Awarding Scholarships in OSU ScholarDollars
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Awarding scholarships is a critical component of implementing a new scholarship management system.

Whether you have used the previous version of ScholarDollars or this is your first cycle with ScholarDollars - this is going to be new to everyone.

We are in this together!

Our shared goal is to serve our student population, our faculty/staff users, and our donors to the very best of our abilities.

The Scholarship Office looks forward to partnering with all our campus colleagues to support the OSU community during the new scholarship management system’s inaugural year.
Today’s Training Topics

1. Awarding In ScholarDollars
2. Types of Awards
3. Direct Awarding Flow
4. Internal Application Awarding Flow
5. Approving Awards
6. Notifying Scholarship Recipients
7. Monitoring Post-Awarding Actions
Awarding Scholarships in OSU ScholarDollars

- This training will provide a functional review of how to award scholarships within the OSU ScholarDollars system
  - Scholarship awarding processes are linked to the Foundation Reimbursement System (GRS/GRRS/SRS).
- It is important to choose the appropriate awarding roles to make sure our funds and students are best served
  - Initiator (ScholarDollars) / Originator (GRS)
  - Approver (ScholarDollars) / Signer (GRS)
- Anyone who is involved as either an initiator/originator of an award and/or an approver/signer for awards must request the appropriate access from the OSU Scholarship Office (scholardollars@oregonstate.edu)
- Once scholarships are awarded and approved in ScholarDollars that information is passed to GRS automatically to create a payment sheet
Types of Scholarships

1. **Direct Award Scholarships:** Direct award scholarships do not require an application from the student. Direct Awarding uses the matching engine to qualify students based on their student data in Banner, and then an administrator selects and awards students from among the eligible students.

2. **Internal Application Scholarships:** Internal application scholarships use the matching engine to qualify students based on their student data in Banner and an application submitted by the student. Those applications are reviewed and scored by a committee or individual reviewer after the application deadline. The awarding process consists of a final ranking of candidates and awarding of the selected students.

3. **Internal Application w/ Continuous Awarding Scholarships:** Internal Application with Continuous Awarding Scholarships allow student applications to be continuously submitted, reviewed, and awarded throughout the application cycle, before or after the application deadline.
Awarding Direct Award Scholarships

- Direct Award Scholarship Awarding Flow

1. Scholarship’s Application Method “No Application - Direct Award” is selected
2. Application is available for eligible students to apply while cycle is open
3. Review committees are created and assigned to the application to review
4. Reviewers score candidates and generate score cards
5. Candidates meeting the matching requirements are ready to begin awarding
6. Scholarship Status: Awarding
Awarding Direct Award Scholarships

- Plan Icon > Scholarships Tile > Award Tab
Awarding Direct Award Scholarships

- Edit Button (pencil icon) > Candidates Tab
Awarding Direct Award Scholarships

- From the Candidates tab, filter and sort your applicant pool to reveal your top candidates

**IMPORTANT:**
It is good practice to always “Re-run Auto Match” before filtering/sorting your candidates. This will provide the most up-to-date list of eligible students.

Student data is imported daily; therefore, re-running the auto match will refresh the data to ensure students still match the criteria from their student record in Banner.
Awarding Direct Award Scholarships

- Methods for Filtering and Sorting Your Applicant Pool
  - Column Manager
    - Allows the administrator to add additional columns containing student data from Banner (SIS) and/or responses from the student’s application(s)
  - SmartRank
    - A customized pre-set group of columns that can be applied to applicant pools on a fund-by-fund basis
    - A SmartRank saves BOTH your columns and the weight percentage you have assigned to each
Awarding Direct Award Scholarships

- Filtering and Sorting Your Applicant Pool
  - **Column Manager**: Use the icon on the top left of your candidates list that looks like 2 columns side by side (   )
Awarding Direct Award Scholarships

- Filtering and Sorting Your Applicant Pool
  - **Column Manager**: A pop up will appear with 2 tabs: SIS (Banner student data) & Question (student application questions)
    - Columns added through Column Manager remain on the pool until deleted - even if you navigate away from this page

