



JagSPOT Review Chair User Guide

This guide will assist you with all parts of the scholarship review and awarding processes in JagSPOT powered by Scholarship Universe.

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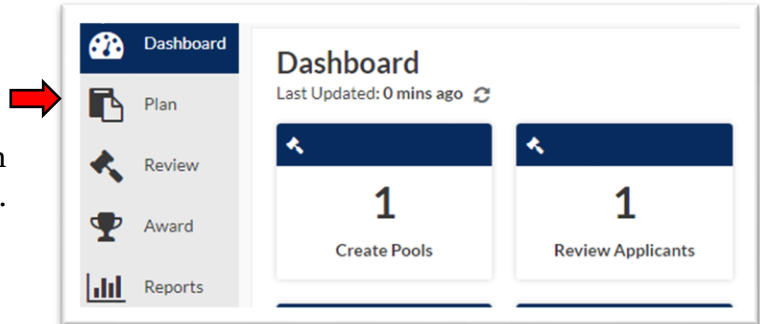
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JagSPOT Navigating A Scholarship's Settings

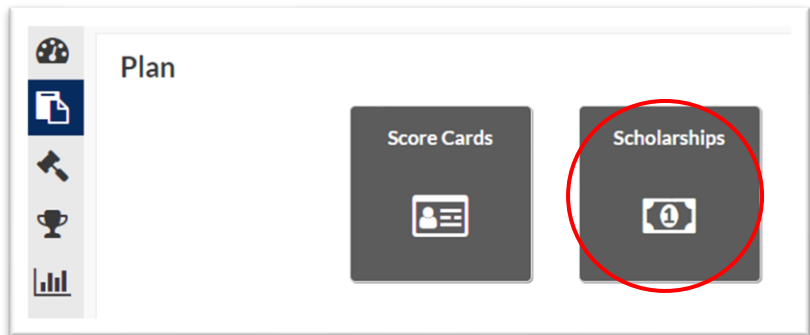
This guide will assist with locating and understanding the features of scholarships within JagSPOT.

1. To locate a scholarship under your pervue in JagSPOT, start by clicking on *Plan* in the left hand navigation portal.

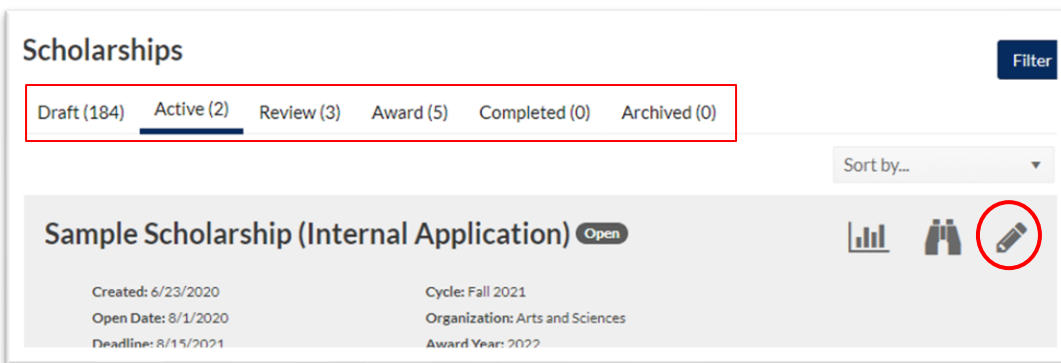


2. Once you have arrived on the *Plan* page, select the *Scholarships* tile.

If you will be using rubrics while reviewing applications in JagSPOT, you can review and edit them by selecting the *Scorecards* tile.



3. The scholarship planning portal will now be visible. On this screen all of the scholarships you oversee will appear in the tab corresponding to their current status.



Draft: Award is not visible to students, can still be edited.
Active: Award is open and available for students to apply to.
Review: Award application period has ended and is ready for review and awarding.
Award: Award is ready for awarding.
Completed: Award has been awarded for this award year.
Archived: Award listings from previous award years.

4. Once the correct scholarship has been identified, click on the *Pencil* icon to access it.
5. On the scholarship detail view there are various fields to consider.

Scholarship Page Fields:

General: Details of current scholarship settings.

Matching: Criteria students need to meet to be able to view the scholarship.

Candidates: List of students who have applied or who meet matching criteria if no application.

Awards: List of students who have been awarded this aid year.

General details: Scholarship name and basic organizational details.

Application Method: Direct Award (previously auto-match or faculty nominated), Internal Application (previously conditional applications), Internal Application Continuous Awarding (conditional application that can be awarded on a rolling basis).

Total Amount: 999 will appear as a placeholder until endowment reports come out in January.

Amount Displayed: Displayed to the student when they view the scholarship

Description: Description of award that is visible to students when they view the scholarship.

Sample Scholarship (Internal Application) : Open

General Matching Candidates Awards

Scholarship Information

* Name: Sample Scholarship (Internal Application)

* Organization: Arts and Sciences

Department: Select an item...

** Cycle: Fall 2021 Open Date: 8/1/2020 Deadline: 8/15/2021

** Application Method: Internal Application

** Application: Mitchell College of Business Conditional Scholarship Application

Donor: Financial Aid Office x

** Award Year: 2022

** Terms: 202210 x

Max Applicants:

Acceptance Required: YES NO

Thank You Required: YES NO

Approval Required: YES NO

Award Approval Required: YES NO

* Thank You Template: Generic Department non renewable signed Dept Head

Display Contact Info: Select an item...

Fund Code: SRA01

Alternate Codes:

** Total Amount: 99

Shared Amount: YES NO

** Max number of Awards: 99

** Amount Displayed: Varies

Renewable to Student: YES NO

Notify of Award Loss: YES NO

Public Scholarship: YES NO

** Description: This scholarship was created to assist a student with their tuition charges. You must have a 3.0 institutional GPA to apply.

Cycle Dates: Dates when scholarships open and close for students to apply.

Award Year and Terms: Award year and terms will be preset.

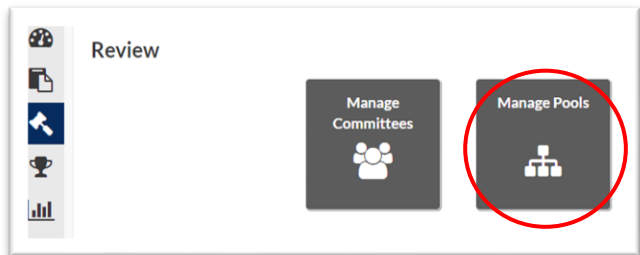


JagSPOT Creating and Managing Review Pools: For Those Who Want to Get Fancy

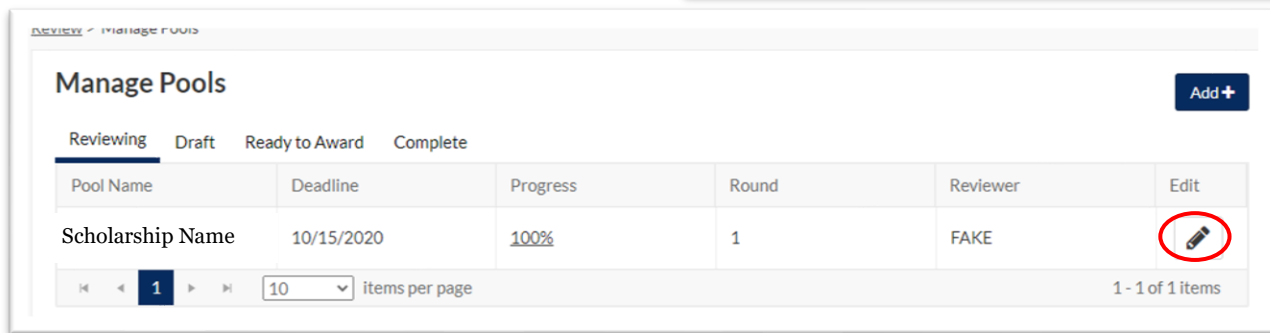
This guide will assist you with creating and managing reviewer pools to be used during the review process. The Office of Scholarship Services will regularly create and manage these review pools. Below are instructions for customizing these review pools.

