

CAL STATE EAST BAY

Pioneer Scholarship Review Guide

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Using the AcademicWorks Reviewer Portal

When it's time for your reviewers to come into the system and start reviewing applications, they will receive an email giving them instructions on how to log into the system. Once they log into the system they will land on their dashboard and there they will see a list of opportunities or applications that they have been asked to review. They will see the name of the application or opportunity as well as any review dates, the number of reviews assigned as well as the number of reviews that they have completed. By clicking on the link of the reviews assigned, the reviewer will then go to a list of all applications they have been asked to review.

Reviewers can see the details of the opportunity by clicking on the opportunity details to learn a little bit more about the opportunity that they're reviewing. From the list they can begin the reviews by clicking the begin button. The reviewer will then be presented with any reviewer notes whether their opportunity review or specific notes or review or group notes. The first page that they will see is the review tab that contains all the information reviewers are expected to answer about the applications that they are reviewing. On the next tab they can see the application itself and scroll through any information that has been made visible to the reviewer. The last tab is the side-by-side view which will allow them to see the application information at the same time as the review questions. These screens scroll independently so while they're reviewing the application they can easily scroll through the application that will help them score the application.

Once they have completed their review they can then submit the review so that the score can be calculated into the average reviewer score for the applicant. They must answer any questions with an asterisk to submit the review. They will then advance to the next applicant that they have been asked to review. While they are completing the reviews, they can save the review at any time to come back later and finish it up. They also can advance through the applications that they have been asked to review in the upper right-hand corner by clicking the toggle arrows. Lastly, they can collapse any of the applications they are reviewing by clicking on the minus sign next to the application they do not wish to view. They can then click the plus to open it back up to see all the information contained on that application.

To return to the list of applicants that they are reviewing they can click on the name of the opportunity in the top left bread crumbs. Now that they are back on the list of opportunities they can sort this grid by column simply by clicking on the triangle or arrow in the column that they would like to sort the actions column. By default, the grid will reorder itself depending on the amount of work remaining on the reviews. Those reviews that have not been started will be at the top, then they will see any reviews that they have saved but not submitted, and lastly, they will see any reviews that they have submitted. Submitted reviews can be updated if the review period is still open. To return to their dashboard they simply click the opportunities button and return to the list of opportunities or applications that they have been asked to review.

Reviewer Portal Walkthrough: What Do Reviewers See?

The reviewer portal has been designed to provide a streamlined interface that is both welcoming and intuitive to new users. The intuitive display of information and buttons guide Reviewers to complete assigned tasks easily and thoroughly.

Invitation to the System:

The typical workflow for new reviewers working in AcademicWorks for the first time begins with an invitation email. On the **Begin Review Period date** selected by administrators, the reviewer will receive an email inviting them into the system. The email contains a confirmation link that should be clicked on by the reviewer. The link takes the reviewer into the system, where they will pick their password and access the Reviewer Portal for the first time.

The Reviewer Portal:

The Reviewer Portal offers a clean and focused list of assigned tasks. By clicking on the name any assigned opportunity, or the number of assigned reviews, they will be able to view a list of all applications assigned for review.

Opportunities

▼ Matt Frank

✓

You are now signed in as Matt Frank.

BSU Alumni Association Scholarship Winter 2015	Reviews 02/25/2016 - 12/31/2017	Assigned Reviews: 0 of 6 Completed
BSU Spirit Award Winter 2015	Reviews 01/19/2015 - 12/31/2017	Assigned Reviews: 0 of 2 Completed
Dr. Paul Williams Memorial Award Winter 2015	Reviews 01/19/2015 - 12/31/2017	Assigned Reviews: 0 of 3 Completed

If at any time a reviewer would like to review system information about a particular opportunity, they can click on the Opportunity Details button to view the description, applicant deadline, number of awards, and average award amount. They can also sort the information by clicking on the down arrow on any column. One additional click on the Begin button beside any unevaluated applications will take them to another screen where they can get to work.

Opportunities

▼ Matt Frank

BSU Alumni Association Scholarship

Opportunity Details

	Applicant	Assigned	Your Rating	Qualified	Actions
	Emily Engleside	08/15/2017	-	Yes	Begin
	Nelson Northcutt	08/15/2017	-	Yes	Begin

While reviewing an individual application, reviewers can use the Review and Application tabs to toggle back and forth between reviewing and evaluating. The Application tab reveals all reviewer-visible answers on the applicant's General Application, as well as any imported, opportunity-specific, or Conditional Application information (if present.)

Opportunities ▼ Brandon Phipps

You have evaluated **0 of 16 applications** for The Ernest S. Biczak, MD '77, Endowed Scholarship.

[Review](#) [Application](#) [Side-by-Side](#)

The Ernest S. Biczak, MD '77, Endowed... > Allen Smith

Thank you for taking the time to assist with our scholarship selection process! Please contact Jane Smith at 888-123-4567 in the Foundation Office with any questions.

Applicant Provided Information

General Application

1. First Name

Allen

2. Last Name

Smith

3. Address

112233 Congress

Clicking on the Side-by-Side button will launch a full-screen view of both the Review and Application tab information. Reviewers may work in this full-screen view as long as needed and, when ready to return to the normal view, clicking on the Exit Full Screen button will return the reviewer back to the basic Reviewer Portal view.

OPPORTUNITIES > BSU ALUMNI ASSOCIATION SCHOLARSHIP > EMILY ENGLSIDE

6 Reviews 1 ▶ ▶ |

Emily Engleside

General Application

!

Collapse to hide information

1. Current BSU Student Status ⓘ
Current or Returning BSU Student

2. Anticipated BSU Enrollment for Fall ⓘ
15

3. Anticipated BSU Enrollment for Spring ⓘ
12

4. Local High School Attended ⓘ
Story Point High School

5. If you did not attend a local high school listed above, please provide the name and location of the high school you attended:
No answer provided

6. Extracurricular Activities and Community Service: Please note any organizations, clubs, service activities, or volunteering events you have participated in recently.

1. Name of Activity or Service
BSU Cheerleader

2. Date(s) or Year(s) Participated
3 years

3. Type of Participation ⓘ
Extra-curricular Activity

Instructions: Thank you for volunteering your time to help us select the best candidate. Please remember to Submit all reviews before your deadline (if you have one). [Toggle through apps](#) !

Bookmark

☐ Mark this applicant in your list of evaluations so you can easily find them again.

★ Academic Performance

★ Financial Need

★ Supplemental Materials

★ Overall Impression of Applicant

Reviewer Note

B I [] []

Help Preview Edit

↓

↓

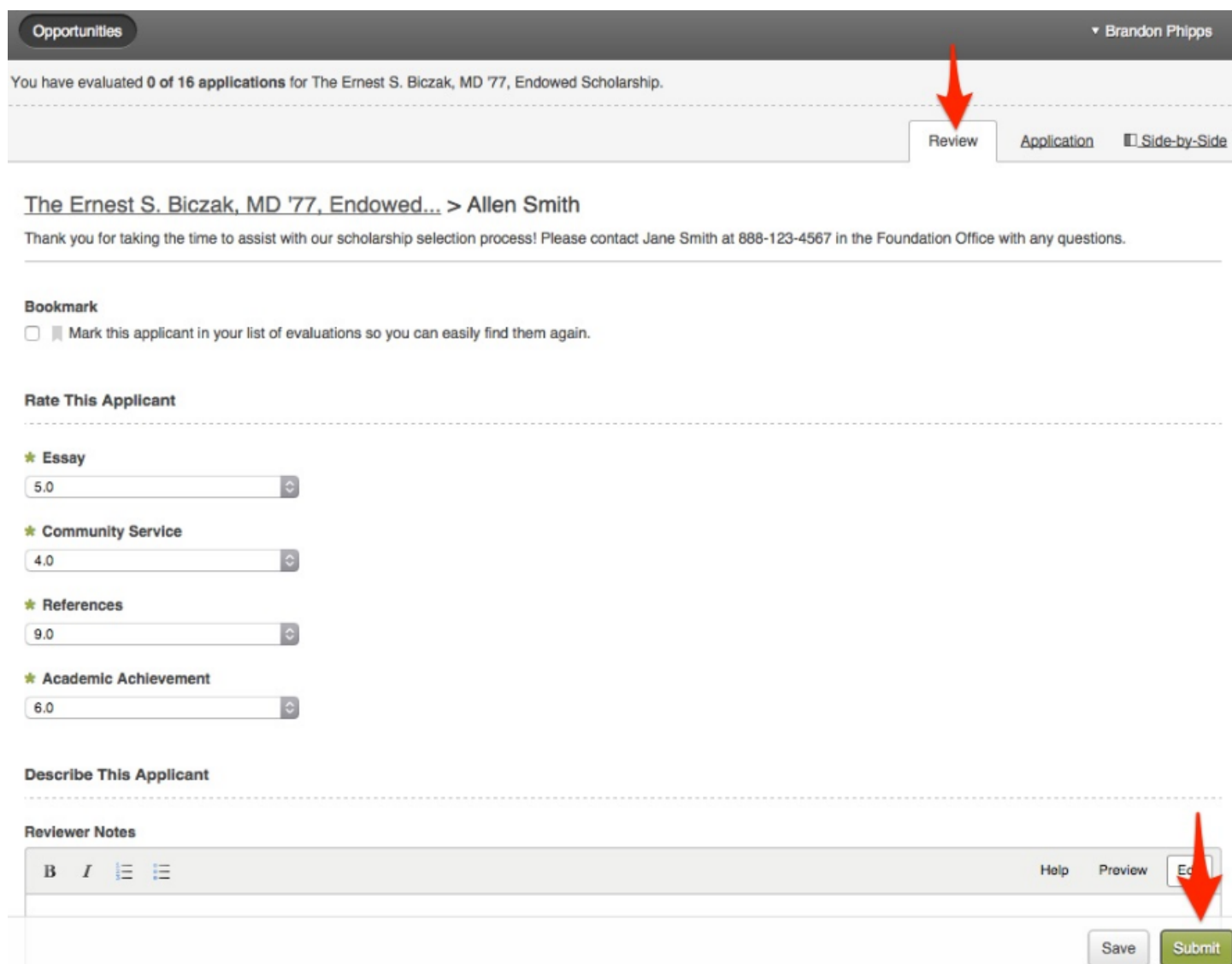
Exit Side-by-Side

Save Submit

4

Reviewers should use the information found on the Review tab to select scores for a particular set of criteria or answer questions. (The exact scoring rubrics and questions that appear are determined by the reviewer group through which the application has been assigned to the reviewer for evaluation. For more information about establishing rubrics and evaluation questions from within a reviewer group, please review "[Customizing and Maintaining Reviewer Groups](#) section.")

- If the reviewer needs to **temporarily save the evaluation and return to it again later**, they should **click on the "Save" button**. A temporary score will appear beside the evaluation in the Reviewer portal only, as well as in the Administrator's "All Reviews" grid.
- When the reviewer is **completely finished** with the evaluation, **they should click on the "Submit" button**. Once submitted, scores and answers displayed to administrators as part of the application's Reviewer Score inside the Administrator portal. **Reviewers can continue updating submitted reviews until the End Review Period date**, when their information will be frozen as-is.



Opportunities ▼ Brandon Phipps

You have evaluated 0 of 16 applications for The Ernest S. Biczak, MD '77, Endowed Scholarship.

Review Application Side-by-Side

[The Ernest S. Biczak, MD '77, Endowed...](#) > Allen Smith

Thank you for taking the time to assist with our scholarship selection process! Please contact Jane Smith at 888-123-4567 in the Foundation Office with any questions.

