The University of South Alabama
Office of Scholarship Services

JagSPOT
Opportunity Administrator Instructions
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Administrator User Roles- Opportunity Administrator

Opportunity Administrators (OAs)

- Typically someone that is a fund holder, or has been assigned signature proxy for the fund holder, and has the authority from their Dean to award scholarships.
- OAs can only work within their assigned "scopes," which are areas of responsibility that are defined within JagSPOT. “Scopes” are used, for instance, to make sure that an OA from one area is not able to make changes to opportunities that are owned by another college or school.

OAs can do the following (within their scopes):

- Request new portfolios and opportunities;
- View applications to all opportunities within their scopes, and process those applications;
- Determine groups of reviewers, and get them started on inspecting qualified candidates;
- Make actual award offers to students, as well as decline others;
- Run reports on applicants, applications, award disbursements, population selections, and reviewer groups (including scores and notes).

OAs cannot do these things:

- Edit portfolios, opportunities, reviewer groups, or applications outside their assigned scopes;
- Create or manage other administrator users within JagSPOT;
- Edit the system-wide “General Application”;
- Edit other system-wide settings like styles and content, email templates, and application categories.
An “Opportunity Administrator” may gain access to JagSPOT by going to the Office of Scholarship Services’ website, www.southalabama.edu/scholarships.

Click on the JagSPOT Login button, located on the left side of the screen.

Log in using your Jag Number. (e.g. J00000000)

Use your JagMail Password.
Opportunity Administrator Portal Overview

When an “Opportunity Administrator” (OA) signs into his/her JagSPOT account, he/she will encounter the “Dashboard.” This page displays a real time picture of the health and status of the current opportunities and applications. The “Dashboard” information displayed to OAs is restricted by “Scope.” That is, data is pulled only from opportunities which an OA can access.

By clicking on the data displayed, OAs can access customized grids and take action or generate reports as needed.
Custom Log-On Experience for Administrators

Each OA has the ability to customize what they see when they first log in: a custom dashboard or the portfolios page. In order to set your preference, select the “user menu” button in the top right corner of the screen (that displays your name) and choose “Account Details” from the drop down. Then select the option you would like to see when you first log in.

Custom Dashboard Cards

OAs have the ability to create up to 8 of their own custom dashboard cards from any grid view in JagSPOT. This will allow the option to display information on the dashboard that is most useful to the work flow. Once created, these cards will act as a shortcut, taking you directly to the full-scale grid view. Unlike saved grid views, which are shared, custom dashboard cards are personal cards that you can add, delete, and rearrange.

Upon logging in and visiting the dashboard for the first time, OAs will see a page with some brief instructions to creating a custom dashboard card. These instructions will only display until they create their first custom dashboard card.
A custom dashboard card can be created from any grid in JagSPOT. Once a grid has been filtered and saved to display the desired information, click on the "create a new dashboard card" icon to create the card.

Assign a name to the new dashboard card that is being created.

Once “Create” is selected, a message will appear at the top of the screen indicating that the new card has been created. To view the card click the link “your dashboard” in the message bar.
Portfolio vs Opportunity

The “Portfolios” page includes the scholarship opportunities linked to the OA.

Portfolio

It helps to think of the “Portfolios” page a bit like a digital filing cabinet. In a paper application process, application packets are (1) collected from applicants, (2) placed into a file folder to collect all related applications and materials together in one place, (3) labeled with the name of the scholarship or funding opportunity they are associated with, and (4) the folder is filed away into a filing cabinet for safe keeping.

A “Portfolio” holds information for only a specific time period. An “Opportunity” will be archived, and removed from the general view of a “Portfolio” after the close of each cycle. However, the data will continue to be available to OAs for reporting purposes.

This “Portfolio” houses one (1) “Opportunity.”
“Portfolios” hold some information about the scholarship, award, or other financial opportunity that remains static from year to year, such as:

- **Name of the “Opportunity”**
- **Fund Code**
- **Auxiliary Fund Code**
- **Fund Amount** (the current available funding for the “Opportunity”)
- **Donor** (linked donor profile page)
- **Scopes** (which “Opportunity Administrators” may access the “Opportunity” information)

Additionally, settings regarding renewable features are also stored at the “Portfolio” level.
The scholarships to which applicants apply are referred to as “Opportunities” in the JagSPOT system.

