JagSPOT Opportunity Administrator User Guide

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

Office of Scholarship Services
scholarships@southalabama.edu | 251-461-1958
Rebecca Venter-Lombardo | rvente@southalabama.edu
Lauren Williams | laurenwilliams@southalabama.edu
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JagSPOT Understanding 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.

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.

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.

| 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. |
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).

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

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

**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.

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**Sample Scholarship (Internal Application) : Open**

**Scholarship Information**

- **Name**: Sample Scholarship (Internal Application)
- **Department**: Arts and Sciences
- **Fall 2021**
- **Open Date**: 8/1/2020
- **Deadline**: 8/15/2021

**Donor**: Financial Aid Office

**Award Year**: 2022

**Terms**: 202210

**Max Applicants**:
- **Acceptance Required**: Yes
- **Thank You Required**: Yes
- **Approval Required**: No

**Description**: This scholarship was created to assist a student with their tuition charges. You must have a 3.0 institutional GPA to apply.
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 awarer to view, rank, and sort all applicants who are eligible to receive an award. These views are unique to the individual awarer.

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.

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.
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.

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 has not applied for the scholarship you can do that by clicking the Nominate button and entering the student’s Jag number.

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.
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%.

4. 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.

6. 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.

Non-numeric factors can also be added 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.
This guide will assist Opportunity Administrators with the approving awards as the final step in the awarding process.

1. Once the committee chair has allocated award funds to students in JagSPOT, Opportunity Administrators must provide final approval in JagSPOT before students will be notified of their award. To do this, log into JagSPOT using your single sign on.

2. The first screen will be your dashboard of quick links. You can access the awarding portal two ways:
   a. Selecting the Award tab on the left hand navigation bar.
   b. Clicking on the Awards to Approve quick link. This will take you directly to step 4.

3. After selecting Award another screen will appear with several options. Select the Manage Awards tile.

4. Once in the Manage Awards portal all students whose awards need to be approved will appear.

   a. To approve all students on the list: click on the top check box and then select the Approve button.
   b. To approve some students on the list: click on the check box next to their names and then select the Approve button.
c. To deny awards: click on the check box next to the name of the student and then select the *Deny* button.

If you will be approving a large number of distinct awards at once, the drop-down menus can be used to filter the number of awards and students visible at one time.

5. Once all awards have been approved, the awarding process is complete. If you need to track student progress on the post acceptance process, you can view a list of students who have accepted their awards by clicking on the *Completed* tab.

If you would like to keep a list of awarded students for your records, a grid view can be exported on this screen by clicking the *Export* icon.
This guide will assist you with canceling awards in various stages of the awarding process. Once awards have been offered, they can be canceled so long as the award term has not yet started.

1. To cancel or rescind an offer navigate to the Manage Awards tile of the Award section.

   This will bring up the Manage Awards Portal.

2. From here you can see which students have been awarded and what stage they are at in the awarding process. From this portal, awards can be removed from students at several stages.

   Students whose awards are in either the Approve or Notify tabs can be canceled by checking the box next to the student’s name and then selecting the Remove button.

   Students whose awards are in the Pending Student Action tab can have their awards removed by checking the box next to the student’s name and then navigating to the Select a waive action drop-down menu and selecting Remove Awards.

3. If a student’s awards have already been pushed to Banner and they appear in your Completed tab, you will need to contact the Office of Scholarship Services with the name and Jag Number of the student whose award you wish to remove.
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 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.

- **Incomplete Application**: A list of students who have started but stopped the application process.
- **Internal Application Details**: A list of students who have submitted an application to at least one scholarship in a given organization or department.
- **Internal Application Volume**: A list of scholarships applied to that use specific questions for matching criteria.
- **Matched Not Applied**: A list of students who have matched to a scholarship but have not started the application process.
- **Organization Scholarships**: A list of scholarships by award year, organization and department with the amount budgeted and the amounts awarded.
- **Batch Applications**: A list of all review applications associated to the review pool. Please note that all applications will be batched together.
- **Scholarship Code**: A list of the total dollar amount and number of awards per scholarship code.
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 popup window will give you a brief summary.

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