1. Navigate to the *Review* section on the left-hand navigation bar and then click on the *Manage Pools* tile.

This will bring up the *Manage Pools Portal*.



2. Select the review pool by clicking on the corresponding pencil icon.



3. So long as the review process has not started for this pool fields in the Round 1 section will be editable.

Review Deadline: Either key in the date or use the calendar icon to select the date for the review period to close.

Review Type: Select either a committee or individual review. Another box will appear asking you to select the specific committee or individual.

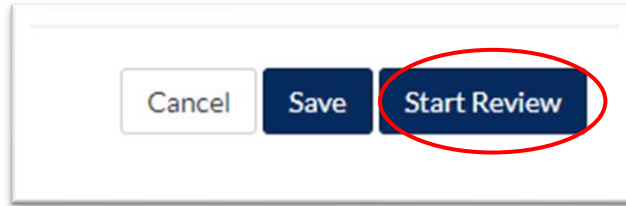
Scoring Method: Pools can use either a 5-point recommendation scale or a *Scorecard* if you would like to use a *Scorecard*, contact Scholarship Services for assistance in customizing one.

Allocation Method: The applicants can be distributed among members of the committee in three different ways.

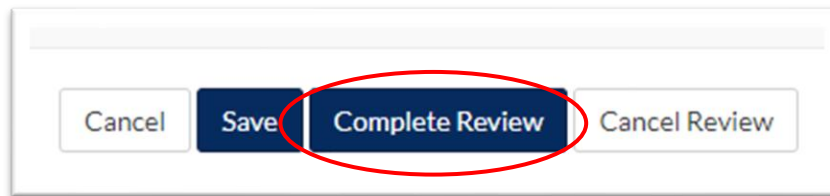
Display Average Committee Score: If enabled, committee members see the average score other reviewers have assigned this applicant while reviewing the application.

Reviewer Instructions: Additional comments for your Committee members to see when they review applications.

4. Once the pool settings are completed, you can select the *Start Review* button. This will notify the committee that the applications are ready for review.



5. After the first round of review has been completed, you can proceed to awarding or start another round of reviewing by selecting New Round and completing steps 3-5 in this guide.

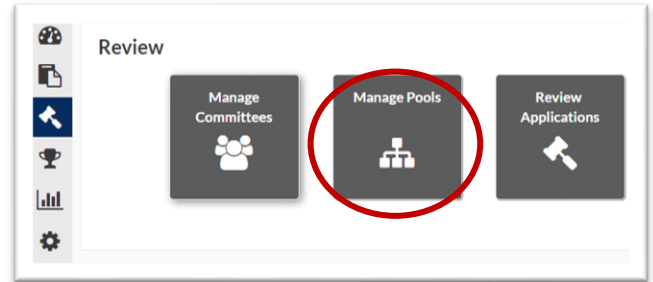




JagSPOT Reviewing and Rubrics for Internal Applications

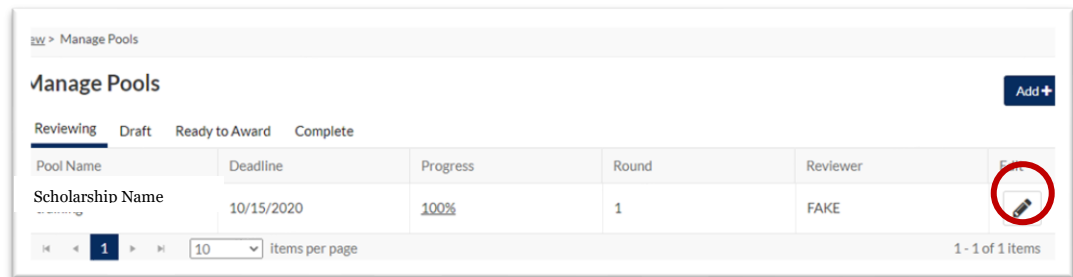
Committees will all be managed and populated by the Office of Scholarship Services. If you need to make changes to the composition of your committee, please contact scholarships@southalabama.edu. Before the review process begins, the Office of Scholarship Services will be in communication with the Committee Chair to confirm the details of the desired review process.

1. Once a scholarship submission deadline passes, the Office of Scholarship Services will initiate the review process. Committee Chairs can also start this process if they prefer. This is done by clicking on the *Review* section on the left-hand navigation bar and then selecting *Manage Pools*.

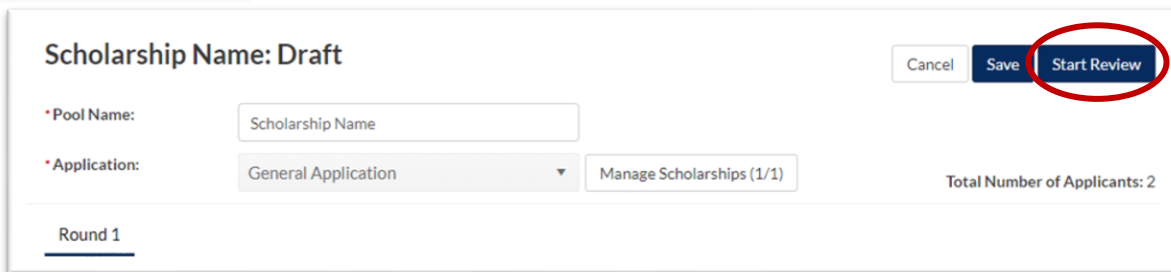


2. A list of available *Pools* in various stages of the awarding process will be visible. All *Pools* that are beginning or still in the process of reviewing should be listed under the *Reviewing* tab. To access a pool, press the *Pencil* icon.

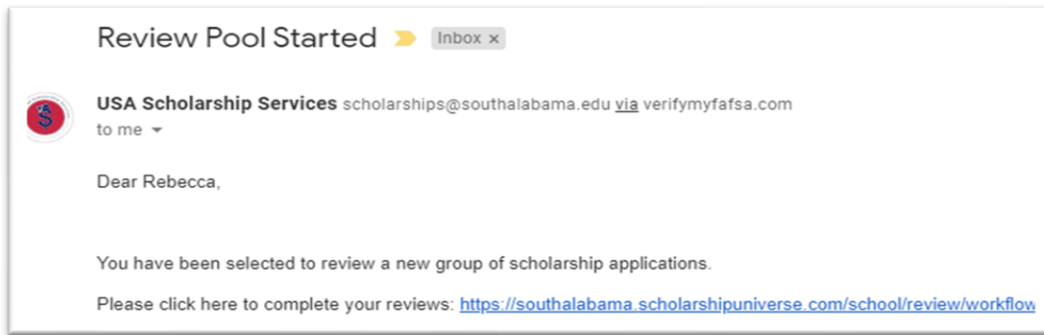
This will allow you to view the settings of the pool. Settings will be populated to reflect the desired review process of the committee chair. *Please do not adjust them without consulting the Scholarship Office.*