JagSPOT mimics the “Portfolio” organizational method by collecting all applications, and application materials, into a bundle known as an “Opportunity.” The “Opportunity” is placed inside the “Portfolio,” which is labeled with general information about the scholarship or funding opportunity.

Information stored at the “Opportunity” level includes:

- **Details**: The start date, deadline date, and reviewing period dates for the “Opportunity”; the number of awards and typical award amount (for the given year or cycle); and the advertised description of the “Opportunity.”
- **Questions**: Any questions that are specifically asked of applicants applying for this specific “Opportunity” (i.e., the supplemental application.)
- **Qualifications**: The criteria which an applicant must meet in order to be eligible for an award.
- **Applications**: The collection of applications submitted to the “Opportunity” for the given period.
- **Reviews**: The collection of reviewer information and evaluation forms related to the reviewing process for the given period.
- **Communications**: Customized emails and other on-screen message templates for those receiving the award.
- **Post-Acceptance**: The collected administrative information used to follow-up with award recipients after receiving an award offer, such as the submission of thank-you letters.
• **Association with the Conditional Application(s):** If the “Opportunity” utilizes one or more “Conditional Applications,” Opportunities may be associated with the application(s) to gather additional information from qualified applicants.

**Auto-Match vs Apply-To Opportunities**

When a scholarship opportunity is created in JagSPOT, it must be designated as one of the following options:

- **Auto-Match:** Students are automatically matched to opportunities and placed into the application profile.
- **Apply-To:** Students are matched internally with opportunities the system thinks are a good fit (based on established criteria) which are then recommended to the student.

**General Application Stage**

1. The applicant submits a complete “General Application.”
2. The applicant’s responses are then paired with any available imported data.
3. JagSPOT will compare all “General Application” and imported information against the criteria of all “Auto-Match” and “Apply-To” opportunities.

**Opportunity Qualification Stage**

**Auto-Match:** If the applicant meets the minimum criteria for an “Auto-Match Opportunity,” an application to that “Opportunity” will be generated and placed into the application profile without any further intervention by the applicant. If the applicant fails to meet the minimum criteria, no application is generated. Additionally, no rejection email or decline notice is generated -- the unqualified applicant is simply ignored.

**Apply-To:** If the applicant meets the minimum criteria for an “Apply-To Opportunity,” JagSPOT will include the “Opportunity” on the applicant’s “Recommended Opportunities” list. If the applicant does not meet the minimum criteria, the “Apply-To Opportunity” will not appear.

**Note:** If information on the “General Application” or imported data changes at any point and a formerly qualified applicant is no longer qualified, the application will not be removed from the application profile. Instead, the application will be flagged as "unqualified" and OAs can choose to prevent the application from moving forward to reviewing committees if desired. **An OA can eliminate these applicants from their default view- essentially eliminating them from the process.**

The student import file updates nightly so these changes will be allowed to append and overwrite existing student and applicant data until the close date of the “Opportunity.”
**Note:** The absence of a response (such as blank imported data or no response to an optional question) does not register as disqualified for the purposes of recommending “Apply-To” opportunities. This absence of information will, however, prevent an applicant from receiving a qualification point on a submitted application.

Apply-To Opportunity

If the “Opportunity” appears in the list of “Recommended Opportunities,” the expectation is that applicants will manually apply to the “Opportunity.” Once the applicant submits an application, by responding to all required “Supplemental Questions,” JagSPOT will compare the additional information against any additional criteria.

If at this point the applicant continues to meet all of the minimum criteria for the “Opportunity,” the application is noted as qualified by the system. If the applicant fails to meet any of the additional criteria based on “Supplemental Questions,” their application is flagged as unqualified. Administrators can easily identify unqualified applicants and prevent them from moving forward to reviewing committees if desired.
Supplemental Questions for Opportunities

In addition to the information provided by the Student Import and the General Application, “Apply-To” scholarship opportunities have the ability to include “Supplemental Questions” that applicants should answer when applying for the scholarship. These questions can be required or optional for the applicant to complete. Use the “Questions” tab to review the “Supplemental Questions.”