For this example I have added in the following columns:
- Overall GPA
- Current Class Standing
- Financial Need Level
Awarding Direct Award Scholarships

- Filtering and Sorting Your Applicant Pool
  - **SmartRank**: this creates a weighted numeric score and an ordinal ranking for each candidate that can be used to sort or filter the group
Awarding Direct Award Scholarships

- Filtering and Sorting Your Applicant Pool
- SmartRank
  - To add a new SmartRank, click on the + button next to the SmartRank dropdown (Select a SmartRank... +)
Awarding Direct Award Scholarships

- Filtering and Sorting Your Applicant Pool:
  - SmartRank
    - Name
    - Organization
    - Department (if necessary)
    - Requirements
      - Use the Add button for new requirements and a new weight percentage
      - Use the Edit pencil to adjust the weight percentage for any requirement
    - Comments
Awarding Direct Award Scholarships

- Filtering and Sorting Your Applicant Pool
  - **SmartRank**: Add SmartRank requirements by selecting an SIS and/or application question data point and assigning it a weight percentage in the pop up window
Awarding Direct Award Scholarships

- Once students have been reviewed, you are ready to load the awards.
  - To select students for awarding, click the $ icon at the far right to move them to the Awards tab.

A pop up will ask you to confirm that you wish to place the student into the Awards tab with a $0 allocation.
Awarding Direct Award Scholarships

- To award a student, navigate to the Awards Tab
- Click on the underlined Award Amount
  - An awarding pop up will ask you to customize the amount and terms the student will receive the scholarship
Awarding Direct Award Scholarships

- The Projected Amount and Remaining Budget tiles will update dynamically as you load awards
Awarding Internal Application Scholarships

- Internal Application Scholarship Awarding Flow

1. Scholarship's Application Method "Internal Application" is selected
2. Application is available for eligible students to apply while cycle is open
3. Review committees are created and assigned to the application to review
4. Reviewers score candidates using recommendation or score cards
5. Candidates from the final round of review are brought in to begin awarding

- Scholarship Status:
  - Draft
  - Open
  - Ready to Review
  - Reviewing
  - Awarding
Awarding Internal Application Scholarships

- Award Icon > Award Views Tile > Active Tab
- Click Add to fill in the required and optional fields
Awarding Internal Application Scholarships

- Name
- Pool: Only completed pools (the review process is completely finished) will appear on the dropdown list
Awarding Internal Application Scholarships

- When you select a pool from the dropdown menu, you will be presented with a scholarship selection list.
  - You may choose some or all of the listed scholarships for your Award View (You must choose at least one scholarship to fulfill this required field).
  - Click OK.
Awarding Internal Application Scholarships

- Choosing the desired pool and scholarships will create a list of all students who were reviewed and scored by the scholarship review committee.
  - These are the students who could receive a scholarship award.
- You are now ready to filter and sort the list of reviewed students to identify award recipients.
Awarding Internal Application Scholarships

- Filtering and Sorting Your Applicant Pool:
  - **SmartRank**: Add a SmartRank if desired
    - You can either create a new SmartRank or use an existing one from the dropdown menu
    - Click Save
Awarding Internal Application Scholarships

- Filtering and Sorting Your Applicant Pool:
  - **Column Manager**: Add custom columns using the Column Manager
    - A student’s Banner data and/or a student’s answers to application questions can be added with this function
  - Click Save
Awarding Internal Application Scholarships

- Once students have been reviewed, you are ready to load the awards
  - Click on the underlined dollar figure on the right for the student you wish to award.
Awarding Internal Application Scholarships

- Awarding pop up
  - The pop up screen will list all of the scholarships the student is eligible to be awarded within your Award View
  - Click on the appropriate scholarship(s) to open the accordion which contains the fillable award terms
  - Fill in the appropriate award terms with the correct award amounts and, if necessary, add comments
  - Click Save
Awarding Internal Application Scholarships

**Important:**
Each scholarship header will contain the Total Awarded and the Remaining Budget. Both of these amounts will update as you award students.
Awarding Internal Application w/ Continuous Awarding Scholarship

- Internal Application w/ Continuous Awarding Scholarship Flow
  - This awarding flow is not used by many scholarships at OSU, so written awarding instructions will be posted to the OSU Scholarship Office website to guide scholarship administrators who manage scholarships with this type of application process.
Approving Awards

- Awards loaded in ScholarDollars will be approved in the ScholarDollars system, rather than in GRS.