Bookmark

☐ Mark this applicant in your list of evaluations so you can easily find them again.

Rate This Applicant

★ Essay 5.0

★ Community Service 4.0

★ References 9.0

★ Academic Achievement 6.0

Describe This Applicant

Reviewer Notes

B I [List Icons] [More Icons] Help Preview [Edit Icon]

Save Submit

If the reviewer returns to the opportunity in the Reviewer portal, he or she could see one of three buttons beside any application, in the order of the applications that require the most attention:

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

Opportunity Details			
	Your Rating	Qualified	Actions
	-	Yes	Begin
	-	Yes	Begin
	-	Yes	Begin
	-	Yes	Begin
	5.0	Yes	Finish
	23.0	Yes	Update

Once the End Review Period Date has passed, the reviewer will only be able to "View" the applications and reviews. They will no longer be able to make any changes to scores or responses.

Opportunity Details			
Review Period Ended 			
	Your Rating	Qualified	Actions
	31.0	Yes	View
	0.0	Yes	View

Once the opportunity's applications are archived as a part of cycle management, the reviewer will lose access to the reviews and applications. The listing for the opportunity will be removed from their portal.

The Reviewer Chair Portal

When a Reviewer Chair signs into the system, they will be taken to a landing page that resembles the landing page for basic reviewers. For assignments where the user is a Reviewer Chair, however, two additional pieces of information will be displayed in the listing for the opportunity (or the General Application):

- **Applications to Chair** - The number of applications visible in a grid view (see the Applications tab below). This includes applications for the opportunity (or the General Application) that are in a **reviewable** category.
- **Reviews to Chair** - The number of reviews assigned for the opportunity (or the General Application) through the reviewer group the user chairs. That is, this number of saved or submitted reviews visible to the Chair (see the Reviews tab below).

Opportunities		▼ Rob Thomas
Open for Review		
Foundation Scholars Award Summer 2014	Reviews began 09/25/2014	4 Reviews assigned to you
Terrific Student Scholarship Summer 2013	Reviews began 07/15/2013 15 Applications to Chair • 75 Reviews to Chair	15 Reviews Assigned to You
The Ernest S. Biczak, MD '77, Endowed Scholarship Summer 2013	Reviews began 07/15/2013 18 Applications to Chair • 90 Reviews to Chair	18 Reviews Assigned to You
Closed for Review		
Hammermill International Scholarship Summer 2013	Reviews ended 10/04/2013 2 Applications to Chair • 10 Reviews to Chair	2 Reviews Assigned to You


The Details Tab

When clicking into an opportunity (or the General Application) for which the user is a Chair, they will first encounter 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 Review Chair can **only view** this information and is unable to modify it.*

Details

Applications

Reviews

 **Terrific Student Scholarship**
Summer 2013 | Ended 63 days ago

Portfolio Information

Name

Terrific Student Scholarship

Fund Code

12345

Auxiliary Fund Code

54321
For accounting purposes, et al.

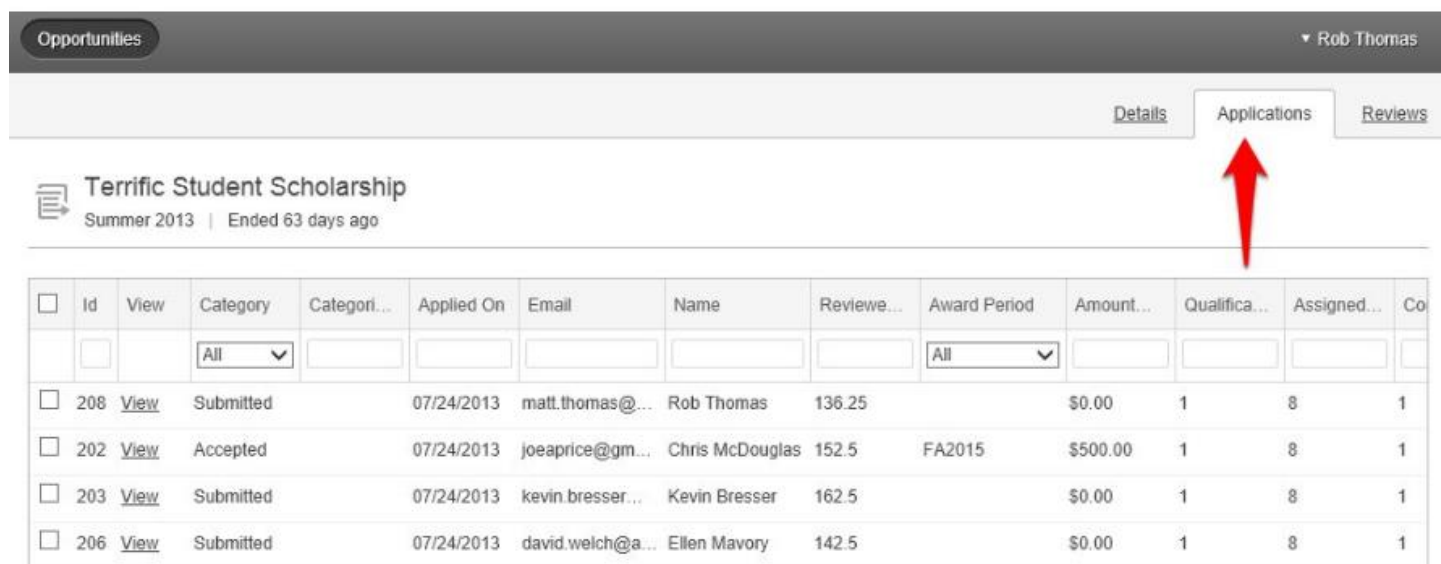
Donor

Temple-Inland Corporate Donor

The Applications Tab

When clicking into an opportunity (or the General Application) for which the user is a chair, they will also have access to an Applications Tab. Similar to an opportunity's Applications grid, this Reviewer Chair grid displays applications for the opportunity that are **currently at a reviewable category**. (Note: This may include more applications than are actually assigned to the reviewer group to review, if group qualification criteria or manual assignments are being used.) If the user is the chair of a reviewer group assigned to review General Applications, this grid will display **all Submitted General Applications**.

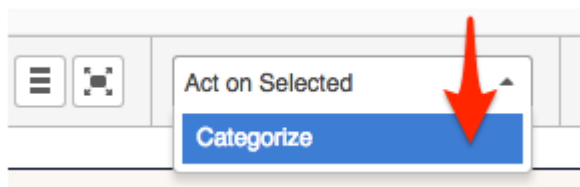
Only questions and imported data set to be "Reviewable" will be displayed in this grid. All other application information will be hidden from the Reviewer Chair.



The screenshot shows the 'Applications' tab selected in the Reviewer Chair interface. The top navigation bar includes 'Opportunities', 'Details', 'Applications' (selected), and 'Reviews'. The user 'Rob Thomas' is logged in. The main heading is 'Terrific Student Scholarship' with subtext 'Summer 2013 | Ended 63 days ago'. Below this is a table of applications.

<input type="checkbox"/>	Id	View	Category	Categori...	Applied On	Email	Name	Reviewe...	Award Period	Amount...	Qualifica...	Assigned...	Co
<input type="checkbox"/>			All						All				
<input type="checkbox"/>	208	View	Submitted		07/24/2013	matt.thomas@...	Rob Thomas	136.25		\$0.00	1	8	1
<input type="checkbox"/>	202	View	Accepted		07/24/2013	joeaprice@gm...	Chris McDouglas	152.5	FA2015	\$500.00	1	8	1
<input type="checkbox"/>	203	View	Submitted		07/24/2013	kevin.bresser...	Kevin Bresser	162.5		\$0.00	1	8	1
<input type="checkbox"/>	206	View	Submitted		07/24/2013	david.welch@a...	Ellen Mavory	142.5		\$0.00	1	8	1

The Reviewer Chair may filter this information, create saved grid views, and generate reports. They may also **move applications into new categories** (unavailable for General Application assignments), provided the Chair has been given access to one or more categories. (This is a setting configured by System Administrators on the Categories.



If the Chair has been **given access** to an encumbering category (including the Offered category), **the Chair may also encumber funds and extend award offers** to applicants without the assistance or intervention of an administrator.

Note: If you have granted Reviewer Chairs the ability to encumber funds, they will be limited by any Minimum Award Amounts or Maximum Award Amounts designated for the associated opportunity.

The Reviews Tab

When clicking into an opportunity (or the General Application) for which the user is a Chair, they will also have access to a 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 chair. *(Note: If a second group is assigned to review applications but the user is not the chair of that group, those reviews will not be visible in this grid. This grid will only display reviews the user chairs.)*

The Reviewer Chair may filter this information, create saved grid views, and generate reports. The user cannot update the submission status of a review, nor can she make changes to reviewing assignments or the reviewer group.

Id	View	Applicant Name	Applicant Email	Applicati...	Reviewe...	Reviewe...	Reviewer Na...	Reviewer Email	Review ...	Review ...	Reviewe...	Rev
336	View	Kevin Bresser	kevin.bresser...	Offered	General S...		Graham Dunlap	gdunlap@aca...	Submitted	07/24/2013	77.14285...	
266	View	Janette Xoff	jfox@mail.ute...	Submitted	General S...		Rob Thomas	matt.thomas@...	Submitted	07/24/2013	91.42857...	
269	View	Chris McDouglas	joeaprice@qm...	Submitted	General S...		Rob Thomas	matt.thomas@...	Submitted	07/24/2013	64.28571...	

Review Period Dates

The Reviewer Chair's access to applications and reviews is still controlled via the opportunity's (or the General Application's or Conditional Application's) Review Period dates. Chairs will not gain access to applications or assigned reviews until the Begin Review Period date arrives. Once the Chair gains access to applications and reviews, they will maintain access until cycle management is completed. The End Review Period date will have no effect upon the Chair (except to lock in any reviewing assignments the Chair was assigned to complete.)

How to Create Your First Reviewer Group

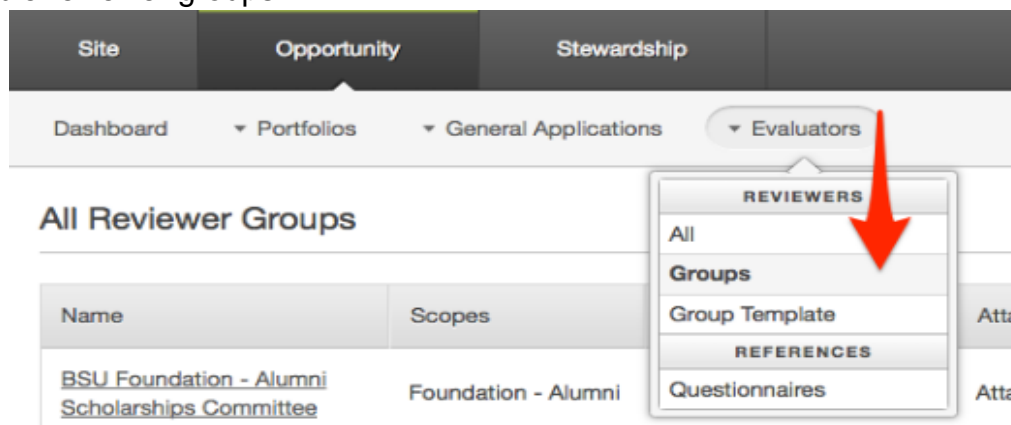
Reviewer Groups can be created and managed through the Site Administrator portal (or any enabled client-defined user role).