3. Once the review is ready to begin select the *Start Review* button.

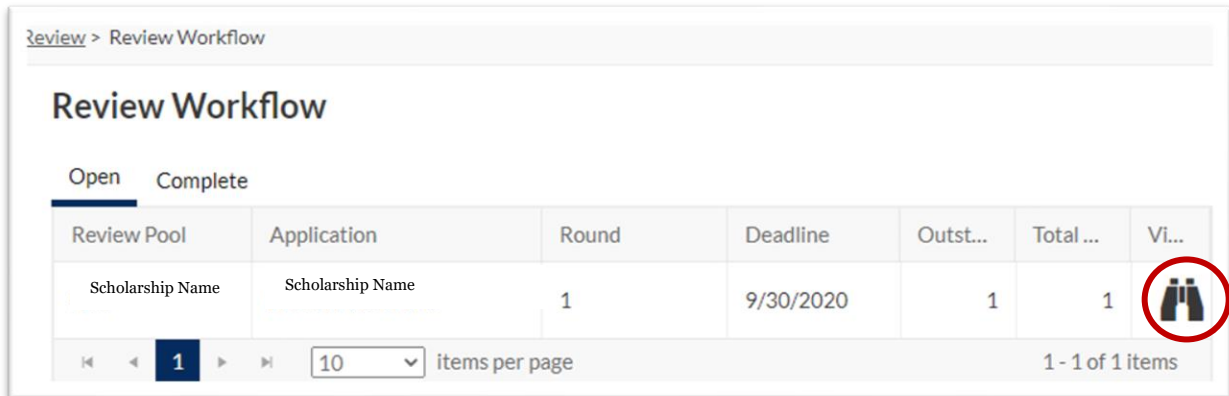


4. This will trigger an email notification to all committee members notifying them that the review session is now open. The email to their JagMail account will have a link directly to their review workflow.

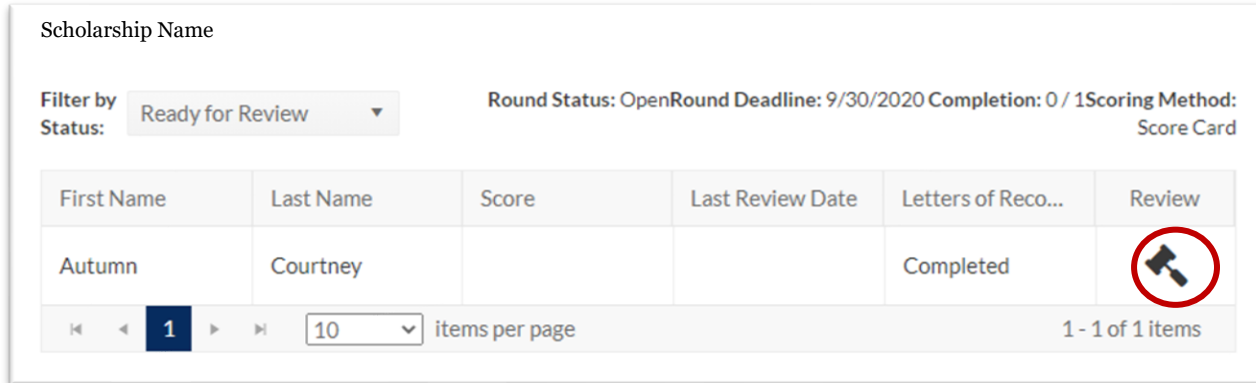


5. Once in the *Review Workflow* the pools you have been designated to review will appear.

6. To begin reviewing you will click the *Binoculars* which will display the list of applicants.

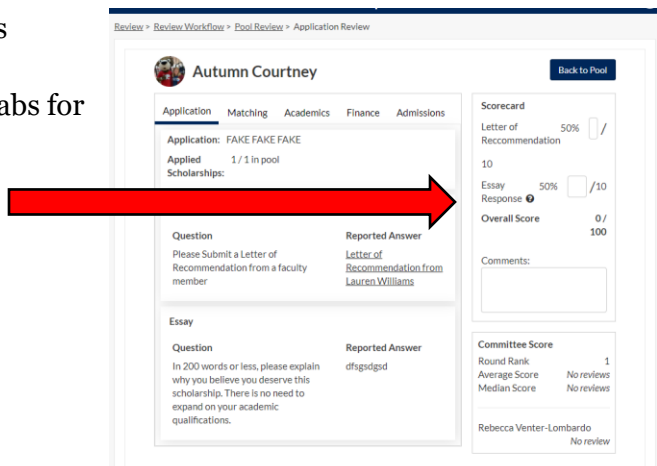


7. To view an applicant's materials, you will click on the *Gavel* icon.

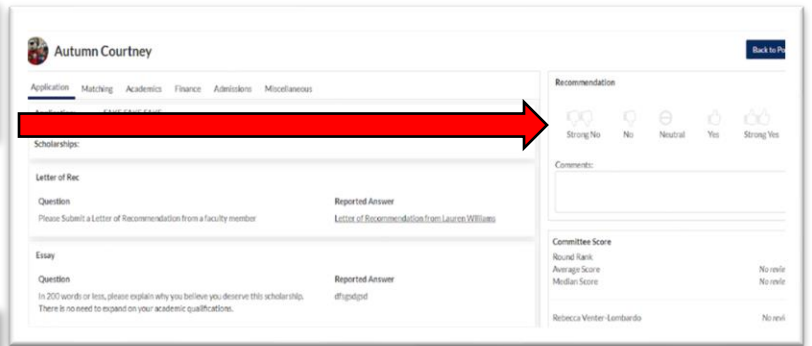


8. A pop-up window will appear with the applicant's materials. You can toggle between *Application*, *Matching*, *Academic*, *Finance*, and *Admissions* tabs for additional information.

If your committee is using a *Scorecard* (customizable rubric) you will find it on the pop-up window. You can enter scores and comments for the application in this section.



If you are not using a scorecard, you will see ranking options from *Strong No* to *Strong Yes*.



- Letters of Recommendation and additional materials are available on the application tab.

Click on the *Letter of Recommendation* to display the letter in a pop-up window.

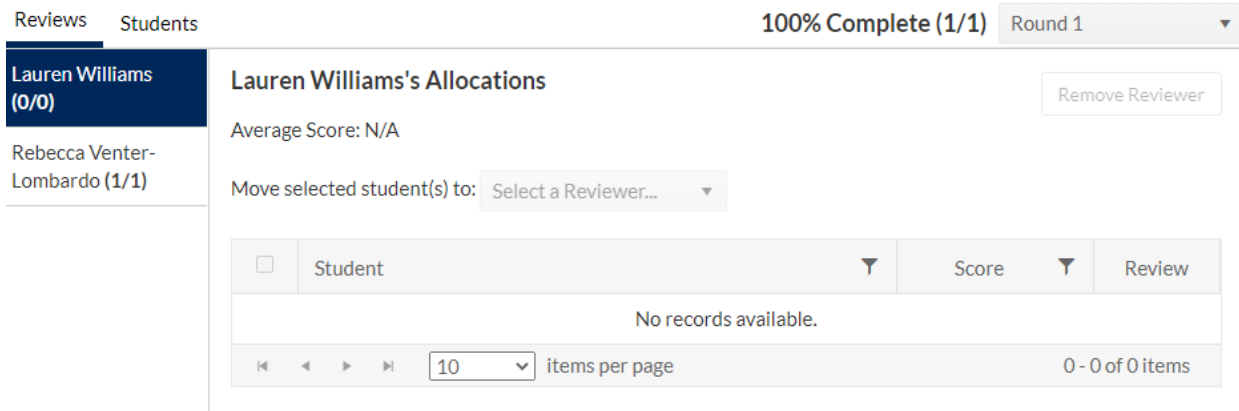
Letter of Recommendation from Lauren Williams

Autumn is cool.

