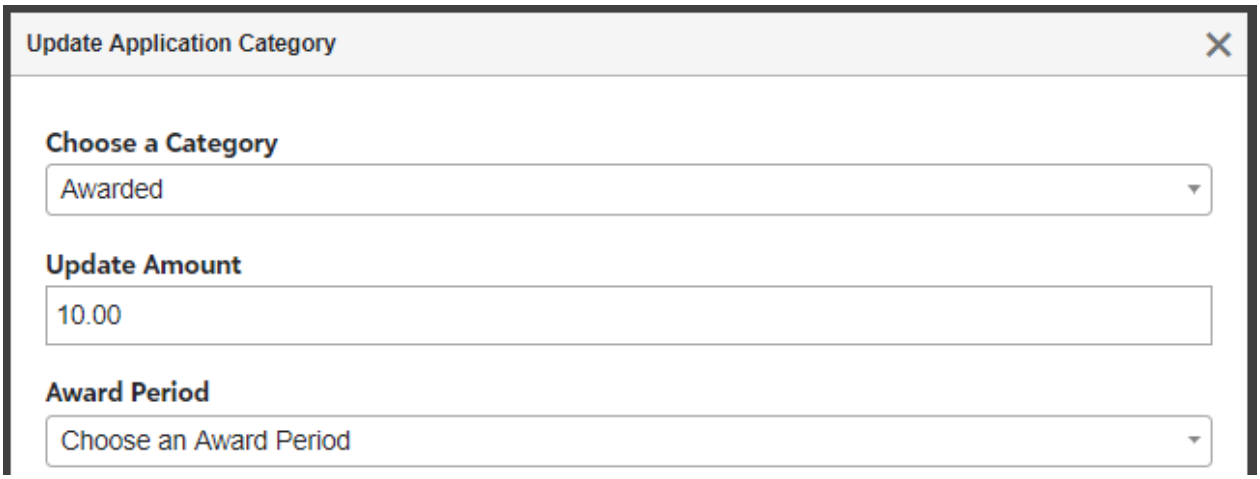
Categories can be switched by checking the box next to the application that are you wanting to change.



A new window will open. Choose the appropriate category from the drop-down menu.

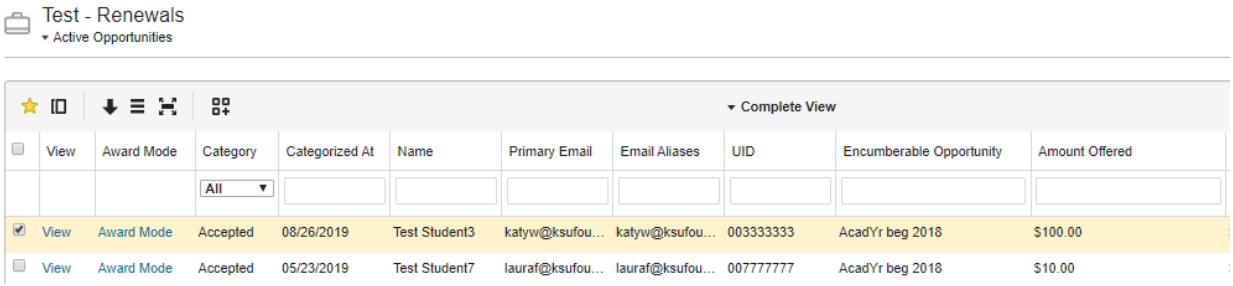


If the category encumbers funds, the system will next present you with the ability to designate an amount per applicant you would like to award and a drop-down menu with available custom award periods.

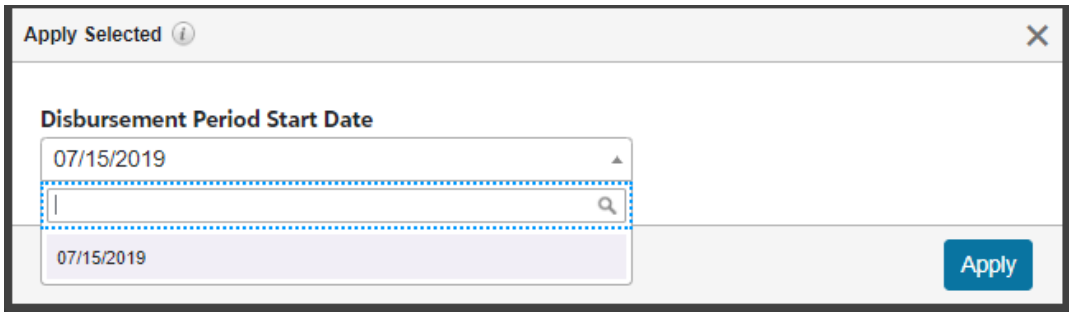


How to force apply renewal applicants into renewal opportunities? System administrators only

