The University of South Alabama
Office of Scholarship Services
Jag$POT
Reviewer Chair Instructions
Table of Contents
Before You Begin .......................................................................................................................... 3
Reviewer Chair Walkthrough: ........................................................................................................ 3
Invitation to the System: ................................................................................................................. 3
The Reviewer Chair Portal Overview ............................................................................................... 5
Details ........................................................................................................................................... 6
Applications .................................................................................................................................... 6
Reviews .......................................................................................................................................... 7
Review Period Dates ....................................................................................................................... 7
Reviewing Applications Assigned to the Reviewer Chair .............................................................. 8
How to Build and Export Reports .................................................................................................... 11
  How to Filter Application/Reviews Grid ....................................................................................... 11
  How to Save a Filtered Grid View ............................................................................................... 13
  How to Create a Default Grid View ............................................................................................. 14
  How to Update or Delete Saved Grid Views ................................................................................ 14
    To Update a Saved Grid View: ................................................................................................. 14
    To Delete an Existing Saved Grid View: .................................................................................. 14
How to Generate and Download an Excel Report ........................................................................ 15
How to Select Applicants to Award in an Opportunity ................................................................. 16
Glossary .......................................................................................................................................... 19
Before You Begin

The University of South Alabama’s Scholarship Opportunity Program Tracker allows Faculty and Staff the flexibility to review scholarship applications and opportunities at work, from home, or on the road. JagSPOT may be accessed on any device with internet access, including desktop and laptop computers, tablet computers, and mobile devices. This allows individual members to review applications independently prior to meeting as a committee to make final awards, if applicable.

These instructions will provide an overview of the “Reviewer Chair Portal,” how to review applications, and how to select scholarship recipients. However, these instructions are generic to the review process. “Reviewer Chairs” are encouraged to communicate with the Scholarship “Opportunity Administrator” for specific deadlines and further instructions; all applicant information and dates listed in these materials are for training purposes only.

If you have questions or experience technical difficulties during your review process, please contact the Office of Scholarship Services at scholarships@southalabama.edu or (251) 461-1958.

By participating in this process, all review members understand that they have access to student records which contain individually identifiable information, the disclosure of which is prohibited by the Family Educational Rights and Privacy Act (FERPA). By logging in through the system you are acknowledging this and understand that the disclosure of this information to any unauthorized person is prohibitive.

Reviewer Chair Walkthrough:

The “Reviewer Chair” (RC) role allows “Opportunity Administrators” to grant a higher level of oversight to certain trustworthy reviewers. Although the “Reviewer Chair” is still bound by the visibility settings for reviewers (i.e., only seeing applications at a "Reviewable" category, or only seeing questions and data marked "Reviewable") the RC can be given additional permissions that allow the user to make award offers to applicants from within the “Reviewer Chair Portal.”

The “Reviewer Chair Portal” has been designed to provide a streamlined interface that is both welcoming and intuitive to new users. The display of information and buttons will guide “Reviewers” to complete assigned tasks.

Invitation to the System:

The typical workflow for “Reviewer Chairs,” working in JagSPOT for the first time, begins with an invitation email. The email contains a confirmation link that takes the RC into the system, where he/she will use his/her Jag Number and JagMail Password to access the “Reviewer Chair Portal” for the first time.

If you are also an “Opportunity Administrator,” you have the ability to switch your view from “Administrator” to “Reviewer.” You may do this by hovering your cursor over your name in the top right corner of the screen and then selecting “Reviewer” from the drop down. Once selected, your user role will change to “Reviewer Chair.”
Click on the JagSPOT Login button, located on the left side of the screen.

USA EMPLOYEES - Reviewer Chair Roll:
Sign in on the Applicants and Administrators tab.

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

Use your JagMail Password.
The Reviewer Chair Portal Overview

When a “Reviewer Chair” (RC) logs into the system, they will be directed to their specific landing page. This page will provide the RC with a complete list of all the Opportunities assigned to them.

This review will include two additional key pieces of information:

- **Applications to Chair** - The number of applications visible in a grid view (see the “Applications” tab below). This includes applications for the “Opportunity” that are in a reviewable category.

- **Reviews to Chair** - The number of reviews assigned for the “Opportunity” through the “Reviewer Group” the user chairs. That is, the number of saved or submitted reviews visible to the “Reviewer Chair” (see the “Reviews” tab below).

To review information for a specific “Opportunity,” select that “Opportunity” name (link) from the list.

Within that “Opportunity” an RC will be provided with three specific views- designated by tabs:

- “Details”
- “Applications”
- “Reviews”
Details

When an RC clicks on an “Opportunity” name, he/she will automatically land on the “Details” tab. This tab displays the same information visible to “Opportunity Administrators” within the “Details” tab of the “Opportunity,” however, it cannot be edited.

*The RC can only view this information and is unable to modify it.*

Applications

An RC will also have access to the “Applications” tab. Similar to an “Opportunity's” “Applications” grid, this RC grid displays applications for the “Opportunity” that are currently set as a “Reviewable” category. Only questions and imported data set to be "Reviewable" will be displayed in this grid. All other application information will be hidden from the “Reviewer Chair.”

*Note: See “How to Build and Export Reports” on page 11 to learn more.*

*View:* RCs 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. Again, the RC will only see the information that has been made reviewable by the “Opportunity Administrator.”
RCs can return to the opportunity specific “Applications” grid by clicking the “Applications” link at the top of the applicant’s application page.

**Reviews**

An RC will also have access to the “Reviews” tab. Similar to an “Opportunity’s” “All Reviews” grid, this “Reviewer Chair’s” “Reviews” grid displays all reviews assigned through the group for which the user is a “Reviewer Chair.”