- A single reviewer user can belong to more than one reviewer group, if he or she has multiple roles (evaluating multiple kinds of applications) within your evaluation process.
- Because a single reviewer user can belong to more than one reviewer group at a time, and because reviewer groups may have overlapping qualifications and opportunity assignments, it is possible that a single reviewer user may be assigned to review the same application twice.
- You may also assign applications to certain reviewer groups (or individual reviewer users) from the opportunity's Reviewers tab.

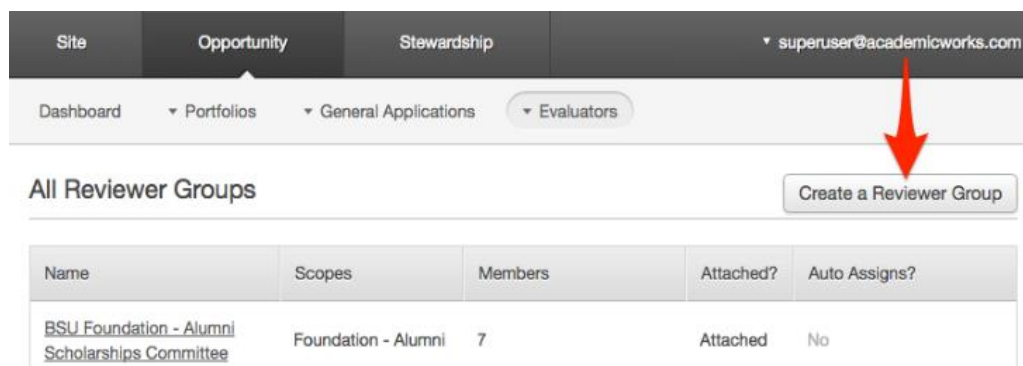
Reviewer Groups allow you to determine:

- Which **reviewers** should be working together,
- Which **opportunities** they should be working on,
- Which **applications** they should be focusing upon,
- And what **kinds of scoring rubrics or questions** they should use to evaluate applications

1. Under the Evaluators button, click on "Groups." This will open up a page displaying all currently available reviewer groups.



2. Next click on the "Create a Reviewer Group" button.



3. Provide your group with a name. You may also provide a description in the Group Information section if you like (NOTE: the name and description will *NOT* be visible to the reviewers).

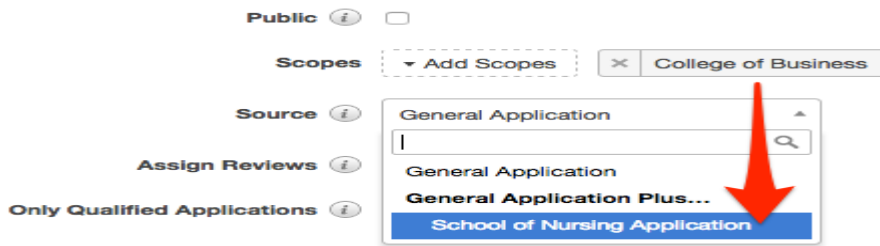
4. **Public:** If you would like other administrators (outside of your scope) to be able to assign this reviewer group to their opportunities, simply check the Public box. Otherwise, leave it unchecked to create a reviewer group that only users in the assigned scopes can manage.

5. **Scopes:** If you do not plan to make your reviewer group public, it is recommended that you also add your reviewer group to one or more scopes. This will ensure that other users will be able to access and manage the reviewer group.

- To add a new scope, click on the "Add a Scope" drop-down menu and choose the appropriate scope.

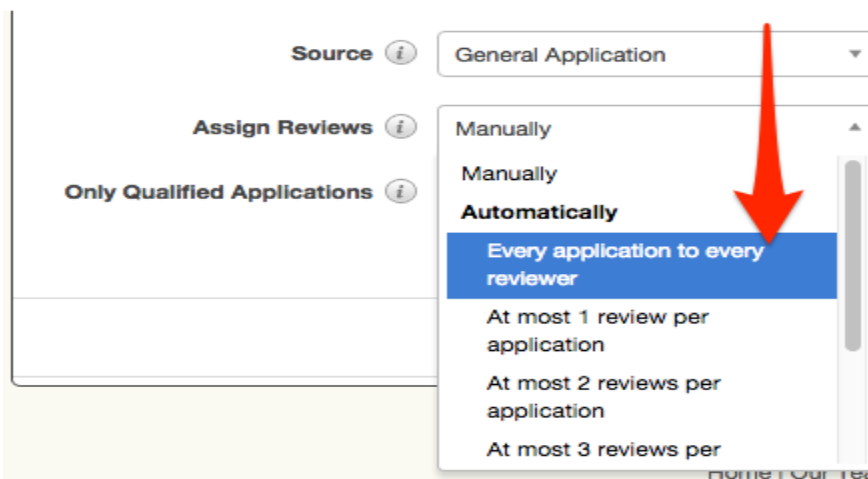
6. **Source:** If you currently have access to at least one Conditional Application in your system, you will also be able to select a source.

- *General Application* - The reviewer group may evaluate opportunities not associated with any Conditional Applications. The group may also evaluate General Applications.
- *Conditional Applications* - By selecting a Conditional Application for the group's source, administrators will permit the group to evaluate any opportunities also associated with the same Conditional Application. The group may also evaluate those Conditional Applications.

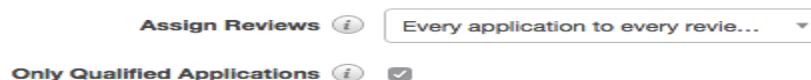


7. Assign Reviews: This drop-down menu allows administrators to determine how applications should be assigned to reviewers.

- *Manually* - Administrators will be able to manually select individual applications to be assigned to individual reviewers. (Please note: as the number of applications increases, this can be a very labor-intensive setting.)
- *Automatically Assign Every Application to Every Reviewer* - All applications will be automatically assigned to all reviewers within the group.
- *Automatically Assign at Most 1 Review Per Application* - Each application will be automatically assigned to one reviewer.
- *Automatically Assign at Most 2 Reviews Per Application* - Each application will be automatically assigned to two reviewers.
- And so on up to 5 reviews.



8. Only Qualified Applications: If you would like the reviewer group to only be assigned qualified applications (that is, applications which have received at least 1 qualification point), check the box beside Only Qualified Applications. This setting also ensures that **only Submitted** applications (not Drafted) reach your reviewers.



9. Click the "Create Group" button to finish creating your group.



Customizing and Maintaining Reviewer Groups

Once you have successfully created at least one reviewer group, you are able to create unique configurations that determine what kinds of applications and evaluations this group of reviewers will encounter.

Whenever you create a new reviewer group and click on the "Create Group" button, the group will automatically open up to allow you to set these configurations. Otherwise, you can configure other existing reviewer groups by navigating to your Groups page and clicking on the name of a desired group.

The screenshot shows the 'All Reviewer Groups' page in the AcademicWorks system. The top navigation bar includes 'Site', 'Opportunity', and 'Stewardship'. The 'Opportunity' tab is active. Below the navigation bar, there are tabs for 'Dashboard', 'Portfolios', 'General Applications', and 'Evaluators'. The 'Evaluators' tab is selected, and a dropdown menu is open showing 'All' and 'Groups' options. A red arrow points to the 'Groups' option. The main content area displays a table of reviewer groups. The table has columns for 'Name', 'Members', 'Attached?', and 'Auto Assigns?'. The groups listed are: 'College of Business Scholarship Committee' (5 members, Attached), 'General Scholarship Committee' (12 members, Detached), 'Initial Review Committee' (3 members, Detached), 'Success Scholarship' (6 members, Detached), 'The Ernest S. Biczak, MD '77, Endowed Scholarship' (11 members, Attached), and 'The Paul A. Bergh, MD '83, and Catherine M. Bergh Scholarship' (7 members, Attached). A red arrow points to the 'Initial Review Committee' group.

Name	Members	Attached?	Auto Assigns?
College of Business Scholarship Committee	5	Attached	Yes
General Scholarship Committee	12	Detached	Yes
Initial Review Committee	3	Detached	Yes
Success Scholarship	6	Detached	Yes
The Ernest S. Biczak, MD '77, Endowed Scholarship	11	Attached	Yes
The Paul A. Bergh, MD '83, and Catherine M. Bergh Scholarship	7	Attached	Yes

Sections:

1. The Reviewer Group Template: Attached Versus Detached
2. The Details Tab
3. The Reviewers Tab
4. The Qualifications Tab
5. The Questions Tab
6. The Rubrics Tab
7. The Opportunities Tab

1. The Reviewer Group Template: Attached Versus Detached

Whenever a new reviewer group is created in AcademicWorks, it is always attached to the system's Reviewer Group Template by default. This template provides basic settings (set by Site Administrators) to serve as a standard or starting point for all new reviewer groups. The first decision in customizing a reviewer group is to determine if it should be attached or detached from the template.

- **ATTACHED:** Receives default Reviewer Note, questions, and rubrics from the Reviewer Group Template.
- **DETACHED:** May be uniquely configured to display customized Reviewer Note, questions, and/or rubrics.

To detach a reviewer group from the Reviewer Group Template, navigate to the group's "Details" tab and click on the "Detach Now" button. *Note: Once a group is detached, it can never be re-attached to the Reviewer Group Template.*

The screenshot displays the 'Details' tab for a reviewer group named 'The Paul A. Bergh, MD '83, and Catherine M. Bergh Scholarship Committee'. The interface includes a top navigation bar with tabs: 'Details' (selected), 'Reviewers', 'Qualifications', 'Questions', 'Rubrics', and 'Opportunities'. Below the navigation bar, the group name is shown with a status indicator 'Attached' and a warning icon. To the right of the group name are buttons for 'Detach Now' and 'History'. The 'Group Information' section contains a text area with the name and a description 'Group of alumni donors.' Below this is a 'Reviewer Note' section with the text 'There are no reviewer notes on the reviewer group template.'

2. The Details Tab

This tab allows you to configure the most basic aspects of the reviewer group, including:

- **Name** (not seen by reviewers)
- **Group Information** (not seen by reviewers)
- **Reviewer Note** (instructions to reviewers in this group)

The Reviewer Note will be seen by your reviewers at the top of each scoring rubric while completing their evaluations. This may be a good location to provide instructions about proper evaluation of applications (ex: "Students who provide more than two letters of reference should automatically receive a 3 for the Commendations and References area.")

The screenshot shows the 'Details' tab for a reviewer group. The group name is 'The Paul A. Bergh, MD '83, and Catherine M. Bergh Scholarship Committee'. Below the name is a 'Name' field. There are two text editors: 'Group Information' and 'Reviewer Note'. The 'Reviewer Note' contains a sample message: 'Thank you for taking the time to assist with our scholarship selection process! Please contact Jane Smith at 888-123-4567 in the Foundation Office with any questions.' Both editors have formatting tools (B, I, U, L) and buttons for Help, Preview, and Edit. A 'History' button is in the top right.

- **Public** - Selecting public will allow other administrators not in your scope to assign applications to this group.
- **Scopes** - If you do not make your reviewer group Public, it is recommended that you add one or more scopes so that other administrators can manage and assign applications to reviewers in the group. For more information on Scopes, Site Administrators can visit "[Creating, Editing, and Maintaining Scopes](#)."
- **Assign Reviews** - Determines whether or not the system will automatically generate application assignments and, if so, how many reviewers will be assigned to each application.
- **Source** - If your system uses a Conditional Application, the reviewer group's source determines whether or not the group will be able to evaluate applications associated with the Conditional Application.
- **Only Qualified Applications** - If selected, applications in an application category that is not visible to reviewers or are unqualified applications (with 0 qualification points) will not be available to assign to reviewers.