Note: If “Supplemental Questions” need to be updated, please contact the Office of Scholarship Services.

Options for Application Question Types

- **Open Ended**
  Applicant may type in his or her own response (with some limitations.)
  - Short Answer*
  - Number - No Decimal
  - Number - With Decimals
  - Date*
  - Phone Number*
  - URL*
  - Essay*
  - *This question type is not ideal for qualification criteria

- **Choose One**
  Applicant can only choose one correct response (ex: yes or no.)
  - Radio Buttons
  - Single-Select List

- **Reference Request**
  Used for letters of recommendation
  - Name and Email Address

- **Choose Multiple**
  Applicant may choose several responses (ex: what sports have you played?)
  - Checkboxes
  - Multi-Select List

- **File**
  - File Upload
  - Embed URL (youtube..)
Qualification Criteria for Opportunities

Qualification criteria are used to help OAs locate the right applicants for opportunities. JagSPOT compares qualification criteria set for each “Opportunity” against “General Applications,” “System Imports,” “Conditional Applications,” and “Apply-To” questions to identify qualified candidates. Use the “Qualifications” tab to review.

*Note: If qualification criteria needs to be updated please contact the Office of Scholarship Services.*

Understanding Qualification Criteria Logic

One of the greatest benefits of JagSPOT is its ability to think about all of the opportunities, and the applicants, and then make low-level decisions about who is a qualified applicant and who is unqualified. In order for JagSPOT to determine if applications are qualified or unqualified, the “Opportunity” must have at least one qualification group.

**Rule #1:** All qualification criteria within a single qualification group must all be true all at the same time in order for an applicant to be considered qualified by that group.

In the example above, a qualified applicant must be a Graduate level student majoring in Elementary Education with a minimum 3.0 Overall GPA.

**Rule #2:** Administrators can designate more than one kind of applicant as qualified with "or" statements.

If using a question from the "Choose One" or "Choose Multiple" types, more than one acceptable response may be used which will permit variations in the type of qualified applicant. In the above example, an Undergraduate or a Graduate level student would be qualified for an award (as long as they are also Elementary Education majors with a 3.0 GPA or higher.)

Alternatively, additional groups can be created to provide a separate scenario for another type of qualified applicant.
Rule #3: All qualifications are read *simultaneously*. The order of qualifications or qualification groups does not have any impact. JagSPOT will read and compare all qualification criteria simultaneously.

In the above example, Graduates and Undergraduates are given **equal consideration**. There is no explicit preference for Graduate applicants simply because they are listed in the first qualification group.

Rule #4: Qualification groups are read *independently* of one another. While all criteria contained within a single qualification group must be true all at the same time in order to qualify an applicant (see Rule #1), each qualification group is read independently. This means any information contained in one group has no impact or interaction with any other qualification group.

Rule #5: *Short Answer* questions that are answered by the applicant do not work well as qualification criteria. Occasionally, administrators may need to add qualification criteria for which the only available question is a short answer. Administrators are discouraged from hand-typing qualified answers to use as qualification criteria. This is because these types of responses are difficult to predict accurately.
Reference Requests/Requirements

References / Letters of Recommendation

Many Opportunities require that applicants provide personal or professional references with their applications. JagSPOT provides a special “Reference Request” field type that can be included on any “Apply-To Opportunity.”

*Note: If a “Reference Request” needs to be updated please contact the Office of Scholarship Services.*

When applicants encounter this question, it will look similar to the following:

- When an applicant provides a name and email address to contact for a “Reference,” JagSPOT manages the process by sending an email to that address informing the recipient of the request.
- When a Reference logs into JagSPOT (via the email they received), he/she will be able to provide the reference.
- The Reference can be asked to provide a letter – either as an upload or in simple text format (typed directly into JagSPOT).
• Another option available allows the Reference to complete a questionnaire.

The questionnaire may look something like this:

A note for the reference provider may be included. This may express gratitude for their time and participation, specific instructions about filling out the reference, a reminder of confidentiality, and contact information for questions, deadlines, or anything else needed.
Reference Request Status

“Opportunity Administrators” can review the status of a reference request within the “Applications” grid. First, locate the reference request column, expand the column if needed. The “Reference’s” name will be accompanied by the status of the request.