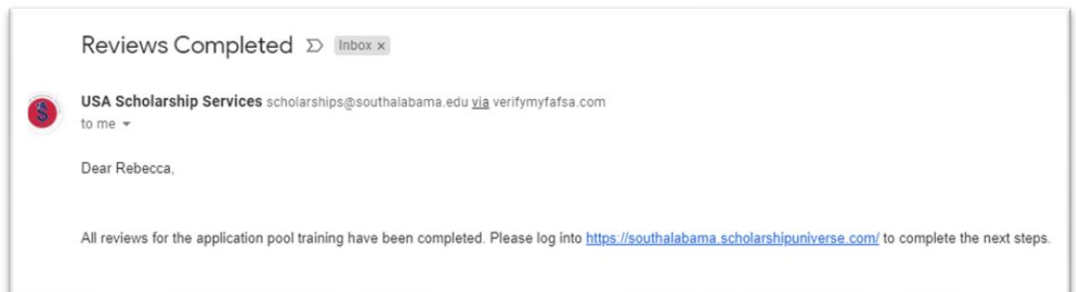
- Once you have reviewed the application you can enter your scores and comments before saving your review. This will move the student to the completed review section of your workflow.

- To monitor the progress of all reviewers, navigate back to the *Manage Pools* page and select your pool from the list by clicking on the *Pencil* icon.

- Once the specific *Pool Detail* page has loaded, click on the *Pool Scoring* button. This will bring up a screen that allows you to view the progress of the committee members.



- Once Reviewers have completed all of their reviews, the Chair will receive an email notifying them that the pool review has been completed.



- Chairs will then log into the *Review* section of JagSPOT and select the *Manage Pools* tile. From this page they will select the pool that is indicated in the email notification and click on the *pencil* tool to edit.

15. Once on the *Pool Detail* page, Chairs will now have the option to *Complete Review*. If you are satisfied with the reviews, click that button.

The screenshot shows the 'Pool Builder' interface. At the top, there is a breadcrumb trail: 'Review > Manage Pools > Pool Builder'. Below this, the title 'Scholarship Name' is displayed. To the right of the title are four buttons: 'Cancel', 'Save', 'Complete Review' (circled in red), and 'Cancel Review'. Below the title, there are two rows of form fields. The first row is labeled '* Pool Name:' and contains a text input field with 'Scholarship Name'. The second row is labeled '* Application:' and contains a dropdown menu with 'Scholarship Name' selected, a 'View Scholarships (1)' button, and the text 'Total Number of Applicants: 1'. Below these fields, there is a section titled 'Round 1' with a sub-section also titled 'Round 1'.

16. Chairs will then have the option to start awarding or to begin a new round of review. Once you are ready to start the awarding process click *Start Awarding*.

The screenshot shows the 'Pool Builder' interface. At the top, there is a breadcrumb trail: 'Review > Manage Pools > Pool Builder'. Below this, the title 'Scholarship Name' is displayed. To the right of the title are four buttons: 'Cancel', 'Start Awarding', 'New Round' (both highlighted with a red box), and 'Cancel Review'. Below the title, there are two rows of form fields. The first row is labeled '* Pool Name:' and contains a text input field with 'Scholarship Name'. The second row is labeled '* Application:' and contains a dropdown menu with 'Scholarship Name' selected, a 'View Scholarships (1)' button, and the text 'Total Number of Applicants: 1'. Below these fields, there is a section titled 'Round 1' with a sub-section also titled 'Round 1'.

New rounds can be used to narrow down very large pools of applicants. To start a new round, refer to the instructions above to begin the review process on your own.



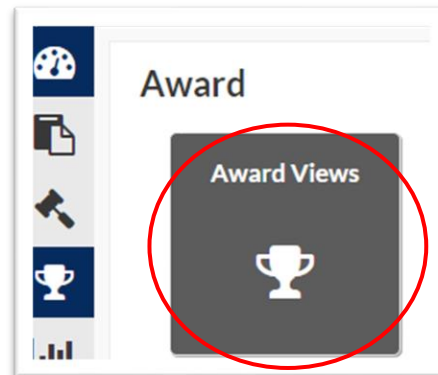
JagSPOT Creating an Award View

This guide will assist you with setting up a new tool for the awarding process for your scholarships. *Award Views* are customizable groupings that allow the awarder to view, rank, and sort all applicants who are eligible to receive an award. These views are unique to the individual awarder.

1. To begin awarding scholarships, create a unique award view to manage the awarding process through. Select *Award* from the left-hand menu and then the *Award Views* tile.

This will show a list of previously created award views.

Award views are individual to the user so you can customize them however you want.



To **create** a new award view click the *Add+* button.

My Award Views

Active Inactive

Name	Number of Scholarships	Review Pool	SmartRank	Edit	Deactivate
FAS 21-22	28	No Pools	N/A		
Scholarship Name	1	No Pools	Scholarship Name		
Scholarship Name	1	fake	N/A		

10 items per page 1 - 3 of 3 items

Add +

2. First, name the award view. These views can be used for multiple cycles so name it something identifiable.

Next, select the specific pool this view is for (if you are reviewing as part of a pool committee) or select *No Pools* if you are awarding individually.

Add Award View

Name:

Pool:

SmartRank:

Manage Scholarships

Total Applicants	Total Awarded	Remaining Budget
0	\$0.00	\$0.00

Student ID Name Award Amount Review Score

No records available.

10 items per page 0 - 0 of 0 Items

Nominate Save Cancel

If *No Pools* selected, a list of possible scholarships will be generated to choose from. Use the filters to identify scholarship(s) to be included in the award view.

Use the check boxes to include them in your award view and press save.

Select Scholarship(s): Scholarships Selected
0

<input type="checkbox"/>	Scholarship	Organization	Department	Award Year	Number of Applicants
<input checked="" type="checkbox"/>	Scholarship Name	Training		2122	5

Add Award View

Name:

Pool: Manage Scholarships

SmartRank: ✎ +

Total Applicants	Total Awarded	Remaining Budget
0	\$0.00	\$0.00

Student ID	Name	Award Amount	Review Score
No records available.			

10 Items per page 0 - 0 of 0 Items

Nominate Save Cancel

If you would like to use a *SmartRank*, you can select it from the drop-down menu.

To create a new *SmartRank*, click on the Plus button. See *SmartRank* guide for more detailed instructions.

3. The award view now shows a list of students who are eligible for the award and is ready to begin awarding.

If you need to nominate a student who did not match to the scholarship you can do that by clicking the *Nominate* button and entering the student's Jag number.

EDIT AWARD VIEW

Name: Scholarship Name

Pool: Scholarship Name Manage Scholarships (1/1)