The screenshot shows the configuration options for the reviewer group. It includes a 'Public' checkbox, a 'Scopes' dropdown menu with 'Foundation - Alumni' selected, a 'Source' dropdown menu with 'General Application' selected, an 'Assign Reviews' dropdown menu with 'Every application to every review...' selected, and an 'Only Qualified Applications' checkbox which is checked.

3. The Reviewers Tab

This tab allows you to select which individuals you would like to participate in this reviewer group.

- **Current Reviewers:** Displays all users who are currently members of the reviewer group. Use the drop-down menu beside any reviewer to designate them as a Chair for the group or to remove them from the group (None). Be sure to click the green "Update Reviewers" button when finished. You can also view information about their reviewer assignments, including:

Locked? - Typically used after reviewing has already begun, this setting allows administrators to prevent any additional applications from being assigned to the reviewer. Additionally, any reviews not yet submitted by the reviewer will be re-distributed evenly amongst all other remaining reviewers in the group (who are not also locked.)

Reviewed / Assigned - This Group - The number of reviewed applications the reviewer has submitted (finalized) / out of the number of applications they have been assigned. In other words, how much work they have completed out of the total amount of work visible to them *through the reviewer group*.

Reviewed / Assigned - All Groups - Similarly, the number of application reviews submitted / out of the total assigned to the reviewer *through all of your system's reviewer groups* (their grand total completed / total overall assignment count).

- **All System Reviewers:** Displays all other users who are designated as reviewers in your AcademicWorks system, as well as their system-wide Reviewed / Eligible for Review amounts. To add a new reviewer to the reviewer group from this list, use the drop-down menu to select Member or Chair. Click the green "Update Reviewers" button when finished.

BSU Foundation - Alumni Scholarships Committee

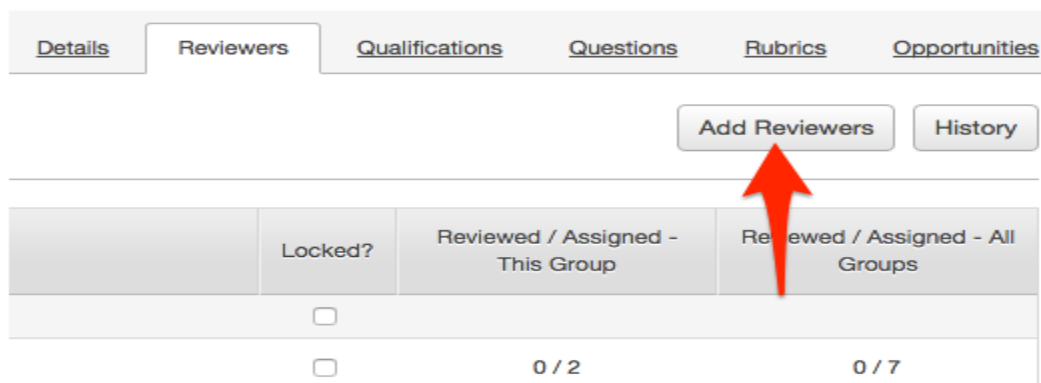
Attached

Workload in group Workload overall

Role	Name	Locked?	Reviewed / Assigned - This Group	Reviewed / Assigned - All Groups
Current Reviewers				
Chair	Cammy Jagielski	<input type="checkbox"/>	0 / 2	0 / 7
Member	Jane Erickson	<input type="checkbox"/>	0 / 1	0 / 6
Member	John Doe	<input type="checkbox"/>	0 / 2	0 / 40
Member	Matt Frank	<input type="checkbox"/>	0 / 1	0 / 11
Member	Nadine Jimenez	<input type="checkbox"/>	6 / 6	11 / 11
Member	Sam Smith	<input type="checkbox"/>	0 / 2	0 / 12
Member	Seth Morgan	<input type="checkbox"/>	6 / 6	16 / 43
All System Reviewers				
None	Audrey Taylor	—	—	3 / 32
None	Beth Hernandez	—	—	1 / 32
None	Jonathan Stewart	—	—	8 / 5

Update Reviewers

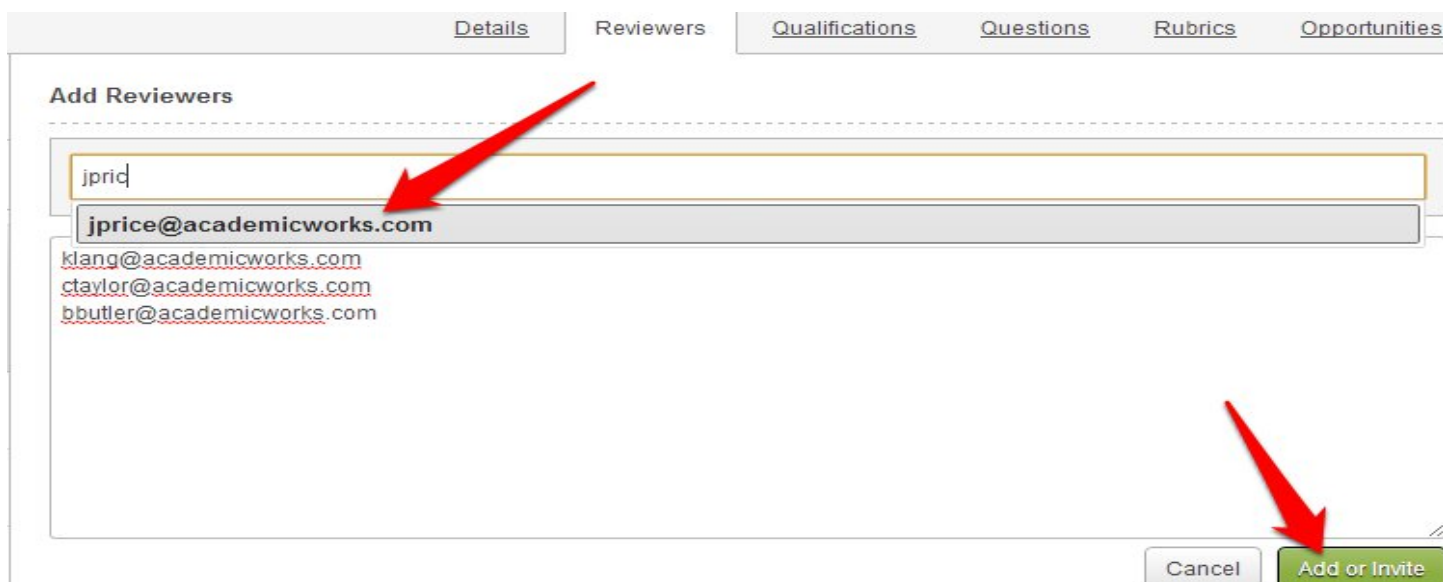
- **Adding an Individual Who is Not Yet a Reviewer:** If you know of an individual you would like to add as a reviewer to this reviewer group, but they are not yet listed as a reviewer in your AcademicWorks system (or perhaps are not yet a user in your AcademicWorks system) you may also include these individuals from this page. Simply click on the Add Reviewers button to get started.



The screenshot shows the 'Reviewers' tab of the AcademicWorks interface. At the top, there are tabs for 'Details', 'Reviewers', 'Qualifications', 'Questions', 'Rubrics', and 'Opportunities'. Below these tabs are two buttons: 'Add Reviewers' and 'History'. A red arrow points to the 'Add Reviewers' button. Below the buttons is a table with the following columns: 'Locked?', 'Reviewed / Assigned - This Group', and 'Reviewed / Assigned - All Groups'. The table has two rows of data, each with a checkbox in the 'Locked?' column and counts in the other two columns.

Locked?	Reviewed / Assigned - This Group	Reviewed / Assigned - All Groups
<input type="checkbox"/>		
<input type="checkbox"/>	0 / 2	0 / 7

From here, you may use the search bar to locate and add existing users in your AcademicWorks system. Alternatively, you may type in the email address of an individual who is not yet a user in your AcademicWorks system. (These users will receive the Reviewer email communication alerting them to this assignment, but not immediately. This email will be sent in a digest at 3 AM CST on the Begin Review Period date for the appropriate opportunities assigned to the group.) For either approach, the user added will be included in the list of reviewers found in the Reviewer Group Template and will appear in the All System Reviewers list on all future reviewer groups. When finished, click on the green "Add or Invite" button.



The screenshot shows the 'Add Reviewers' dialog box. At the top, there are tabs for 'Details', 'Reviewers', 'Qualifications', 'Questions', 'Rubrics', and 'Opportunities'. Below these tabs is a section titled 'Add Reviewers'. Inside this section is a search bar with the text 'jpricd'. Below the search bar is a dropdown list with the email address 'jprice@academicworks.com' selected. Below the dropdown list are three more email addresses: 'klang@academicworks.com', 'ctaylor@academicworks.com', and 'bbutler@academicworks.com'. At the bottom right of the dialog box are two buttons: 'Cancel' and 'Add or Invite'. A red arrow points to the 'Add or Invite' button.

4. The Qualifications Tab

Adding qualifications to a reviewer group is optional. This tab allows you to select specific qualifications for the applications that you would like this group of reviewers to interact with in your system. Much like qualifications criteria are established in your system's opportunities, qualifications of applications that should be directed toward this reviewer group can be established through a drop-down menu. For example, the picture below depicts setting a qualification criterion that the College of Education Committee only view applications from students who are Education majors.

Please Note: It is **NOT** necessary to re-create the qualifications from an opportunity in the reviewer group's qualifications tab!

This is merely providing you with an optional **second layer of filtering**. (For example, if you assigned the reviewer group to view applications from a specific opportunity -- *but* you wanted these reviewers to only view applications from students *from a particular high school or major*, then you could use the reviewer group's qualifications to say that within the applications received for an opportunity, this particular group should only view applications meeting an additional criterion.) If you have any questions about reviewer group qualifications, please contact Karima Karim at karima.karim@csueastbay.edu

The screenshot displays the 'Qualifications' tab within a web application. The top navigation bar includes 'Site', 'Opportunity', and 'Stewardship'. Below it, a sub-navigation bar shows 'Dashboard', 'Portfolios', 'General Applications', and 'Evaluators'. The main content area is titled 'The Paul A. Bergh, MD '83, and Catherine M. Bergh Scholarship' and includes a 'History' button. The 'Qualifications for Review Creation' section is active, showing a search bar with 'Academic College (multi)' selected and 'must include' as the filter. A dropdown menu lists colleges: 'College of Business', 'College of Education' (highlighted), 'College of Engineering', 'College of Humanities and Social Sciences', and 'College of Science and Mathematics'. The 'Add' button is highlighted with a red arrow. The 'Save Qualifiers' button is at the bottom right.

5. The Questions Tab

This tab allows you to determine any questions your reviewer group should encounter and/or respond to in order to evaluate an application. If your reviewer group is detached from the Reviewer Group Template (see "The Details Tab" section above), you may remove existing questions or add additional new questions using the Add Reviewer Question button. You may also choose to make questions required, or rearrange them as needed using the gray bars beside each question.

The screenshot shows the 'Questions' tab for 'The Paul A. Bergh, MD '83, and Catherine M. Bergh Scholarship'. The interface includes a top navigation bar with 'Site', 'Opportunity', and 'Stewardship' tabs, and a user profile 'superuser@academicworks.com'. Below this is a breadcrumb trail: 'Dashboard > Portfolios > General Applications > Evaluators'. The 'Questions' tab is selected, with other tabs like 'Details', 'Reviewers', 'Qualifications', 'Rubrics', and 'Opportunities' visible. A blue question mark icon and buttons for 'Add Reviewer Question' and 'History' are present. The 'Asked Questions' section contains a table with two entries:

Order	Label	Field	Required?	Type	Actions
≡	Is the person a finalist?	10053	<input type="checkbox"/>	Radio Buttons	Details ✕
≡	Reviewer Notes	10039	<input type="checkbox"/>	Essay	Details ✕

At the bottom right, there is a green 'Update Questions' button. Red arrows point to the 'Questions' tab and the 'Update Questions' button.