**Return to Drafted:** The “Reference” has completed and submitted the request. The “Returned to Drafted” option should only be used if the “Reference” needs to update their submission. *Contact the Office of Scholarship Services to complete this process.*

**Requested:** The “Reference” has been notified of this request, but has not yet logged into JagSPOT to begin.

**Drafted:** The “Reference” has received the notification, logged in, and started the reference request, but the “Reference” has not yet submitted their recommendation.
OAs can use the “Applications” tab to review all the current applications for a specific Opportunity. This grid provides the applicants’ “Imported Information,” “General Application,” and “Opportunity Specific Questions.” OAs can customize the grid view by applying filters, selecting which columns to include as well as rearranging the columns.

*Note: See “How to Build and Export Reports” on page 24 to learn more.*

**View:**
OAs can review each applicants’ Imported Information, General Application, and the Opportunity Specific Questions by clicking the “View” link located to the far left of the applicant’s name.

**Category:**
Provides the OA with each applicant’s current opportunity specific application status. (“Drafted,” “Submitted,” “Offered,” etc.)

**Qualification Points:**
An applicant’s “Qualification Points” are calculated automatically. When an applicant matches all of the criteria in a qualification group, the system will generate one point in this column for the applicant.

In most cases this number will be 0 or 1, but it is possible to gain more points depending on how the qualifying criteria are designed. Additionally, all applications receiving 0 qualification points will appear highlighted in red.
View

When the OA clicks on the “View” link for an applicant the “General Application” information is provided first, followed by the “Opportunity Specific Questions,” and then the applicant’s “Imported Information.”

Qualification Points

By clicking on an applicant’s “Qualification Points” in the “Applications” grid, the OA can review how an applicant compares to the qualification criteria. If an applicant matches a Qualification Group exactly then the applicant will be identified as “Qualified.”
If an applicant does not match the qualification criteria then the applicant will be identified as “Not Qualified.” All qualifications not met will be highlighted in red.

OAs can return to the opportunity specific Applications grid by clicking the “Applications” link at the top of the applicant’s application page.
JagSPOT offers two approaches to assign applications to reviewers. Administrators should think carefully about which type of assignments will function best for their unique process.

**Note:** If a Reviewer Group needs to be created or updated please contact the Office of Scholarship Services.

**Automatically Assign** - Applications for each associated “Opportunity” within a “Reviewer Group” will be automatically assigned to reviewers included in the group. This can be further filtered using the “Only Qualified Applications” setting or reviewer group qualification criteria.

**Manually Assign** – Administrators will be able to determine each application that each individual member of the “Reviewer Group” should evaluate.
Award Letter: In-System Offer

Once a student is notified they have been offered a scholarship, they will be directed to accept the offer in JagSPOT. When the student logs in to accept the scholarship they will have the opportunity to read their “In-System Offer.” This letter is housed on the “Communications” tab within the specific Opportunity. The award letter typically congratulates the student, outlines the details of the scholarship and includes any Terms and Conditions related to the scholarship.

*Note: To update an award letter please contact the Office of Scholarship Services.*
Sending Ad Hoc Emails

“Opportunity Administrators” may send customizable “Ad Hoc” emails to selected groups of users at any time by taking the following steps.

1. Select all intended email recipients from the grid (up to 50 at once).

2. Locate the “Act on Selected” drop-down menu at the bottom of the grid and choose the “Email Users” option.

3. A new window will open allowing the OA to customize the email. Start by choosing the “From” sender for the email. The OA may select from the default system email address or his/her own email address.
4. Next, create a “Subject line” and “Body” message for the email.

5. Click “Add Cc/Bcc Recipients” link to add a secondary email address.

6. When finished, click the green “Send Emails” button at the bottom of the page. The OA can confirm the emails were sent by checking the “Email Log” for any of the selected users.
How to Build and Export Reports

JagSPOT offers the ability to customize the layout of grids so that OAs may filter data to show only desired information. Administrators may also save these filters as customized "Views" within their Opportunity, allowing him/her to quickly return grids to filtered states or generate custom Excel reports. The grid views an OA creates will be attached to the specific Opportunity created. All OAs and Chairs who have access to the Opportunity will also have access to this grid view.