SmartRank: ✎ +

Total Applicants	Total Awarded	Remaining Budget
1	\$0.00	\$9,999.00

Student ID	Name	Award Amount	Review Score
J00450930	Autumn Courtney	\$0.00	100

1 10 Items per page 1 - 1 of 1 Items

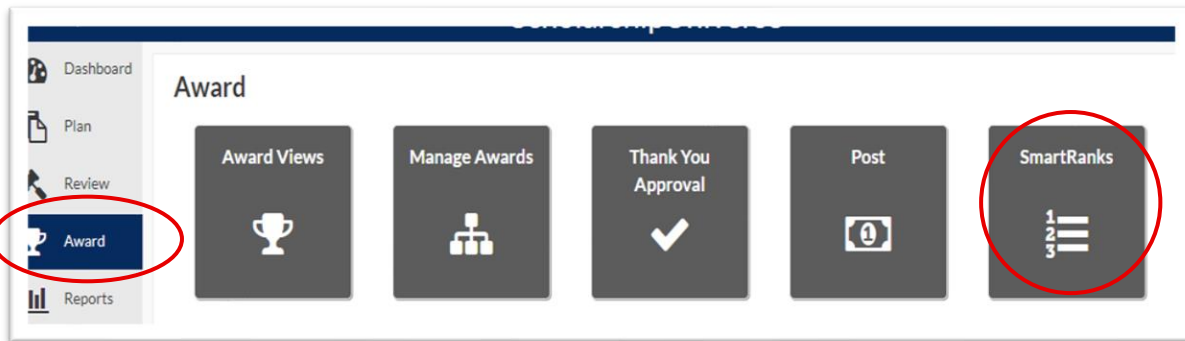
Nominate Save Cancel



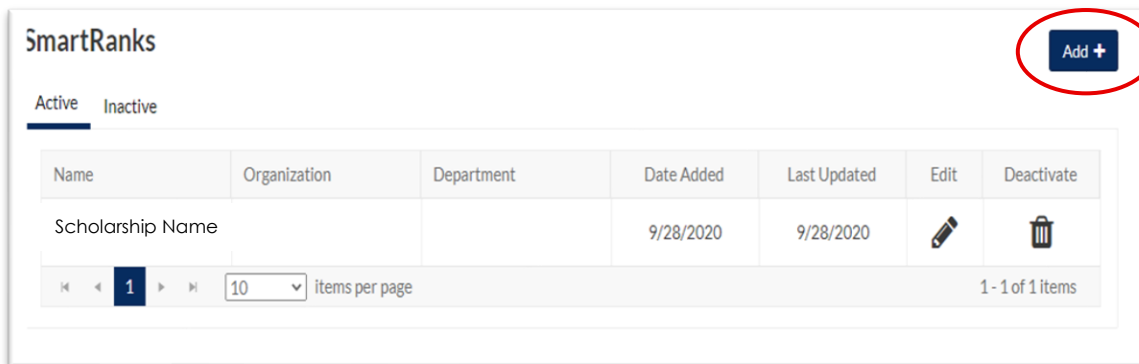
JagSPOT Using SmartRanks

SmartRanks are used to rank applicants who already meet the matching requirements of a scholarship using multiple criteria. This feature allows committees to quickly see a stack ranking of candidates and eliminate inconsistency in awarding. *SmartRanks* can be predefined as outlined below or can be created or updated during awarding in the Award View screen. When applied, the *SmartRank* will create a weighted numeric score for each candidate and an ordinal ranking for each that can be sorted or filtered on in the Award Views screen.

1. Login to JagSPOT and select *Award* on the left-hand navigation bar, followed by the *SmartRanks* tile.



2. To create a new *SmartRank* select the *Add+* button.



3. From here, users are able to search for application questions and Banner student data such as institutional or High School GPA, SAT/ACT scores, or residency.

As requirements are added to the *SmartRank*, users will assign weights in relation to other requirements. These percentages must equal 100%.

Item	Multiple Answers	Direction	Weight (%)	Edit	Delete
Review Score		Ascending	50%		
HIGH_SCHOOL_GPA		Ascending	25%		
RESIDENCY_DESCRIPTION			10%		

Total Weight: 85%

Non-numeric factors can also be added to into the *SmartRank*, such as residency description or major. To do this, select the requirement, then select the operator (equal to, any of these, none of these) and assign an amount value.

- Once a *SmartRank* has been created it can be used for any scholarship under review. To implement the newly created *SmartRank*, navigate back to the scholarship in the *Plan* tab. Then select the *Candidates* tab and use the drop-down menu to select the *SmartRank*.

Student ID	Name	Candidate Ty...	Created	Matching	View Application	Award Amount
J00450930	Autumn Courtney	Applicant	09/24/2020			\$

- Once the *SmartRank* has been selected, the applicants will be reordered to reflect the values in the *SmartRank*. From here, the application materials can be viewed using the *Binocular* icon and they can be forwarded for awarding using the \$ icon.

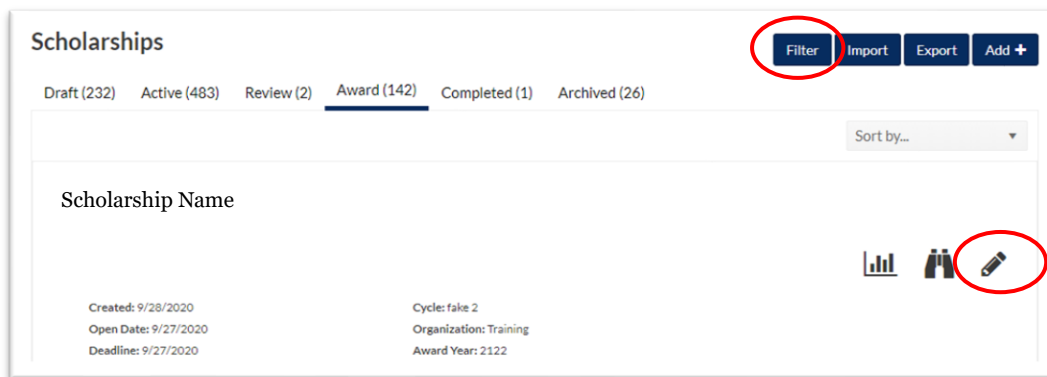
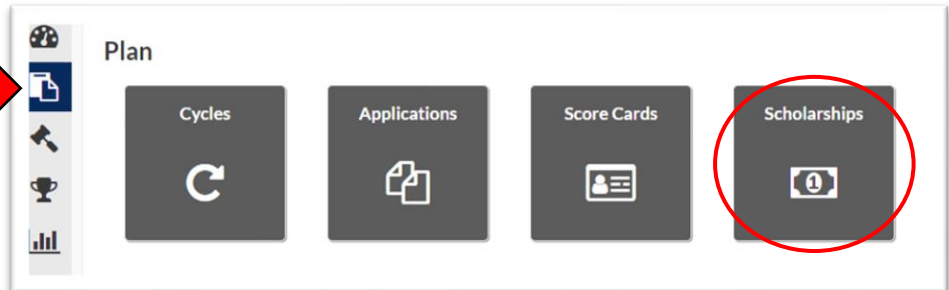
View Application	Award Amount



JagSPOT Awarding Direct Award Applications

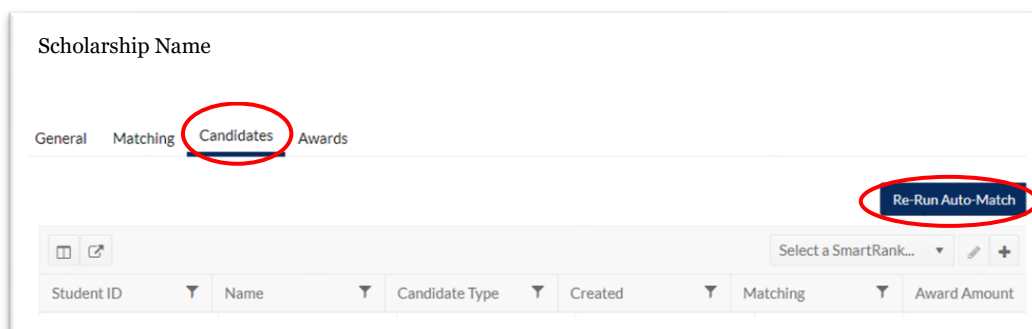
This guide will assist you with Direct Award Applications (previously Auto-Match) and the awarding process. **Direct Award Applications do not have a committee review option in JagSPOT.**

4. To award Direct Awards navigate to *Plan* on the left-hand navigation bar and then select the *Scholarships* tile.



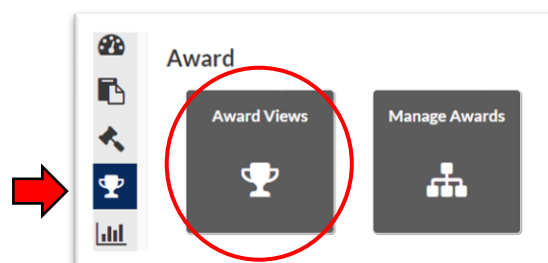
5. Locate the scholarship to be awarded using the filter function and click on the *Pencil* icon to edit the award.