6. The Rubrics Tab

This tab allows you to set up a series of scoring rubrics that reviewers in your reviewer group will encounter when evaluating assigned applications. If your reviewer group is detached from the Reviewer Group Template (see The Details Tab section above), you may create new rubrics or edit existing rubrics. To create a new rubric, simply fill in the Name, Minimum and Maximum scores, the Offset (increments between possible scores), and the Weight (multiplication factor), and click on the green Create Rubric button

The screenshot shows the 'Rubrics' tab for 'The Paul A. Bergh, MD '83, and Catherine M. Bergh Scholarship'. The interface is similar to the previous one, with the 'Rubrics' tab selected. Below the header, there is a 'New Rubric' section with the following fields:


- Name:
- Min Score:
- Max Score:
- Offset:
- Weight:

At the bottom right, there is a green 'Create Rubric' button. A red arrow points to the 'Rubrics' tab, and another red arrow points to the 'Create Rubric' button.

To disable or adjust an existing scoring rubric:

1. Click on "Edit" beside the desired rubric


Current Rubrics

Name	Min Score	Max Score	Offset	Weight	Actions
Give an overall rating of this application.	0.0	10.0	1.0	1.0	

2. On the next screen, you may adjust the Name, Minimum and Maximum scores, the Offset (increments between possible scores), or the Weight (multiplication factor).

3. You may also deselect box beside "Enabled" to disable this rubric for reviewers in this reviewer group.

Edit Rubric

Name	<input type="text" value="Give an overall rating of this application."/>
Min Score	<input type="text" value="0"/>
Max Score	<input type="text" value="10"/>
Offset	<input type="text" value="1"/>
Weight	<input type="text" value="1"/>
 Enabled	<input checked="" type="checkbox"/>

Update Rubric

NOTE: Because it is possible that different Reviewer Groups may evaluate applications for the same opportunity using extremely different scoring rubrics, all reviewer scores in the AcademicWorks system are **converted to a 100-point scale** when displayed in the Opportunity Administrator or Reviewer Chair portal.


7. The Opportunities Tab

This tab allows you to determine which applications you would like this reviewer group to encounter on an opportunity-by-opportunity basis. This page displays a list of all current opportunities in your AcademicWorks system, as well as the Review Period, total number of applications received for the opportunity, and any additional assigned reviewer groups working on applications for that opportunity. (Hover over the number below Assigned Reviewer Groups to view this information.)

To select a desired opportunity, simply click the check box beside the opportunity's name. You may select as many opportunities as you wish.

NOTE: You must assign at least one opportunity (or the General Application or a Conditional Application) to begin matching applications to the reviewer group. If you do not select anything under the Opportunities tab, no applications will be directed toward the group, despite any qualifications you have established.

[Details](#) [Reviewers](#) [Qualifications](#) [Questions](#) [Rubrics](#) [Opportunities](#)

 **General Scholarship Committee**
Detached

[History](#)

Opportunities for Group Assignments

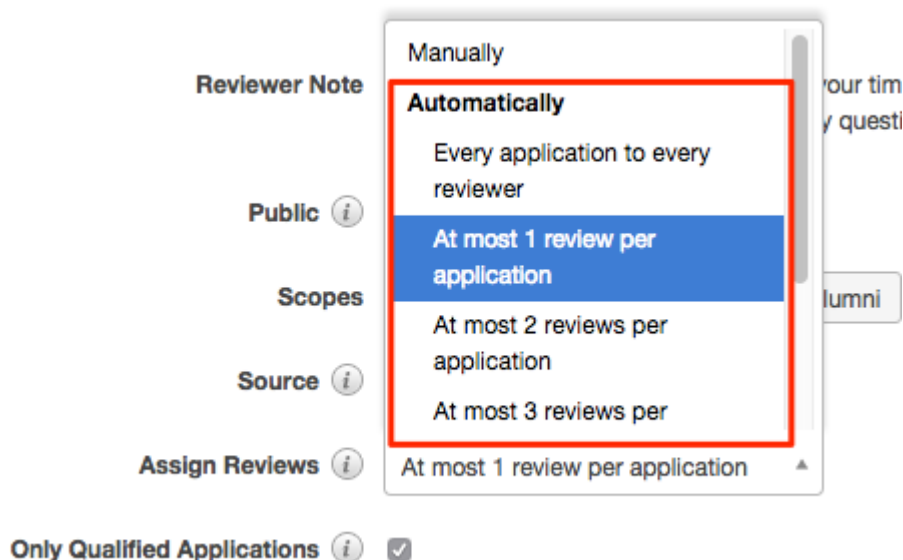
Assigned	Name	Review Period	Applications	Assigned Reviewer Groups
<input type="checkbox"/>	General Application	08/08/2013 - Archival	27	1
<input type="checkbox"/>	A Scholarship From the Winston Churchill Foundation	Reviewed As Assigned	0	None
<input type="checkbox"/>	A Cola Scholarship	Reviewed As Assigned		General Scholarship Committee (5)
<input checked="" type="checkbox"/>	Hammermill International Scholarship	07/02/2013 - Archival	9	1
<input type="checkbox"/>	Success Scholarship	Reviewed As Assigned	10	1
<input type="checkbox"/>	Success Scholarship	Reviewed As Assigned	0	None
<input type="checkbox"/>	Temple-Inland Scholarship Fund	08/16/2011 - Archival	13	2
<input checked="" type="checkbox"/>	The Ernest S. Biczak, MD '77, Endowed Scholarship	07/15/2013 - Archival	19	1
<input type="checkbox"/>	The Gates Millennium Scholars	Reviewed As Assigned	0	None
<input checked="" type="checkbox"/>	The Paul A. Bergh, MD '83, and Catherine M. Bergh Scholarship	07/15/2013 - 05/14/2014	19	1

[Update Assignments](#)

How to Manually Assign Applications to Reviewers

The AcademicWorks system offers two approaches to assign applications to reviewers. Administrators should think carefully about which type of assignments will function best for their unique process.

Automatically Assign - If a reviewer group is set to automatically assign applications, any applications for the assigned opportunities (or General Application or Conditional Applications) will be automatically assigned to reviewers within the group. (This can be further filtered using the Only Qualified Applications setting or reviewer group qualification criteria.) This option is ideal for situations requiring a quick set-up and little attention to which applications reviewers receive.



Manually Assign - If a reviewer group is set to manually assign applications, administrators will be able to manually select each application (or General Application or Conditional Application) that each individual member of the reviewer group should evaluate. This option is ideal for situations where reviewers must receive specific applications or a specific number of assignments.

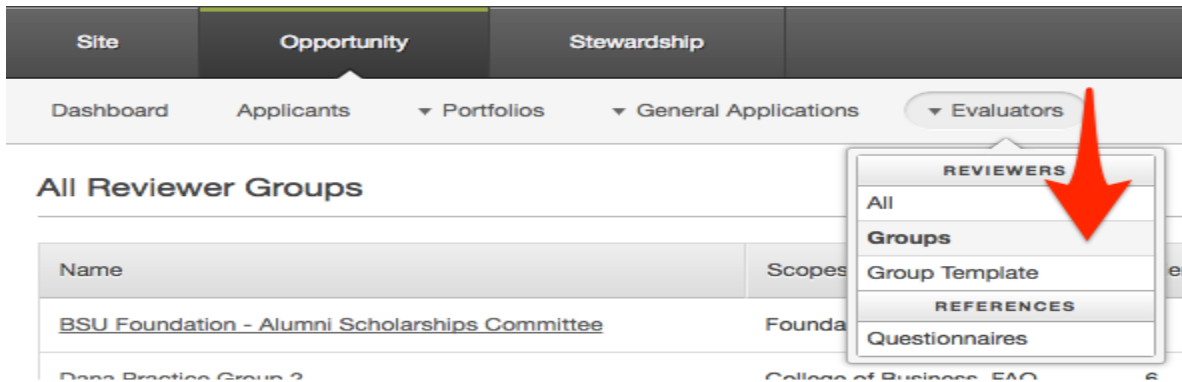
This section outlines how to set a reviewer group to manually assign applications and then select application assignments for each reviewer.

1. Permitting Manual Application Assignments
2. Manually Assigning Opportunity Applications to Reviewers
3. Manually Assigning General Applications to Reviewers
4. Manually Assigning Applications to Reviewers in Bulk
5. Why Are There Applications I Cannot Select or Deselect?

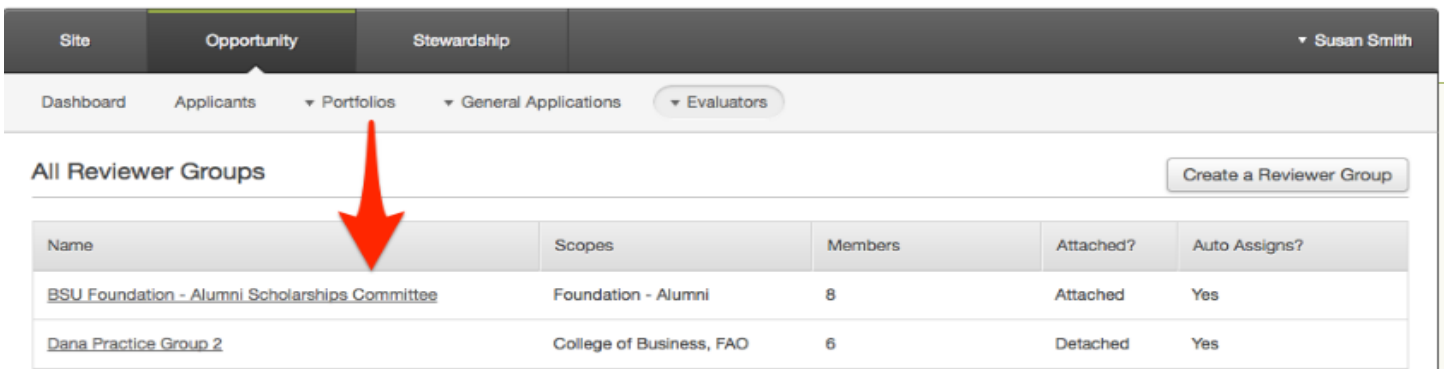
1. Permitting Manual Application Assignments

The first step in manually assigning applications to reviewers is to ensure the group the reviewer belongs to is not set to automatically create the assignments. To do so:

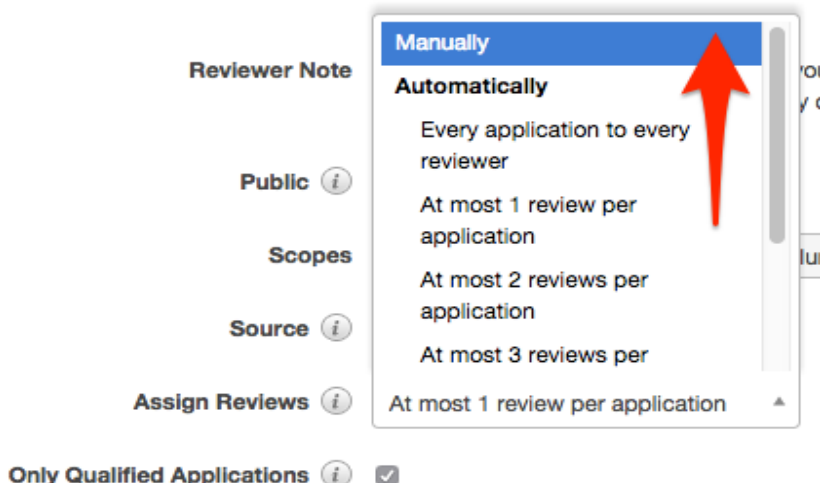
1. Navigate to the Opportunity tab then the Evaluators menu's Groups page.