The RC may filter this information, create saved grid views, and generate reports. An RC cannot update the submission status of a review or make changes to reviewing assignments.

**Review Period Dates**

The RC’s access to applications and reviews is still controlled via the “Opportunity's” “Review Period” setting. RCs will not gain access to applications or assigned reviews until the “Begin Review Period” date arrives. Once opened an RC will maintain access until cycle management is completed. The “End Review Period” date will have no effect on the RC (except to lock in any reviewing assignments to complete.)
Reviewing Applications Assigned to the Reviewer Chair

An RC can begin reviewing applications assigned from the landing page.

To begin review work on an applicant, select the “Begin” button.

While reviewing an individual application, an RC can use the “Review” and “Application” tabs to toggle back and forth between reviewing and evaluating. The “Application” tab reveals all reviewer-visible applicant data.
Clicking on the “Side-by-Side” button will launch a full-screen view of both the “Review” and “Application” tab information. RCs may work in this full-screen view as long as needed and, when ready to return to the normal view, select the “Exit Side-by-Side” button.

An RC can temporarily save the evaluation and return to it again later by selecting the “Save” button. A temporary score will appear beside the evaluation.

When completely finished with the evaluation, select the "Submit" button. Once submitted, scores and answers are displayed to Administrators as part of the application’s “Reviewer Score” inside the “Administrator Portal.”
During the open review period, an RC can return to the “Reviewer Portal” and will be provided with the following three options:

- “Begin” button - to start working on a new application (not yet saved or submitted)
- “Resume” button - to return to a saved review and continue working
- “Update” button - to update a submitted review (prior to the “End Review Period” date)

Once the “End Review Period” date has passed, data will no longer be accessible to an RC.
How to Build and Export Reports

JagSPOT offers the ability to customize the layout of grids so that “Reviewer Chairs” may filter data to show only desired information. RCs may also save these filters as customized “Views” within the “Opportunity.” The grid views created will only be attached to the specific “Opportunity.” All “Opportunity Administrators” and RCs who have access to the “Opportunity” will also have access to this grid view.

How to Filter Application/Reviews Grid

There are several ways to change the layout of data within the grids:

**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:** Drop-down menus can be used 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 the response for that particular column. This also works to sort records from A-Z or Z-A.
How to Save a Filtered Grid View

If the same filters will be used again in the future, consider creating a “Saved Grid View.”

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.
4. Now, click the “Save Current View” button.

The saved grid view will now appear in the “Grid Views” drop-down menu.
How to Create a Default Grid View

If a saved grid view has been created that is particularly useful, this can become the default view of any grid whenever any administrator first comes to that grid in the future.

1. Create the appropriate saved grid view and ensure it has been selected from the drop-down menu.

2. Click on the “Default View” button – represented by a star. The star should light up when selected.

The saved view will now be the default view for this grid. Administrators may select a different saved grid view to designate as the default view by repeating the above steps at any time.

How to Update or Delete Saved Grid Views

After a grid view has been saved to the “Saved Grid Views” drop-down menu, RCs may update the settings for a view or delete the saved 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 the existing saved grid view.

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 saved 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

“Reviewer Chairs” 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.
How to Select Applicants to Award in an Opportunity

1. Click on the “Opportunity’s” “Applications” tab and a grid of all applications for the “Opportunity” will appear. RCs may be interested in the values for “Reviewer Score” and “Qualification Points” columns, or in filtering the grid to locate particular applicants.

2. On the left side of each row there is a small check box. **Check the box** beside each applicant who should receive an offer.

3. At the bottom of the page, use the “Act on Selected” dropdown to choose the “Categorize” option. This allows the RC to place the selected applications into a new category.
4. A new window will open. Choose the "Selected Reviewer Chair" category from the drop-down menu.

5. Enter the award amount in the “Update Amount” box.

6. Choose the “Award Period” this scholarship will be awarded.

The “Award Period” is represented by an aid year (1516, 1617, etc.). When a scholarship offer is made the default is to split the award between the Fall and Spring term. If the scholarship is only for one specific term (Fall or Spring), the RC should select the appropriate aid year and notify the Office of Scholarship Services to insure the offer is applied to the correct term.

Be sure to double check your selections.

7. Select “Categorize.”
8. The RC will return to the “Applications” grid and will notice the applicant’s “Category” will update to “Selected-Reviewer Chair.” This process may take a few moments to update.
**Glossary**

<table>
<thead>
<tr>
<th><strong>Act On Selected:</strong></th>
<th>The “Act on Selected” drop down provides the “Opportunity Administrator” with the options to “Email Users” or “Categorize” applicants.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Applications Tab:</strong></td>
<td>The “Applications” tab includes the collection of applications submitted to the “Opportunity” for the given period.</td>
</tr>
<tr>
<td><strong>Apply-To:</strong></td>
<td>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></td>
<td>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 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></td>
<td>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 the 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></td>
<td>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></td>
<td>The “Communications” tab includes the “Opportunity” specific award letter (“In-System Offer”).</td>
</tr>
<tr>
<td><strong>Conditional Application:</strong></td>
<td>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></td>
<td>The “Dashboard” displays a real time picture of the health and status of the current opportunities and applications.</td>
</tr>
<tr>
<td><strong>Details Tab:</strong></td>
<td>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></td>
<td>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></td>
<td>“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 &quot;Views&quot; within the system, allowing them to quickly return grids to filtered states or generate custom Excel reports.</td>
</tr>
<tr>
<td><strong>Opportunity Administrator:</strong></td>
<td>The “Opportunity Administrator” user role is typically used for fund holders, academic unit heads or fund designees, etc.</td>
</tr>
</tbody>
</table>
**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.