6. Select the *Candidates* tab, and then click on the *Re-Run Auto-Match* button to ensure you have the most current list of eligible students.

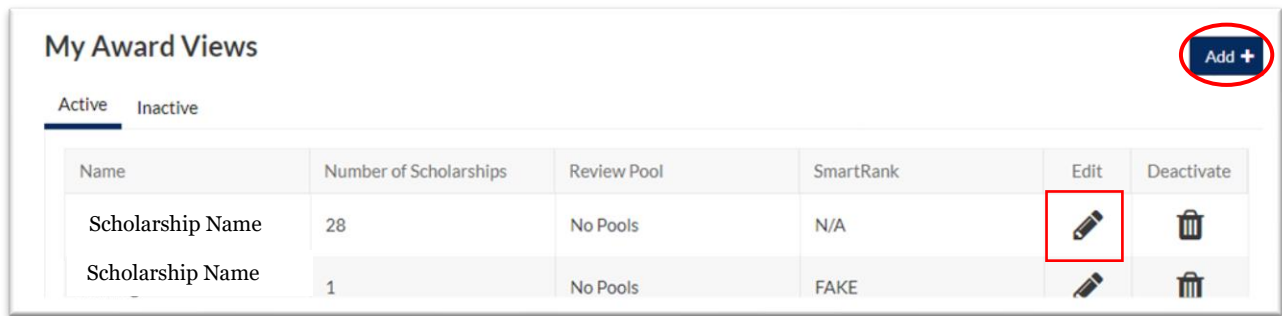


While the auto-match is re-running the button will be greyed out. This may take several minutes.

7. Next, proceed to *Award* on the left-hand navigation bar and click on *Award Views*.

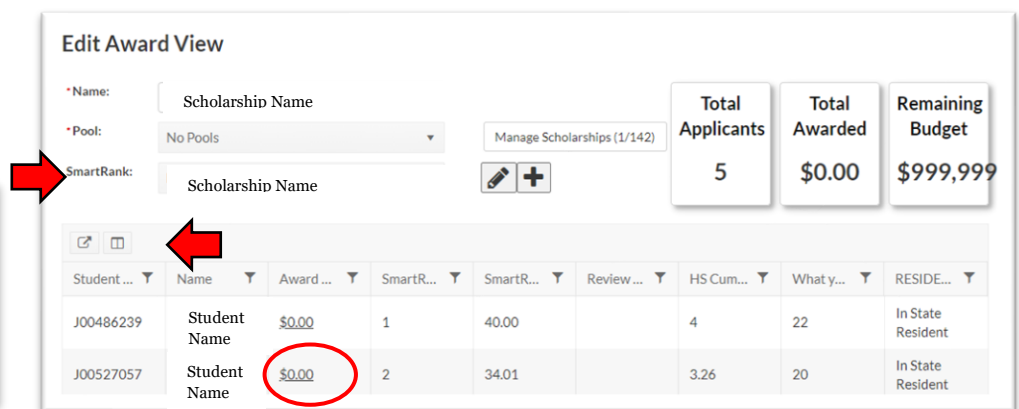


- If an award view has already been created for this scholarship, select that view by clicking on the corresponding *Pencil* icon. If not, create a new award view by pressing the *Add+* button (detailed instructions can be found in the Creating Award Views Document).

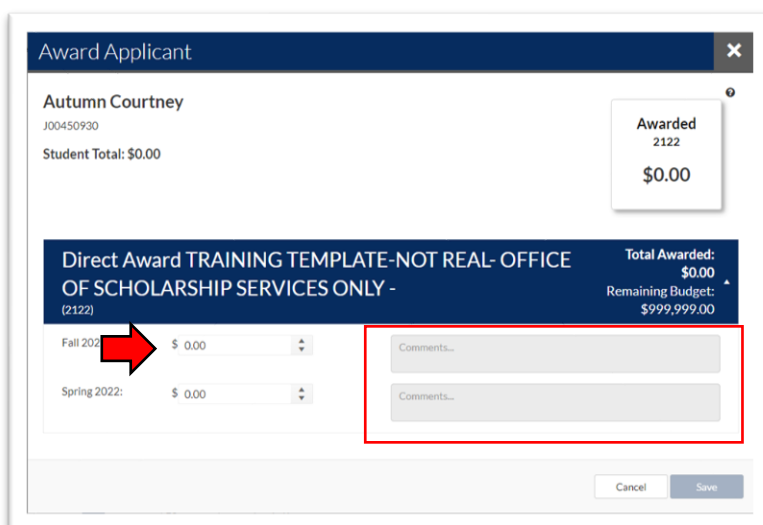


- Once inside the *Award View*, a list of eligible students will be visible.

SmartRanks and or the *Column Manager* can be used to add additional information from the student's file to your view.



- After identifying the students to be awarded, click on the *\$0.00 Award Amount* next to their name. This will pull up an awarding window.



In this window you will enter the dollar amount you are awarding the student into the corresponding award term. There is also a box for comments if you would like to make notations for the record.

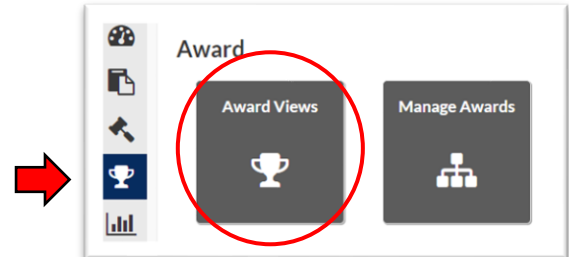
- Once you have allocated all of the awards in the award view, save your work and alert your Opportunity Administrator that awards are ready to approve.



JagSPOT Awarding Internal Application Scholarships

This guide will assist with the awarding process for Scholarships with an Internal Application (previous known as conditional applications). Detailed instructions for the reviewing process can be found in the Reviewing and Rubrics For Internal Applications Quick Start Guide.

12. First, select to *Award* on the left-hand navigation bar and click on *Award Views*.

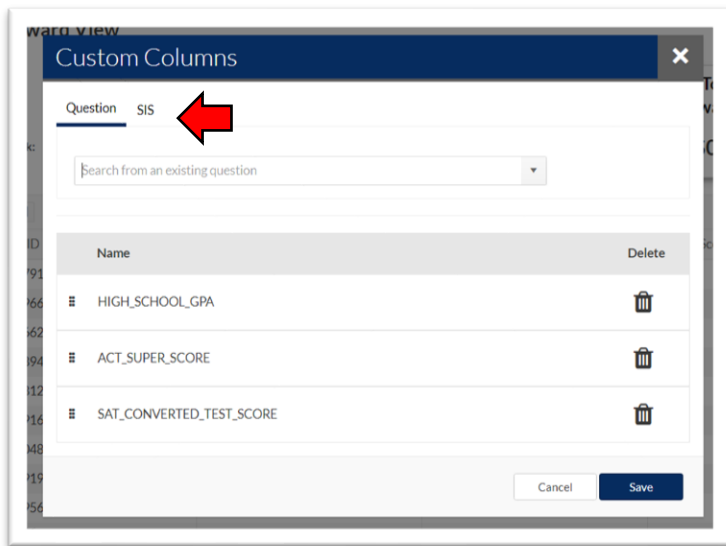


13. If an award view has already been created for this scholarship, select that view by clicking on the corresponding *Pencil* icon. If not, create a new award view by pressing the *Add+* button (detailed instructions can be found in the Creating Award Views Document).