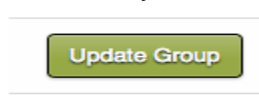
2. Click into the intended reviewer group.



3. On the group's Details tab, locate the Assign Reviews setting near the bottom of the page. Ensure that **Manually** is selected. *Optional: If you would like to avoid assigning unqualified applications (those without at least one qualification point or those that remain at the Drafted category), you may leave the Only Qualified Applications setting turned on.*



- Click on the green Update button if necessary to save any changes.



- Finally, click into the reviewer group's Opportunities Tab. Ensure that all desired opportunities (or the General Application or a Conditional Application) are selected.

Details Reviewers Qualifications Questions Rubrics Opportunities				
Opportunities for Group Assignments				
Assigned	Name	Review Period	Applications	Assigned Reviewer Groups
General				
<input type="checkbox"/>	General Application	01/18/2015 - 03/31/2017	26	3
Initial				
<input checked="" type="checkbox"/>	BSU Alumni Association Scholarship	02/25/2016 - 03/14/2018	9	3
<input checked="" type="checkbox"/>	Frank Black's Education Scholarship	05/01/2017 - 05/31/2017	12	1
<input type="checkbox"/>	BSU Spirit Award	01/19/2015 - 01/19/2018	3	1
<input type="checkbox"/>	College of Education Award	01/19/2015 - 01/19/2016	1	None

2. Manually Assigning Opportunity Applications to Specific Reviewers

Opportunity applications can be manually assigned to reviewers by going into any assigned opportunity. To do so:

- Navigate to the Portfolios Menu's All page and click into the intended opportunity.

The screenshot shows a web application interface. At the top, there is a navigation bar with tabs: "Site", "Opportunity", and "Stewardship". Below this, there is a sub-navigation bar with links: "Dashboard", "Applications", "Portfolios", "General Applications", and "Evaluators". A red arrow points to the "Portfolios" link. Below the navigation bar, there is a search bar with the text "Search by Keyword" and a "Search" button. A dropdown menu is open from the "Portfolios" link, showing options: "All", "Create New", "REPORTS", "Encumbered Funds", "Fund Disbursements", "Opportunities", "BULK ACTIONS", "Auto-Match Applications", "Apply-To Applications", "Post-Acceptance Applications", and "Renewal Applications". Below the dropdown, there is a table of opportunities. The table has columns for "Opportunity", "Status", and "Applications". The first row is "BSU Alumni Association", "Published", "10009385 Donor: None Given". The second row is "Spring 2017 Renewal", "Imported Questions", "Deadline: No Date Given 6 Applications". The third row is "Spring 2016 Renewal", "Imported Questions", "Deadline: No Date Given 3 Applications". The fourth row is "Spring 2015 Renewal", "Published", "Deadline: No Date Given 0 Applications". The fifth row is "Winter 2015 Apply-To", "Ended", "3 Questions • 1 Qualification Group", "Deadline: 01/01/2016 9 Applications". A red arrow points to the "Winter 2015 Apply-To" row.

2. Navigate to the opportunity's Reviews tab. This tab should contain a list of reviewers assigned to evaluate applications for that opportunity. To assign applications to any reviewer in the list, click into the green Assignments button.

BSU Alumni Association Scholarship
▼ Winter 2015 | Ended 431 days ago

Details Questions Qualifications Applications **▼ Reviews** Communications ▼ Post-Acceptance

Notes History

Assigned Reviewers

Name	Groups	Reviewed / Assigned	Actions
Sally Morganson	Dana Practice Group 2	0 / 2	Assignments
Cammy Jagielski	Dana Practice Group 2, BSU Foundation - Alumni Scholarships Committee	0 / 2	Assignments
John Doe	Dana's Test Group, BSU Foundation - Alumni Scholarships Committee	0 / 0	Assignments
Nadine Jimenez	Dana's Test Group, BSU Foundation - Alumni Scholarships Committee	6 / 6	Assignments

3. On the next page, be sure that you are on the Manual Assignments tab where you should see a list of available applications that may be manually assigned to the reviewer. Click the checkboxes beside any applications you would like this reviewer to evaluate. Click the green Assign button when finished.

Please note: If the Only Qualified Applications setting is turned on, certain applications may not be available. Additionally, qualification criteria added to the reviewer group may also filter available applications.

BSU ALUMNI ASSOCIATION SCHOLARSHIP > WINTER 2015 > REVIEWERS > CAMMY JAGIELSKI

BSU Alumni Association Scholarship
▼ Winter 2015 | Ended 431 days ago

Notes History

Cammy Jagielski

[Select Applicants](#) [Manual Assignments](#) [Auto Assignments](#)

Assigned?	Name	Group	Normalized Score	Review Status
<input type="checkbox"/>	Lauren Longham	BSU Foundation - Alumni Scholarships Committee	No Score Yet	Not Yet Assigned
<input type="checkbox"/>	Emily Engleside	BSU Foundation - Alumni Scholarships Committee	No Score Yet	Not Yet Assigned
<input type="checkbox"/>	Nelson Northcutt	BSU Foundation - Alumni Scholarships Committee	No Score Yet	Not Yet Assigned
<input type="checkbox"/>	Yvonne Yager	BSU Foundation - Alumni Scholarships Committee	No Score Yet	Not Yet Assigned
<input type="checkbox"/>	Whitney Williamson	BSU Foundation - Alumni Scholarships Committee	No Score Yet	Not Yet Assigned
<input type="checkbox"/>	Quinn Quill	BSU Foundation - Alumni Scholarships Committee	No Score Yet	Not Yet Assigned

[Select All](#) [Assign Selected](#)

4. In the case where there are more applicants than fit on one page, then you will need to advance to any subsequent pages to make assignments there as well.

Search reviews for Cammy Jagielski by name, email address, or user id... [Search](#) [Page 1](#) [Previous](#) [Next](#)

[Manual Assignments](#) [Auto Assignments](#)

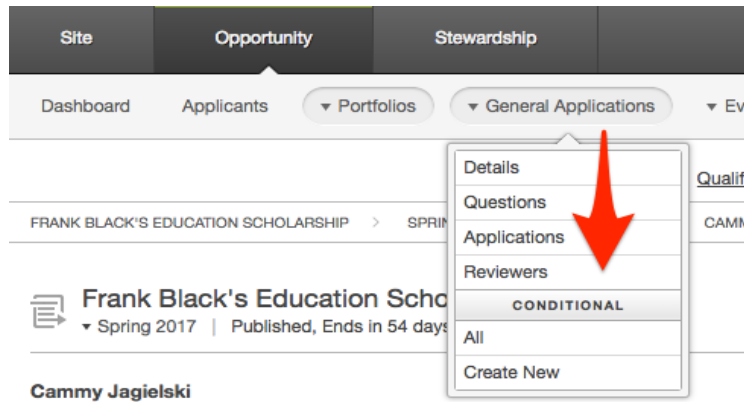
Assigned?	Name	Group	Normalized Score	Review Status
<input type="checkbox"/>	Chris Carlsson	BSU Foundation - Alumni Scholarships Committee	No Score Yet	Not Yet Assigned
<input type="checkbox"/>	Whitney Williamson	BSU Foundation - Alumni Scholarships Committee	No Score Yet	Not Yet Assigned

5. Repeat steps two and three to continue manually assigning applications to additional reviewers.

3. Manually Assigning General Applications to Reviewers

Due to the quantity of General Applications in any AcademicWorks system, Customer Support recommends that System Administrators primarily consider automatically assigning General Applications to reviewing committees. If Auto-Assign will not accomplish reviewer assignments as needed, System Administrators may manually assign applications to reviewers. To do so:

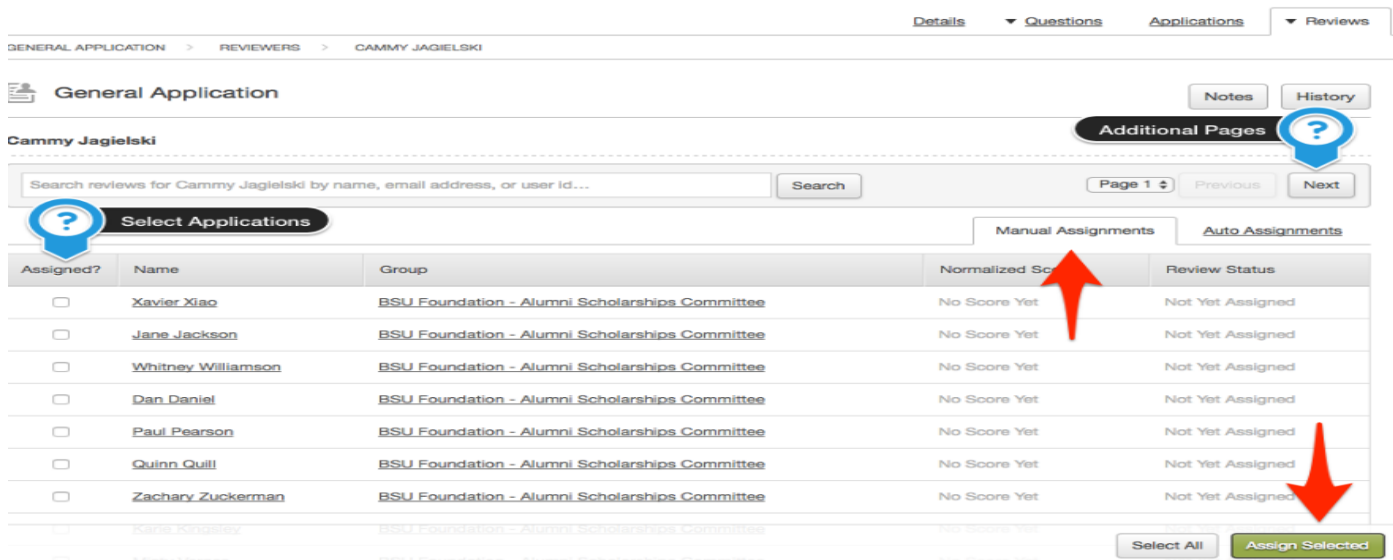
1. Navigate to the General Application menu's Reviewers page



2. This tab should contain a list of reviewers assigned to evaluate applications for that opportunity. To assign applications to any reviewer in the list, click into the green Assignments button.

3. On the next page, click on the Manual Assignments tab and you should see a list of available applications that may be manually assigned to the reviewer. Click the checkboxes beside any applications you would like this reviewer to evaluate. Click the green Assign button when finished.

Please note: If the Only Qualified Applications setting is turned on, Drafted General Applications may not be available. Additionally, qualification criteria added to the reviewer group may also filter available General Applications.



4. Repeat steps two and three to continue manually assigning applications.

4. Manually Assigning Applications to Reviewers in Bulk

Applications can also be manually assigned in bulk from the General, Conditional, or Opportunity Applications grids as long as they are associated with a group that is set to manual assignment. When assigning in bulk, all selected applications are assigned to all members of the group.

1. To assign in bulk, navigate to the desired application grid and select the applications to be assigned, scroll down to the "Act on Selected" button and choose Assign to Reviewer Groups.