How to Filter Application/Reviews Grid

There are several ways in which an OA may change the layout and/or visibility of data within grids. The grid control panel, located at the top of the grid, provides the following options:

1.) Default View: Allows the OA to set a particular grid as the default view.
2.) Create View: Allows the OA to create and save a particular grid view.
3.) Download View: Allows the OA to export the grid view. The OA will receive an email from JagSPOT with the report once it has been generated.
4.) Expand View: Allows the OA to enlarge the grid view to see more data at one time.

Drag and Drop

Columns: Simply click on any column heading and drag it to a new location. The data in the column will follow.

Drop-Down Menus: The OA can also use drop-down menus to sort applications by category or opportunities by status.
Search for Specific Information: Use the search box below any column heading to locate records that only contain a particular response. Tip - Hover the mouse over the (i) button for help creating more detailed search filters.

Re-Order Information in a Column: Click on any column heading to re-sort all records from least to greatest or (click a second time) greatest to least by response for that particular column. This also works to sort records from A - Z or Z - A.

How to Save a Filter Grid View

If an OA plans to use the same filters again in the future, he/she should consider creating a “Saved Grid View.” This allows the OA to restore the filters at any point in the future with just a few clicks.

1. Filter the grid to view the desired information.

2. Click on the “Create New Saved View” button.
3. Choose a descriptive name and click on the green "Create" button to create the saved view.

The saved grid view will now appear in the **Saved Views** drop-down menu.

**How to Create a Default Grid View**

If a saved grid view has been created that is particularly useful, the OA may choose to have this as the default view of any grid.

1. Create the saved grid view and select it from the drop-down menu.

2. Click on the “Default View” button (the star should light up).

The saved view will now be the default view of this grid.

**How to Update or Delete Saved Grid Views**

After a grid view has been saved to the “Saved Grid Views” drop-down menu, administrators may update the settings for a view or delete the view from the system as needed.

**To Update a Saved Grid View:**
1. Select the grid view from the “Saved Grid Views” drop-down menu.
2. Make any necessary changes to the filters for the grid.
3. Click on the “Save Current View” button to save the changes.
To Delete an Existing Saved Grid View:

1. Select the view from the “Saved Grid Views” drop-down menu.
2. Click on the “Delete Saved View” button.
3. JagSPOT will present a confirmation window to confirm the decision to delete the view. Click Okay to process the deletion of the view.
4. The saved view will no longer appear as an available selection in the drop-down menu.

How to Generate and Download an Excel Report

OAs may export their view report to a CSV file which can then be opened with Microsoft Excel. To request a new report, simply look to the lower left corner of the Opportunity’s application/review grid and click on the downward arrow (download button). Please note that the report will generate the grid data that is selected in the drop-down menu to the left.

Depending on the number of records in the grid, the report may take a few moments to generate.

Once the report is complete a message will flash at the top of the screen. An email containing a link to the report will be sent to the email address on record for the requestor.
Awarding Process

The typical awarding process begins with the members of each “Reviewer Group” reviewing the applications and providing a score for each applicant. The Reviewer Chair will then make the selection(s) of who should receive the scholarship by categorizing the applicant(s) as “Selected Reviewer Chair.” The Chair will notify the OA of this selection. Finally, the OA will review the selections made and, if approved, will categorize the applicant as “Approved Opportunity Administrator.” This will trigger the scholarship to be offered to the applicant.

How to “Approve-Opportunity Administrator”

1. Click on the Opportunity's “Applications” tab and a grid of all applications will appear. The applicants who have been categorized as “Selected Reviewer Chair” will be indicated in the Category column.

2. To categorize the scholarship’s recipients as “Approved Opportunity Administrator,” check the small box to the left side of each row for the applicant(s) who should receive an offer.
3. Once applicants have been selected, choose “Categorize” from the “Act on Selected” drop down list.

OAs can also select applicants in bulk—provided they are being awarded the same amount, and being awarded for the same award term/year.

To bulk select, click the check box located at the top left of the grid view. Clicking this box will then select every applicant in the grid.
4. The “Categorize Selected” window will appear. Be sure to choose “Approved Opportunity Administrator.” The Chair should have already indicated the award amount, and award period, so there is no need to reenter this information. However, if the OA wishes to make an update to the information, that can be done here. Select the “Categorize” button to move forward.