Name	Number of Scholarships	Review Pool	SmartRank	Edit	Deactivate
Scholarship Name	28	No Pools	N/A		
Scholarship Name	1	No Pools	FAKE		

14. Once inside the *Award View*, a list of eligible students will be visible. *Column Manager* can be used to add additional information from the student's file to your view.

Student ID	Name	Award Amount	Review Score	HS Cumulativ...	ACT_SUPER_S...	SAT_CONVER...
J00688791	Student Name	0.00		4.2	23	0
J00685966	Student Name	0.00		4.59	25	0

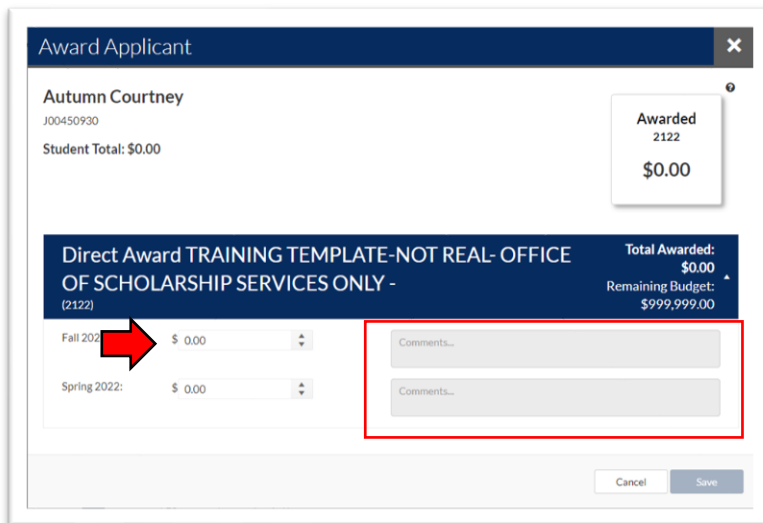


15. A pop-up window will appear to allow you to search via Questions or SIS Data. Refer to the list of frequently used SIS Data Codes on the Scholarship Services JagSPOT knowledgebase.

Use the pop-up window to search for and add any columns you may find useful, such as:

- HIGH_SCHOOL_GPA
- ACT_SUPER_SCORE
- SAT_CONVERTED_TEST_SCORE

16. After identifying the students to be awarded, click on the \$0.00 Award Amount next to their name. This will pull up an awarding window.



In this window you will enter the dollar amount you are awarding the student into the corresponding award term. There is also a box for comments if you would like to make notations for the record.

17. Once you have allocated all of the awards in the award view, save your work and alert your Opportunity Administrator that awards are ready for approval.

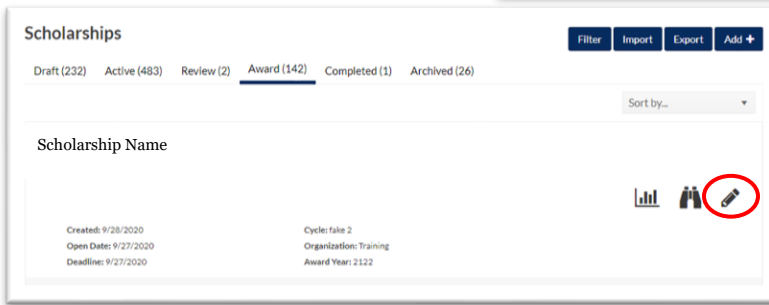
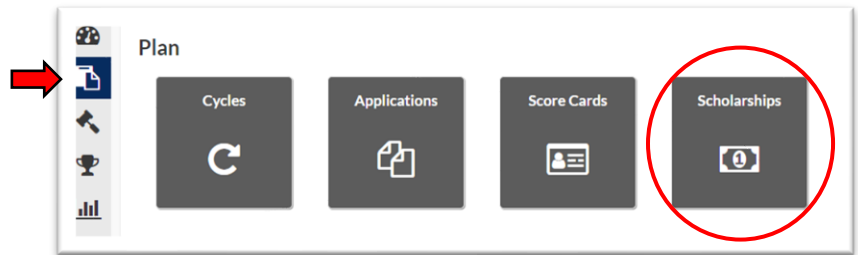


JagSPOT Awarding Internal Applications with Continuous Awarding Applications

This guide will assist you with Internal Applications with Continuous Awarding and the awarding process. **Internal Applications with Continuous Awarding do not have a committee review option in JagSPOT.**

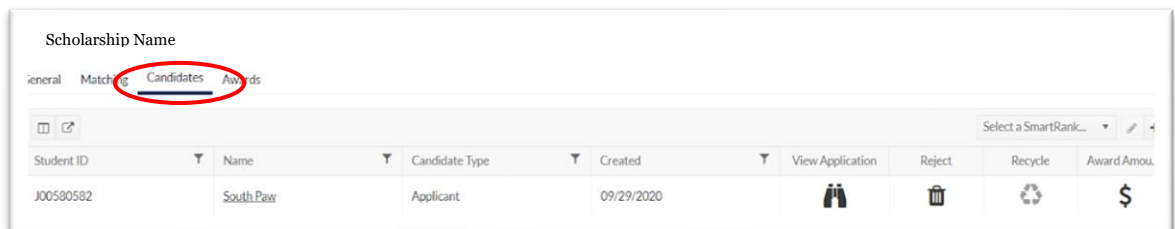
Awarding While Scholarship Is Still Accepting Applications

1. Navigate to *Plan* on the left-hand navigation bar and then select the *Scholarships* tile.

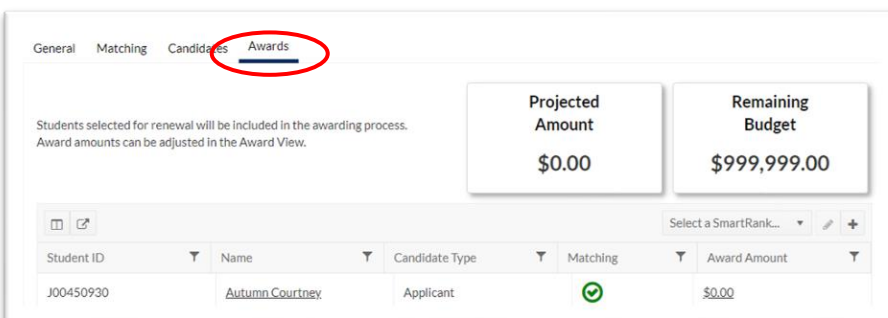
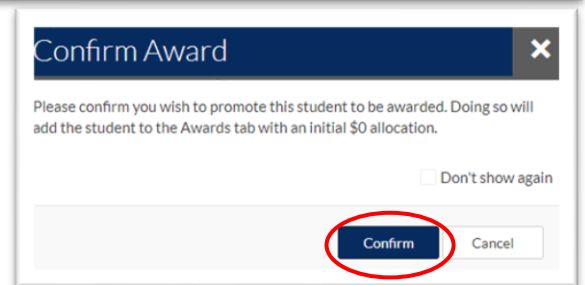


2. Locate the scholarship you will be awarding and click on the *Pencil* icon to edit it.

Select the *Candidates* tab. This will show a current list of applicants. Applications can be viewed by clicking on the *Binocular* icon.



3. Once applicants have been reviewed, they can be promoted to the award screen by clicking on the \$ in the *Award Amount* column. This message will automatically appear, click *Confirm* if this is indeed the student you want to award.



4. Once students have been promoted to be awarded, move to the *Awards* tab to enter their award amounts. Click on the *\$0.00 Award Amount* next to their name. This will pull up an awarding window.