The screenshot shows a table of applications with the following columns: **Select Assignments**, **Applied On**, **Primary Email**, **Email Aliases**, **Name**, **Reviewer...**, **Assigned...**, **Complete...**, **Encumbe...**, and **En...**. The table contains 10 rows of application data. A red arrow points to the **Act on Selected** button located at the bottom left of the table.

The dropdown menu shows the following options: **Email Users**, **Apply**, **Assign To Reviewer Groups** (highlighted in blue), and **Act on Selected**.

2. Choose the group the applications should be assigned to from the drop down menu, and then click "Assign to Group".

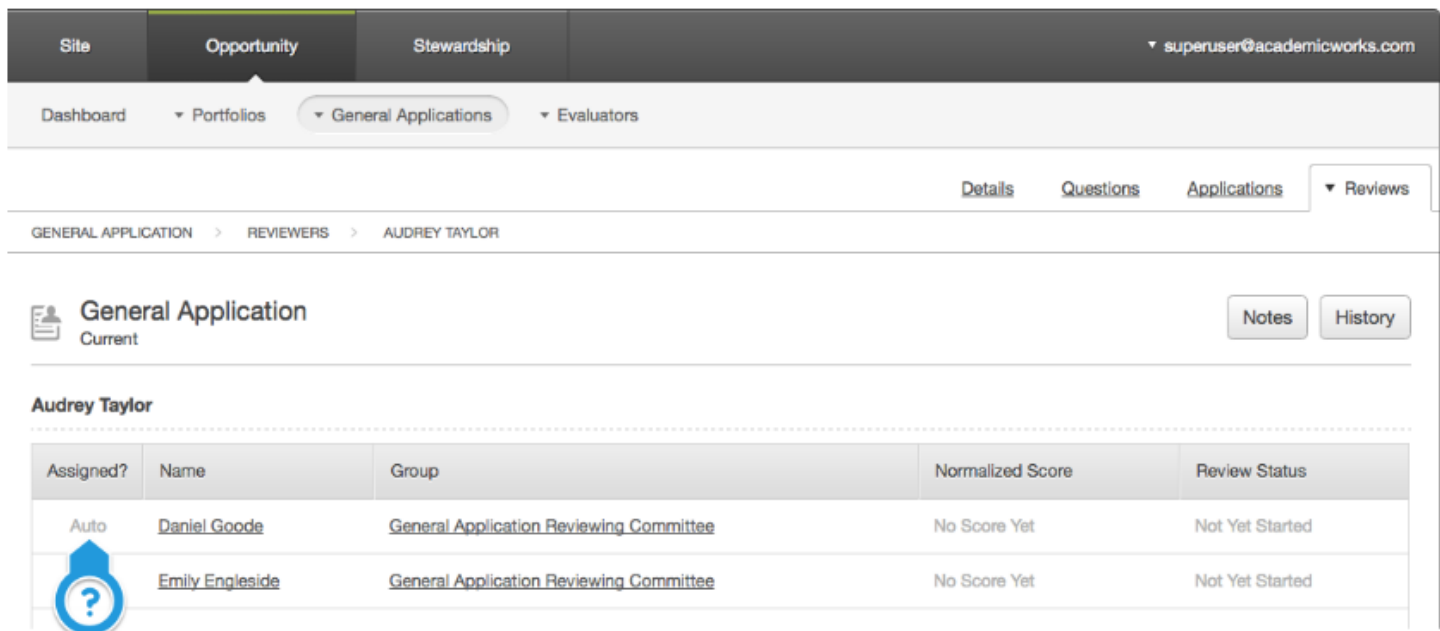
The dialog box is titled **Assign Selected to Groups** and has a **CLOSE X** button. It contains a **Choose a Group** section with a dropdown menu showing **FLCC Group** and a search bar. Below the dropdown, the **BSU Foundation - Alumni Scholarships Committee** is highlighted. A red arrow points to the **Assign to Group** button.

5. Why Are There Applications I Cannot Select or Deselect?

When creating manual application assignments, administrators may see applications that cannot be selected for manual assignment.

The application says Auto.

If you see the word Auto beside an application instead of a checkbox, it means that application has been automatically assigned to the reviewer. Please see the [Permitting Manual Application Assignments](#) area above for instructions on turning off the automatic assignments setting.



Site Opportunity Stewardship superuser@academicworks.com

Dashboard Portfolios General Applications Evaluators

Details Questions Applications Reviews

GENERAL APPLICATION > REVIEWERS > AUDREY TAYLOR

General Application
Current

Notes History

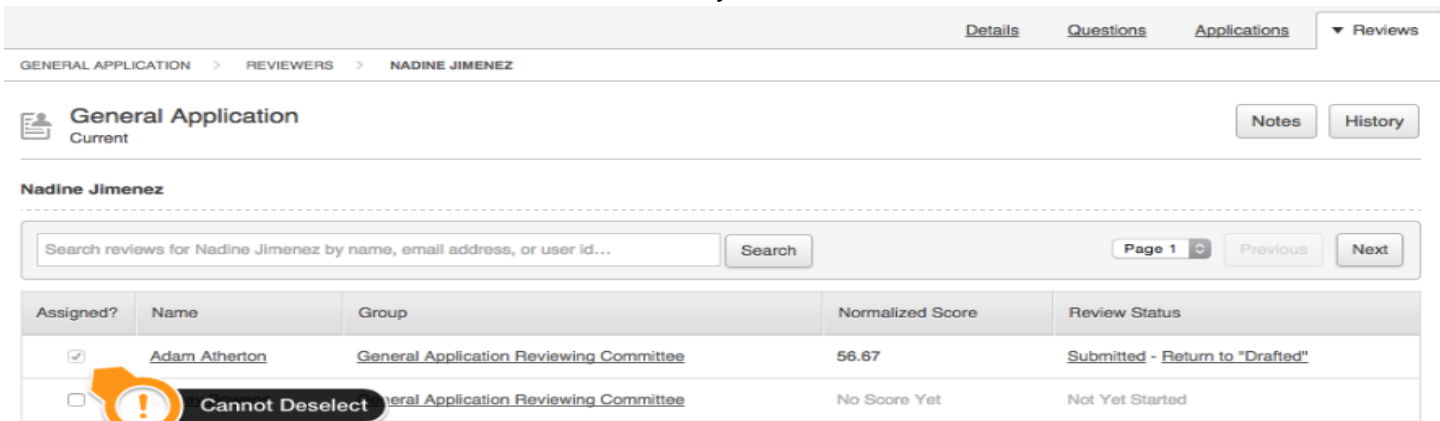
Audrey Taylor

Assigned?	Name	Group	Normalized Score	Review Status
Auto	Daniel Goode	General Application Reviewing Committee	No Score Yet	Not Yet Started
?	Emily Engleside	General Application Reviewing Committee	No Score Yet	Not Yet Started

The application is already checked and I cannot de-select it.

Typically, this means that the reviewer has already submitted their evaluation of the application. Once a reviewer has completed evaluating an applicant, AcademicWorks will preserve that assignment to maintain continuity for the reviewer (and so there's no risk the reviewer will lose his or her hard work!)

If you would like to deselect an application for which a review has already been submitted, please contact Karima Karim at karima.karim@csueastbay.edu for assistance.



Details Questions Applications Reviews

GENERAL APPLICATION > REVIEWERS > NADINE JIMENEZ

General Application
Current

Notes History

Nadine Jimenez

Search reviews for Nadine Jimenez by name, email address, or user id... Search Page 1 Previous Next

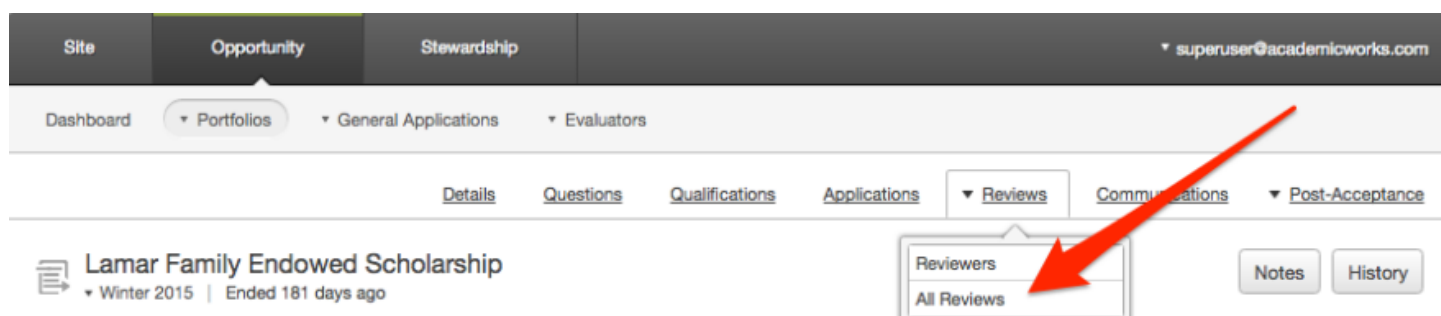
Assigned?	Name	Group	Normalized Score	Review Status
<input checked="" type="checkbox"/>	Adam Atherton	General Application Reviewing Committee	56.67	Submitted - Return to "Drafted"
<input type="checkbox"/>	Cannot Deselect	General Application Reviewing Committee	No Score Yet	Not Yet Started

Seeing and Working with Reviews Using the All Reviews Page

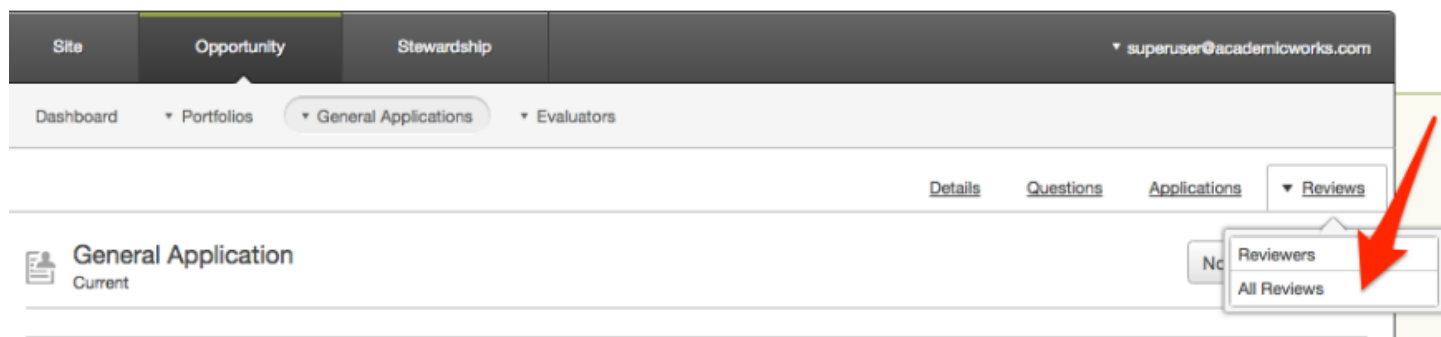
During the reviewing phase, administrators can monitor the progress and final decisions of all reviewers of the applications by going to the opportunity's "All Reviews" page. (There is also an All Reviews page for the General Application, located under the General Application's Reviews tab as well as for any Conditional Applications, located under the Conditional Application's Reviews tab.) This page can help administrators evaluate decisions across all applications, and allows for an exportable report of all Reviewer Notes and scores.