  - In order to approve scholarship awards, approvers/signers must have the proper access. Please contact the OSU Scholarship Office to request access as needed.

- Award > Manage Awards or Click on the Awards to Approve tile on your dashboard to view the Approval landing page.
Approving Awards

Approve Tab

- APPROVE
  - From this screen, select all or some awards to Approve (this action is the same as being the signer on a payment sheet in GRS)
    - To approve awards, select the student(s) to be approved and click the Approve button
    - The approved awards then move to the Completed tab
Approving Awards

Approve Tab

- DENY
  - From this screen, you can also disapprove/deny awards if needed
  - To deny an award and/or the award’s term distribution for any reason, select the award(s) to be denied and click the Deny button
  - The denied awards then move to the Cancelled tab
Approving Awards

- Email Notification will go to the Approver/Signer to notify them that they have something in the system to take action on
  - This will be sent 1x per day so as not to overwhelm our approvers/signers

From: Oregon State University Scholarship Office <scholardollars@oregonstate.edu>
Sent: Thursday, March 11, 2021 7:10 AM
To: Conniff, Colleen
Subject: Action Requested for OSU ScholarDollars Awards

Dear Colleen,

One or more scholarships administered by your unit(s) are awaiting action in OSU ScholarDollars. Please log into https://oregonstate.scholarshipuniverse.com/ to learn more and complete the outstanding tasks.

- Scholarships to Award: 307

Thank you,
Oregon State University Scholarship Office
Notifying Scholarship Recipients

- Award Icon > Manage Awards Tile > Notify Awards Tab
Notifying Scholarship Recipients

- Select each student to be notified and click the Notify button.
- Notified students will then move to the Completed tab or the Pending Student Action tab, depending on whether a thank you letter is required.

**Note:**
It is best practice to use the dropdown to select the maximum items per page when notifying in bulk. The system will only check the boxes on the first page.
Notifying Scholarship Recipients

- Provide an Acceptance Deadline Date if the scholarship is set up to require acceptance
- Provide a Thank You Deadline Date if the scholarship is set up to require a thank you letter
- The Acceptance and/or Thank You Deadline Date(s) will be displayed to students as the dates by which they need to accept and/or provide their thank you letter for the scholarship within ScholarDollars

Notification of Awards

Please confirm that you want to send notification of awards to the selected students. This deadline will be applied to selected scholarships that require an acceptance or thank you note.

- Acceptance Deadline Date: 6/30/2021
- Thank You Deadline Date: 6/30/2021

[Options: Cancel, Confirm]
Notifying Scholarship Recipients

- Clicking on the Remove button will cancel the student’s award, and they will not receive the scholarship.
  - If you choose to cancel the student’s scholarship, they will be moved to the Cancelled tab.
To monitor the student action after they have been awarded, navigate to the Pending Student Action tab. As students complete their acceptance and thank you letters, you will begin to see green checkmarks in the appropriate columns to indicate which step(s) they have completed.
If you wish to waive a particular requirement, select the student(s) for whom you wish to waive the requirement(s).

Then, choose which action to waive from the Select a Waive Action dropdown menu.
Resources for Faculty and Staff

- **Online Scholarship Support**
  - Available from the Scholarship Office’s website at [https://scholarships.oregonstate.edu/](https://scholarships.oregonstate.edu/) to anyone with ONID access
  - The slides and a recording from this training will be posted to the Faculty & Staff section of the Scholarship Office’s website within the next week

- **OSU Scholarship Office**
  - Contact us by email at scholardollars@oregonstate.edu with any questions related to OSU ScholarDollars or scholarship management
Resources for Faculty and Staff

- OSU ScholarDollars
  - FreshDesk awarding process video series:
    1. Direct Award Scholarships:
    2. Internal Application Scholarships:
    3. Internal Application with Continuous Awarding Scholarships:
Questions?
THANK YOU