5. The “Applications” grid will now reflect the applicant’s category as.
   *This process may take a few moments to reflect.
Student Notifications
Once a student has been selected as a scholarships recipient, an award notification is sent to their JagMail account. This award notification informs the student they have been selected to receive a scholarship and instructs them to accept the offer in JagSPOT.

JagSPOT also sends the following notifications to students:

- Confirmation of Application
- Award Offer Reminder
- Post-Acceptance Request
- Reference Request Reminder
- Reference Request Submission Confirmation

Note: The student’s application category will automatically update from the “Offered” status to the “Accepted” status as soon as the student accepts the scholarship offer.
Once an applicant is offered a scholarship in JagSPOT, a post-acceptance application will be automatically generated for that award. The post-acceptance application allows Opportunity Administrators to track the processing and disbursement of funds for the award within JagSPOT. OAs can monitor the applicant's post-acceptance application from the opportunity's Post-Acceptance Applications page.

The Post-Acceptance application includes student data collection questions, a donor thank you letter request as well as the Family Educational Rights and Privacy Act (FERPA) Release of Personal Information statement. This application must be completed by the recipient and submitted in order for the acceptance process to be finalized and the scholarship to be processed to the student account.

Should the applicant choose to Decline the award (or if an OA later determines the applicant must be Declined for other reasons), the original application will move into a Declined category and the post-acceptance application will disappear from the system (since there is no longer a disbursement of funds to track.)

How to Monitor the Post-Acceptance Process
All opportunity applications in the "Offered" or "Accepted" category will also have an entry in the Post-Acceptance Applications grid. Because this grid tracks award offers after the application process has completed, this grid has five categories to organize and track the actual awarding of funds:

Pending: An award offer has been extended, but the applicant has not yet Accepted or Declined the offer.

Requested: An award offer has been Accepted, but the applicant has not yet completed the post-acceptance questionnaire.

Drafted: The applicant has started responding to the post-acceptance questionnaire but has not yet completed it.

Completed: The post-acceptance questionnaire has been completed (and is waiting for review by the Office of Scholarship Services).

Awarded: The Office of Scholarship Services has determined the award can be made and that the monetary funds can be disbursed.

Opportunity Administrators can build and export reports from the Post-Acceptance grid by following the steps outlined in the How to Build and Export Reports section on pages 25-29. OAs may also request specific reports be built by the Office of Scholarships Services that can be exported at any time.
Conditional Applications

“Conditional Applications” allow administrators to present supplemental applications to targeted groups of applicants as part of the “General Application.” They also allow administrators to combine multiple applications with similar criteria into one group application.

Administrators may create as many different qualification groups as needed to guide as many different types of students to the “Conditional Application” as desired.

Applicants will be matched or recommended to associated opportunities by meeting the minimum criteria set on those opportunities, or by answering a “trigger question” during the “General Application” process.

*TIP*

This is a great way to provide one application process for multiple scholarships, those that have the same criteria within a program or department.

Conditional Applications – Use

Some common examples of how “Conditional Applications” might be used include:

- **Targeting Applicants by Area of Study**: Students from the School of Business will be presented with a Business School “Conditional Application” that must be completed in order to be considered for any opportunities managed by the School of Business. Students from other colleges and schools will not see this application or be able to complete it.

- **Targeting Applicants by Classification**: Graduate students will be prompted to complete a “Conditional Application” with questions specific to graduate students.

- **Targeting Applicants by Funding Type**: Grant applicants will be asked different questions than scholarship applicants.

*NOTE: To discuss the potential for “Conditional Applications,” please contact the Office of Scholarship Services.*
Accessing Archived Applications and Opportunities

Once an application cycle ends and JagSPOT goes through the cycle management process, old information from the previous cycle will be archived. When information is archived, it becomes locked and can no longer be updated or changed. To access the previous cycle's Automatically Matching, Apply-To, and Renewal opportunities and applications, take the following steps:

1. Locate the desired opportunity's portfolio on the Opportunity tab's Portfolios menu All Portfolios page. Be sure to click into "Portfolio Details" to open the portfolio.

2. Once inside the portfolio, click on the Opportunities tab to open up a list of all past, present, and future opportunities.

