OSU ScholarDollars: Managing Review Processes
Types of ScholarDollars Scholarships

1. Direct Scholarships: These scholarships are automatic consideration types of scholarships
   • Direct Scholarships do not require a Review Committee to evaluate student applications; they skip the Review Process and go straight to the Awarding Process

2. Internal Application Scholarships: These scholarships require application responses and/or materials from the students
   • Internal Application Scholarships require a Review Committee to evaluate student applications in order to move onto the Awarding Process

○ This training covers the review process for Internal Application Scholarships only
Review Process User Roles in ScholarDollars

- **Review Managers**
  - This role creates and manages committees, adding committee members, score cards, and applicant review pools
  - Today’s training is focused on Review Managers and how they facilitate these processes

- **Reviewers**
  - This role is assigned to committee members so they can review and score applications
  - Written materials will be posted to the online Scholarship Toolkit to assist reviewers with evaluating and scoring applications in ScholarDollars
What is the ScholarDollars Review Process Workflow?

1. Create a Committee & Assign Reviewers
2. Create a Score Card
3. Create a Review Pool
4. Review & Score Applications
5. Monitor Progress & Finalize Review
Step 1: Create a Committee & Assign Reviewers

1. Review Icon > Manage Committees Tile > Click the “Add” button
Step 1: Create a Committee & Assign Reviewers

2. Fill in the appropriate fields:
   a) **Name**: A unique name that distinguishes this committee from others in the system
   b) **Description**: A brief description of this committee’s role and responsibilities
   c) **Organization**: (Optional) Limits visibility of committee information to users with access to the specified organization (typically a college) within the system
   d) **Department** (Optional): Limits visibility to users with access to the specified department within the designated organization
   e) **Members**: OSU faculty and staff that are serving on the committee as reviewers

**IMPORTANT:**
- User accounts must be created in ScholarDollars by the Scholarship Office for authorized faculty and staff before they can be assigned to committees as reviewers
- Please do *not* sign into ScholarDollars before an account has been set up for you
Step 1: Create a Committee & Assign Reviewers

IMPORTANT:
Tools are available to batch import review committees and committee members in larger groups. To learn more about this capability, please contact the Scholarship Office.

Review committee members may be deactivated, but not deleted. If you need to reactivate them later, they will appear in the members dropdown.

**Please note this does not remove them from the system. It ONLY deactivates them from the specific review committee.**
Step 2: Create a Score Card

1. Plan > Score Cards > Click the ‘Add’ button
Step 2: Create a Score Card

2. Fill in the appropriate fields:
   a) **Name**: Unique identifier for this score card
   b) **Organization (Optional)**: Limits who can see this score card to a specific organization/college
   c) **Department (Optional)**: Limits visibility of score card to the specified department within the designated organization
   d) **Description**: A brief description of how the score card will be used
   e) **Active Toggle**: Defaults to Active
   f) **Criteria**: Criteria to be used by reviewers when scoring the student applications and the relative weight assigned to each
Step 2: Create a Score Card

f) Criteria (continued)

- **Criterion Name**: Evaluation Category
- **Max Value**: Number ranking (decimals allowed)
- **Weight Percentage**: The weight you wish to assign to that particular category (total of all categories must be 100%)
- **Help Text**: Anything you wish reviewers to know while scoring that category

**NOTE**: Be sure to SAVE your work by clicking “Submit” & “Save”
Step 3: Create a Review Pool

- Review Icon > Manage Pools > Click ‘Add’ Button

**IMPORTANT:**
Review pools cannot be created until AFTER the student application deadline for the scholarship has passed.
Step 3: Create a Review Pool

2. Fill in the appropriate fields:
   1. **Pool Name**: Unique identifier for this review pool
   2. **Pool Application**: The scholarship application you will be using to evaluate students for specific scholarships
      - **Manage Scholarships**: A list of the individual scholarship funds associated with the designated application
Step 3: Create a Review Pool

- **Manage Scholarships (continued):** Choose which scholarships will be reviewed as part of this review pool. The number of scholarships selected and the total number of applicants for the group of selected scholarships will be displayed.
Step 3: Create a Review Pool

3. **Review Deadline**: The deadline by which all reviews should be finished.