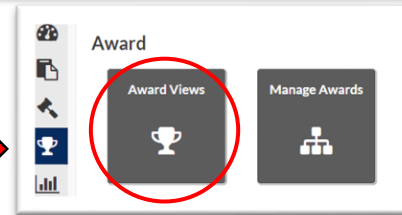
- In this window enter the dollar amount being awarded to the student into the corresponding award term.

There is *box for comments* if you would like to make notations for the record.



Awarding Once the Scholarship Is Closed

- Navigate to *Award* on the left-hand navigation bar and click on *Award Views*.



- If an *Award View* has already been created for this scholarship, select that view by clicking on the corresponding *Pencil* icon.

My Award Views

Active Inactive

Name	Number of Scholarships	Review Pool	SmartRank	Edit	Deactivate
Scholarship Name	28	No Pools	N/A		
Scholarship Name	1	No Pools	FAKE		

Add +

If not, create a new award view by pressing the *Add+* button (detailed instructions can be found in the Creating Award Views Document).

- Once inside the *Award View*, a list of eligible students will be visible.

SmartRanks and or the *Column Manager* can be used to add additional information from the student's file to your view.



Edit Award View

Name: Scholarship Name

Pool: No Pools

SmartRank: Scholarship Name

Manage Scholarships (1/142)

Total Applicants	Total Awarded	Remaining Budget
5	\$0.00	\$999,999

Student ...	Name	Award ...	SmartR...	SmartR...	Review ...	HS Cum...	What y...	RESIDE...
J00486239	Student Name	\$0.00	1	40.00		4	22	In State Resident

- After identifying the students to be awarded, click on the *\$0.00 Award Amount* next to their name. This will pull up an awarding window.

In this window you will enter the dollar amount you are awarding the student into the corresponding award term. There is also a box for comments if you would like to make notations for the record.



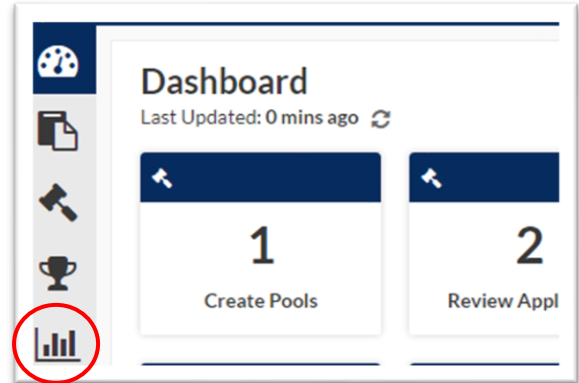
- Once all awards in the *Award View* have been awarded, save your work alert your Opportunity Administrator that awards are ready for approval.



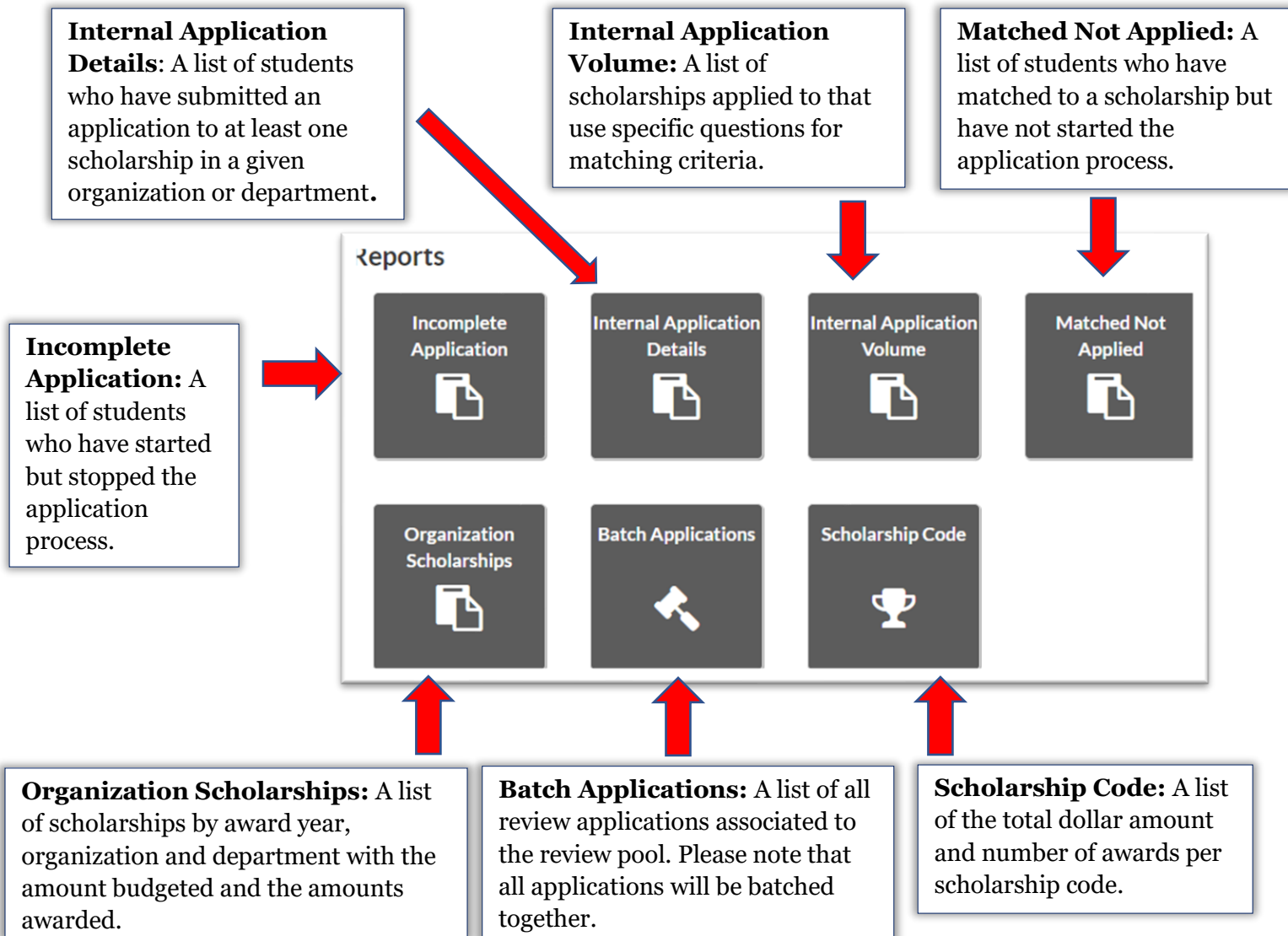
JagSPOT Pulling Reports

This guide will assist you with the pulling of reports in JagSPOT. Reports can be used to access information about your scholarships, applicants, and potential applicants.

1. To begin pulling a report, use your single sign on to access JagSPOT.
2. Next, select the *Reports* section on the left-hand navigation bar.

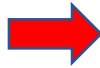


3. First, name the award view. These views can be used for multiple cycles so name it something identifiable.



4. After selecting the appropriate report tile, a window will pop-up asking for specific parameters for the report. Enter these fields to locate the desired information then press the *Submit* button.

If you ever forget what information a report pulls, the pop-up window will give you a brief summary.



The image shows a pop-up window titled "Matched Not Applied Reporting" with a close button (X) in the top right corner. The window contains the following text and fields:

Enter the following criteria to generate a CSV file containing the students who have matched to a scholarship but have not started the application process.

Award Year
Select... ▼

Organizations

Scholarships

At the bottom right of the window, there are two buttons: "Submit" (highlighted with a red circle) and "Cancel".

5. JagSPOT will now send a copy of the report to your JagMail.