3. Once on the Portfolio's Opportunities tab, click into the desired opportunity.
4. Once the opportunity is open, click on the Applications tab.

5. The opportunity's Applications tab displays a list of all applications generated for that opportunity. The applications will appear at their final categories, such as Submitted, Accepted, or Declined. You may filter applications or create custom reports normally, but you may not change the applications' categories, generate new award offers, or create ad hoc emails.
<table>
<thead>
<tr>
<th><strong>Glossary</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Act On Selected:</strong> The “Act on Selected” drop down provides the “Opportunity Administrator” with the options to “Email Users” or “Categorize” applicants.</td>
</tr>
<tr>
<td><strong>Ad Hoc Email:</strong> A customizable “Ad Hoc” email can be created by an “Opportunity Administrator” in the event the OA needs to communicate with a selected group of users.</td>
</tr>
<tr>
<td><strong>Applications Tab:</strong> The “Applications” tab includes the collection of applications submitted to the “Opportunity” for the given period.</td>
</tr>
<tr>
<td><strong>Apply-To:</strong> An “Apply-To Opportunity” requires an applicant to manually apply for the scholarship and complete any required “Supplemental Questions,” if applicable. If the applicant meets the minimum criteria for an “Apply-To Opportunity,” JagSPOT will include the “Opportunity” on the applicant’s “Recommended Opportunities” list. If the applicant does not meet the minimum criteria, the “Apply-To Opportunity” will not appear on the “Recommended Opportunities” list.</td>
</tr>
<tr>
<td><strong>Auto-Match:</strong> An “Auto-Match Opportunity” is a scholarship that automatically reviews all students within JagSPOT to capture all those who meet the qualifications for that “Opportunity.” If an applicant meets the minimum criteria for an “Auto-Match Opportunity,” an application to that “Opportunity” will be generated and placed into the application profile without any further intervention by the applicant. If the applicant fails to meet the minimum criteria, no application is generated. Additionally, no rejection email or decline notice is generated -- the unqualified applicant is simply ignored.</td>
</tr>
<tr>
<td><strong>Award Letter- In-System Offer:</strong> The award letter or “In-System Offer,” which is housed on the “Communications” tab, will appear to the applicant when he/she logs in to JagSPOT to accept a scholarship offer. The award letter should congratulate the student, outline the details of this scholarship, as well as, include any Terms and Conditions related to the scholarship. The award letter may also include donor information.</td>
</tr>
<tr>
<td><strong>Category:</strong> An applicant’s “Category” is the status in which the “General Application” and/or the opportunity specific application is currently in (i.e. “Drafted,” “Submitted,” “Selected Reviewer Chair,” “Approved Opportunity Administrator,” “Offered,” and “Accepted.”)</td>
</tr>
<tr>
<td><strong>Communications Tab:</strong> The “Communications” tab includes the opportunity specific award letter (“In-System Offer”).</td>
</tr>
<tr>
<td><strong>Conditional Application:</strong> A “Conditional Application” allows OAs the ability to consolidate common questions from a subset of opportunities in a single application that can be used as a follow-up step to the “General Application.”</td>
</tr>
<tr>
<td><strong>Dashboard:</strong> The “Dashboard” displays a real time picture of the health and status of the OAs current opportunities and applications.</td>
</tr>
<tr>
<td><strong>Details Tab:</strong> The “Details” tab of an “Opportunity” includes the opportunity specific information including, the start date, deadline date, and reviewing period dates for the “Opportunity”; the number of awards and typical award amount (for the given year or cycle); and the advertised description of the “Opportunity.”</td>
</tr>
<tr>
<td><strong>General Application:</strong> The “General Application” is the primary application that must be completed in order to be considered for any “Opportunity.” It contains a series of questions requesting responses directly from the applicant.</td>
</tr>
<tr>
<td><strong>Grid View:</strong> “Opportunity Administrators” have the ability to customize the layout of grids so they may filter data to show only desired information. OAs may also save these filters as customized “Views” within the system, allowing them to quickly return grids to filtered states or generate custom Excel reports.</td>
</tr>
</tbody>
</table>
Opportunity Administrator: The “Opportunity Administrator” user role is typically used for fund holders, academic unit heads or fund designees, etc.