4. **Review Type**: Indicate whether an individual or a committee will complete the reviews.
   a) **Committee**: If choosing to review by committee, select your review committee here.
   b) **Individual**: If choosing to have an individual person review, select the appropriate person from the dropdown.

5. **Scoring Method**: Indicate how the reviewer(s) will evaluate student applications.
   a) **Score Card**: Select a score card with the desired evaluation criteria.
   b) **Recommendation**: Applicants are evaluated based on a Likert scale-type process.
Step 3: Create a Review Pool

6. **Allocation Method:** Select how the applications will be divided among the reviewers
   a) **Divide Committee**
   b) **Every Reviewer Reviews Every Applicant**
   c) **Reviews per Application:** Includes an additional field to indicate the number of reviews required per application

7. **Profile Visibility:** Additional student data fields which will be displayed to reviewers

8. **Display Average Committee Score (Optional):** Average reviewer scores are displayed to other reviewers

9. **Reviewer Instructions:** Instructions for reviewers that are included in the notification emails sent by the system when the review process begins
Step 3: Create a Review Pool

Starting the Review Process for Committee Members:

1. **SAVE**: Saves your review pool in a “draft” form

2. **START REVIEW**: Triggers an automated email to reviewers inviting them to begin evaluating applicants

**NOTE:**
You can manage multiple rounds of review in ScholarDollars if necessary. If your area requires multiple rounds of review, please contact the Scholarship Office for more information.
Step 4: Review & Score Applications

- Review > Review Applications > View (binoculars icon)
  - Clicking the link in the email reviewers receive will take them here as well
Step 4: Review & Score Applications

- Click on the gavel icon to begin reviewing a student
  - Reviewers can track their progress on this landing page
Step 4: Review & Score Applications

- Reviewers will be presented with multiple tabs to access the materials that may be used for evaluation
  - **Application**: This tab displays the responses and materials submitted in the student’s application
  - **Matching**: This tab displays the minimum requirements the student met to be eligible for consideration
  - **Other Student Fields**: Information displayed in these fields has been imported directly from the student’s Banner record
Step 4: Review & Score Applications

### NOTE:

There is no SAVE button - the system automatically saves your scores as you go.

After you enter your scores, move on to the next application or navigate back to the Review Pool.
Step 4: Review & Score Applications

- If a reviewer wishes to look at an application they have already reviewed, they may use the dropdown to filter by the status “Reviewed"
Step 5: Monitor Progress & Finalize Review

- Review Icon > Manage Pools > Reviewing Tab
Step 5: Monitor Progress & Finalize Review

- To check a Review Committee’s progress, click on the percentage displayed under “Progress”
Step 5: Monitor Progress & Finalize Review

1. **Reviews Tab**: A reviewer can be removed from the process via this tab
   - If you remove a reviewer, a pop-up message will ask you to verify the removal
   - You will have the option to send the reviewer a notification that they have been removed
Step 5: Monitor Progress & Finalize Review

2. **Students Tab**: You may view the average reviewer score per student via this tab.
   - Click on the Average Score percentage and a pop up will be presented with each reviewer’s score.
Step 5: Monitor Progress & Finalize Review

- Finalizing a Review
  
  **Reminder:** If your area needs multiple rounds of review, please contact the Scholarship Office so we can help you navigate that process.
Step 5: Monitor Progress & Finalize Review

- To finalize the Review Process, click “Complete Review”
- The option buttons will then change, click “Start Awarding”
- This completes the review process and the completed review will be displayed in the “Complete” Tab
Resources for Faculty and Staff

- Online Scholarship Toolkit
  - Available from the Scholarship Office’s website at https://scholarships.oregonstate.edu/ to anyone with ONID access
  - The slides and a recording from this training will be posted to the Scholarship Toolkit 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

- OSU ScholarDollars
  - FreshDesk review process video series: https://campuslogicinc.freshdesk.com/support/solutions/articles/5000861205-review-process-video-series
Upcoming ScholarDollars Training Sessions

○ Awarding Scholarships Training
  ○ Wednesday, February 17, 2021 from 3 pm to 4 pm and Thursday, February 18, 2021 from 10 am to 11 am
  ○ Most useful for: Scholarship Administrators and Review Committee Managers/Chairs
Questions?
THANK YOU