- Click on Opportunity > portfolios > all > locate the desired renewable portfolio > click portfolio details.
- Select the encumbered application tab (this contains a list of all individuals who have received the award in this portfolio). Mark the box of the encumbered application of the desired applicant.



- Click act on selected > apply > select the "disbursement period start date" of the appropriate renewal opportunity ex: 7/15 (this is the period added on the details tab) > click apply



To view the new renewal application for the chosen applicant you have just force applied – System administrators only

- Hover over "active opportunities" below the name of the portfolio and select the renewal opportunity.
- Select the "application tab" > then the renewal disbursement application for the chosen applicant should be listed in the grid > you may now process the renewal application as desired.

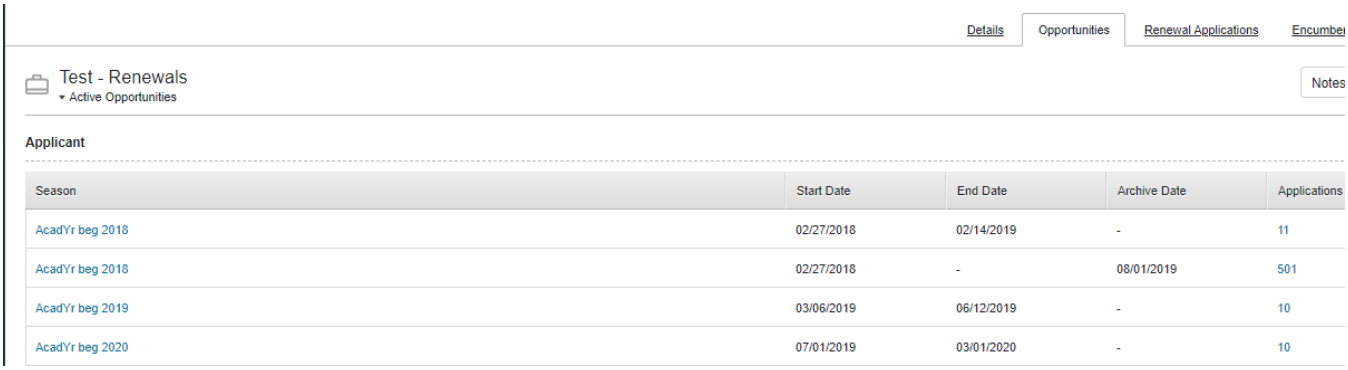
How to access archived renewal opportunities and renewal applications?

Just like initial opportunities and applications, renewal opportunities and renewal applications are affected by cycle management. At some point, they must also be "frozen" or archived and moved into your historical records in order to maintain an accurate picture of what occurred during the last cycle.

A-Accessing archived renewal applications and renewal opportunities within a portfolio

Select Opportunity > Portfolios > All > locate the desire portfolio > Click Portfolio details

- Renewal Opportunities: By selecting the "Opportunities" tab within the portfolio, Scholarship Administrators may view all current and archived initial opportunities as well as current and archived renewal opportunities.



Season	Start Date	End Date	Archive Date	Applications
AcadYr beg 2018	02/27/2018	02/14/2019	-	11
AcadYr beg 2018	02/27/2018	-	08/01/2019	501
AcadYr beg 2019	03/06/2019	06/12/2019	-	10
AcadYr beg 2020	07/01/2019	03/01/2020	-	10

- Renewal Applications: By selecting the Renewal Applications tab within the portfolio, administrators may view all archived renewal applications from all of the portfolio's previous renewal opportunities in one central location.

B-Accessing Archived Renewal Applications for the system

Select Opportunity > Portfolios > Renewal Applications