Opportunity: An “Opportunity” is housed within the scholarship’s “Portfolio.” Opportunities include the “Details,” “Questions,” “Qualifications,” “Applications,” “Reviews,” “Communications,” and “Post-Acceptance” information for the “Portfolio.”

Portfolio: A “Portfolio” represents a scholarship and is like a digital filing cabinet. The “Portfolio” houses all the general information about the scholarship. Within this filing cabinet is the “Portfolio’s” opportunities.

Post-Acceptance Tab: The “Post-Acceptance” tab includes questions directed to the scholarship recipient for USA Development and Alumni Relations purposes along with the Family Educational Rights and Privacy Act (FERPA) Release of Personal Information statement.

Qualification Group: A “Qualification Group” contains the qualification criteria required for an applicant to be eligible for the scholarship (i.e. minimum GPA, major, classification status, etc.)

Qualifications Tab: The “Qualifications” tab includes the “Opportunity” specific criteria which an applicant must meet in order to be eligible for consideration.

Qualified: A “Qualified” applicant is defined as an applicant who meets the minimum qualification criteria for a scholarship opportunity.

Questions Tab: The “Questions” tab of an “Opportunity” includes the “Supplemental Questions” that are specifically asked of applicants applying for the specific “Opportunity.”

Recommended Opportunities: An applicant’s “Recommended Opportunities” list is comprised of all the opportunities JagSPOT has determined the applicant meets the minimum qualification criteria for, and therefore is eligible for consideration.

Reference “Drafted” Status: The “Drafted” status indicates that the “Reference” has received the notification, logged in, and started the reference request. The “Reference” has not yet submitted their recommendation.

Reference “Requested” Status: The “Requested” status indicates that the “Reference” has been notified of this request but has not yet logged into JagSPOT to begin.

Reference “Return to Drafted” Status: The “Return to Drafted” status indicates that the “Reference” has completed and submitted the request. This option should only be used if the “Reference” needs to update their submission. Contact the Office of Scholarship Services to complete this process.

Reference Request Status: The “Reference Request” status is defined as the stage in which the “Reference Request” is currently in (i.e. “Return to Drafted/Submitted,” “Requested” or “Drafted.”)

Reference Requests: A “Reference Request” is a request sent to a “Reference” to complete a recommendation letter and/or a questionnaire for an applicant.

Reference: A “Reference” is an individual selected by an applicant to serve as a reference provider.

Reviewer Chair: A “Reviewer Chair” (RC) is a member of a “Reviewer Group” who has been given additional permissions from the “Opportunity Administrator.” RCs have the ability to review the “Opportunity” details, applications and reviewers by the “Reviewer Group.” RCs also have the authority to categorize applications as “Selected Reviewer Chair.”
**Reviewer Groups:** An “Opportunity” that requires individuals to review the applications for selection will utilize a “Reviewer Group.” The “Reviewer Group” is comprised of USA Faculty/Staff who serve as members of the scholarship’s application review committee.

**Reviewer:** A “Reviewer” is an individual who is a member of a “Reviewer Group” in order to evaluate scholarship applications. “Reviewers” should be USA Faculty/Staff members.

**Reviews Tab:** The “Reviews” tab includes the collection of reviewer information and evaluation forms related to the reviewing process for the given period.

**Rubrics:** A “Rubric” can be used by a “Reference” and/or a “Reviewer” to score an applicant based on predetermined areas of review (i.e. academic achievement, community service, leadership involvement, etc.)

**Scope:** A “Scope” is an “Opportunity” that is linked to an “Opportunity Administrator” and “Reviewer Group” (if applicable).

**Student Import:** The Student Import includes all the student’s data that is imported from USA’s student database, Banner.

**Supplemental Questions:** The “Supplemental Questions” are the scholarship application questions that the applicant is requested to answer in order to apply for an “Apply-To Opportunity.” These questions can be made as required or optional for the applicant to complete.

**Terms and Conditions:** A scholarship’s Terms and Conditions are the requirements and expectations the applicant should agree to uphold in order to receive the scholarship.

**Unqualified:** An “Unqualified” applicant is defined as an applicant who does not meet the minimum qualification criteria for a scholarship opportunity.