Locating the All Reviews Page

After reviewers have begun saving and submitting their application evaluations, system administrators may view and compare these evaluations at the opportunity level. To do so, administrators should navigate to the desired opportunity and then click on the "All Reviews" sub-tab (hidden beneath the "Reviews" tab):



Alternatively, system administrators conducting profile evaluations can also view and compare these evaluations at the General Application level. To do so, administrators should navigate to the General Application and then click on the "All Reviews" sub-tab (hidden beneath the "Reviews" tab):



What Information is Accessible on the All Reviews Grid?

The All Reviews page provides an overall perspective and comparison of all assigned evaluations of applications for the given opportunity (or General Applications). This includes:

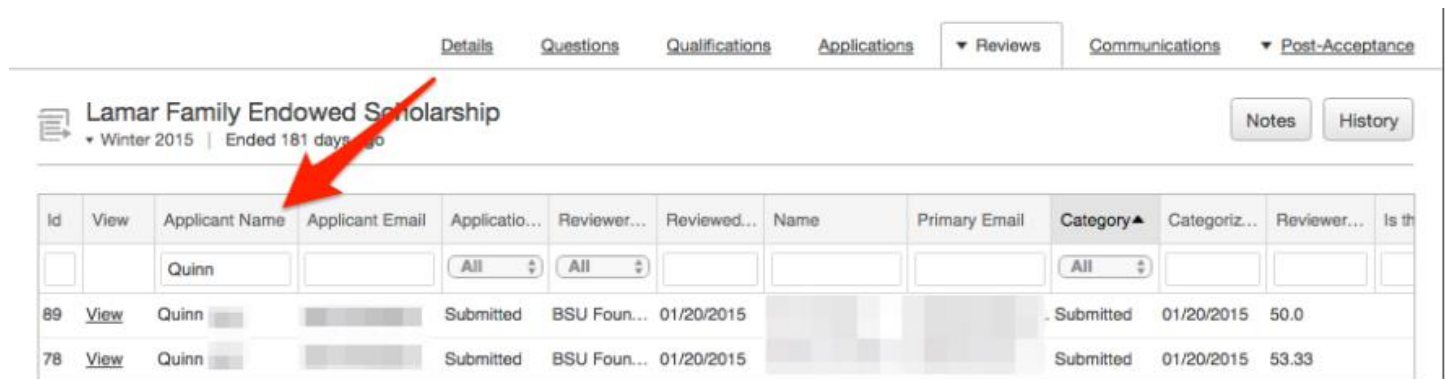
- The name and email address of the applicant. (At the opportunity level, the current category of the application is also visible.)
- The name and email address of the reviewer who is assigned to the application.
- The name of the Reviewer Group through which the evaluation was assigned.
- The status of the evaluation, as well as the date on which the evaluation was saved or submitted.

- A link to open up a specific evaluation.
- And most importantly, a listing of all saved or submitted **Reviewer Scores** (normalized); **Reviewer Notes**; and responses to additional **questions** asked of the reviewers (if any were included as part of the evaluation of the application.)

What Can Be Done with This Information?

Administrators may re-arrange, filter, or export this information as on any other grid view in the AcademicWorks system. There are many possible ways to work with the information in the All Reviews grid, but the three most common uses are:

1. **Compare evaluations of a single applicant:** Simply type in the name of an applicant into the Applicant Name search box to compare all saved or submitted evaluations of the particular applicant.



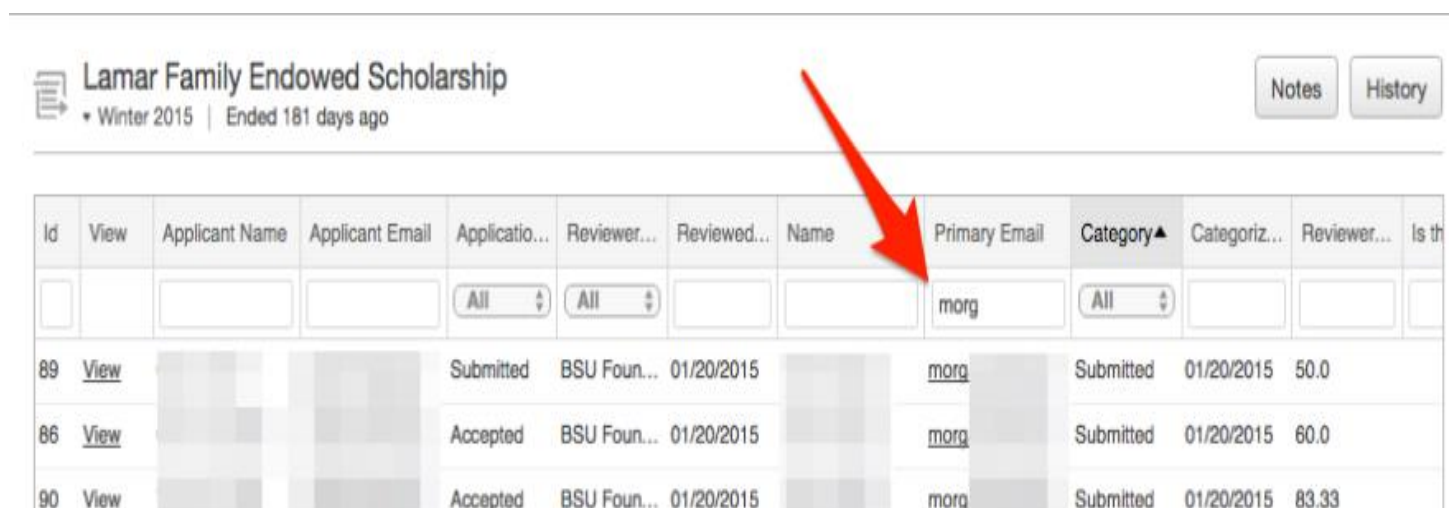
Details Questions Qualifications Applications **Reviews** Communications Post-Acceptance

Lamar Family Endowed Scholarship
Winter 2015 | Ended 181 days ago

Notes History

Id	View	Applicant Name	Applicant Email	Applicatio...	Reviewer...	Reviewed...	Name	Primary Email	Category▲	Categoriz...	Reviewer...	Is th
		Quinn		All	All				All			
89	View	Quinn		Submitted	BSU Foun...	01/20/2015			Submitted	01/20/2015	50.0	
78	View	Quinn		Submitted	BSU Foun...	01/20/2015			Submitted	01/20/2015	53.33	

2. **Compare all evaluations from a particular reviewer:** Simply type in the name or email address of a reviewer to compare all of their evaluations for the opportunity (or General Applications).



Lamar Family Endowed Scholarship
Winter 2015 | Ended 181 days ago

Notes History

Id	View	Applicant Name	Applicant Email	Applicatio...	Reviewer...	Reviewed...	Name	Primary Email	Category▲	Categoriz...	Reviewer...	Is th
				All	All			morg	All			
89	View			Submitted	BSU Foun...	01/20/2015		morg	Submitted	01/20/2015	50.0	
86	View			Accepted	BSU Foun...	01/20/2015		morg	Submitted	01/20/2015	60.0	
90	View			Accepted	BSU Foun...	01/20/2015		morg	Submitted	01/20/2015	83.33	

3. **Compare all responses to a particular evaluation question:** Type in a desired response into the search box below a particular question to view any application where evaluators selected that response.

Success Scholarship

▼ Winter 2015 | Ended 125 days ago

NotesHistory

Reviewer...	Reviewed...	Name	Primary Email	Category	Categoriz...	Reviewer...	Reviewer No...	Is the person a finalist?	Essay	Cor
All				All				Yes		
Success S...	01/05/2016			.. Submitted	01/05/2016	87.14	Excellent essay...	Yes	80	80
Success S...	01/05/2016			.. Submitted	01/05/2016	55.71	Wonderful pres...	Yes	60	50
Success S...	01/05/2016			.. Submitted	01/05/2016	85.71	Bo is an excelle...	Yes	80	80
Success S...	01/05/2016			.. Submitted	01/05/2016	60.0	Great candidat...	Yes	50	70

4. **Export the data as an Excel file:** If needed, you can export the information on screen as an Excel file (CSV format). This will allow you to work with this information using the available tools in Excel or to send this information to others as needed.

315 View Matthew Thomas matthew.thom... Offered

314 View Generate Report Offered

308 View Jim Anderson joe.ph... Offered

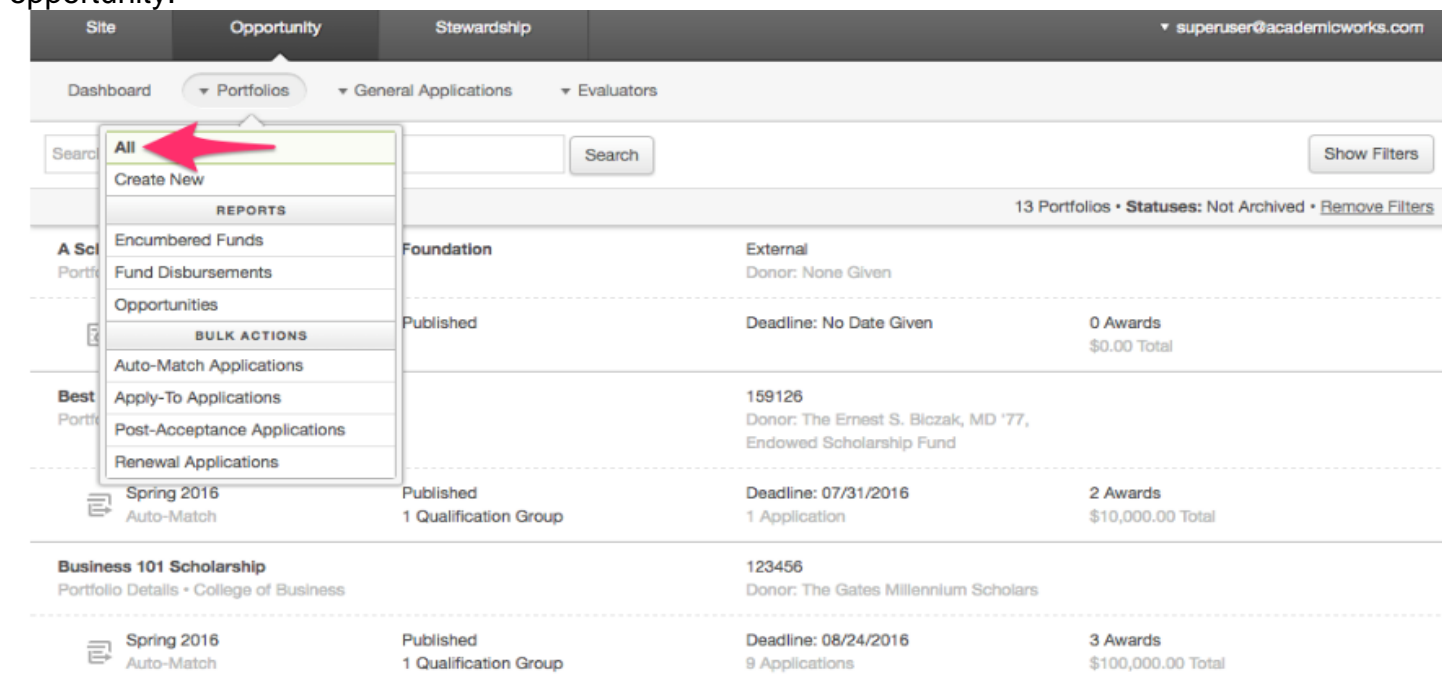
Complete View

How to Offer Awards to Applicants in an Opportunity

Once your reviewers have finished reviewing all applications, it may be time to extend award offers to the best applicants. Award offers can be made from any opportunity's Applications tab either applicant-by-applicant or in bulk. *Please ensure that your system's **categories** and **Offer communications** have been set appropriately before proceeding with awarding.*

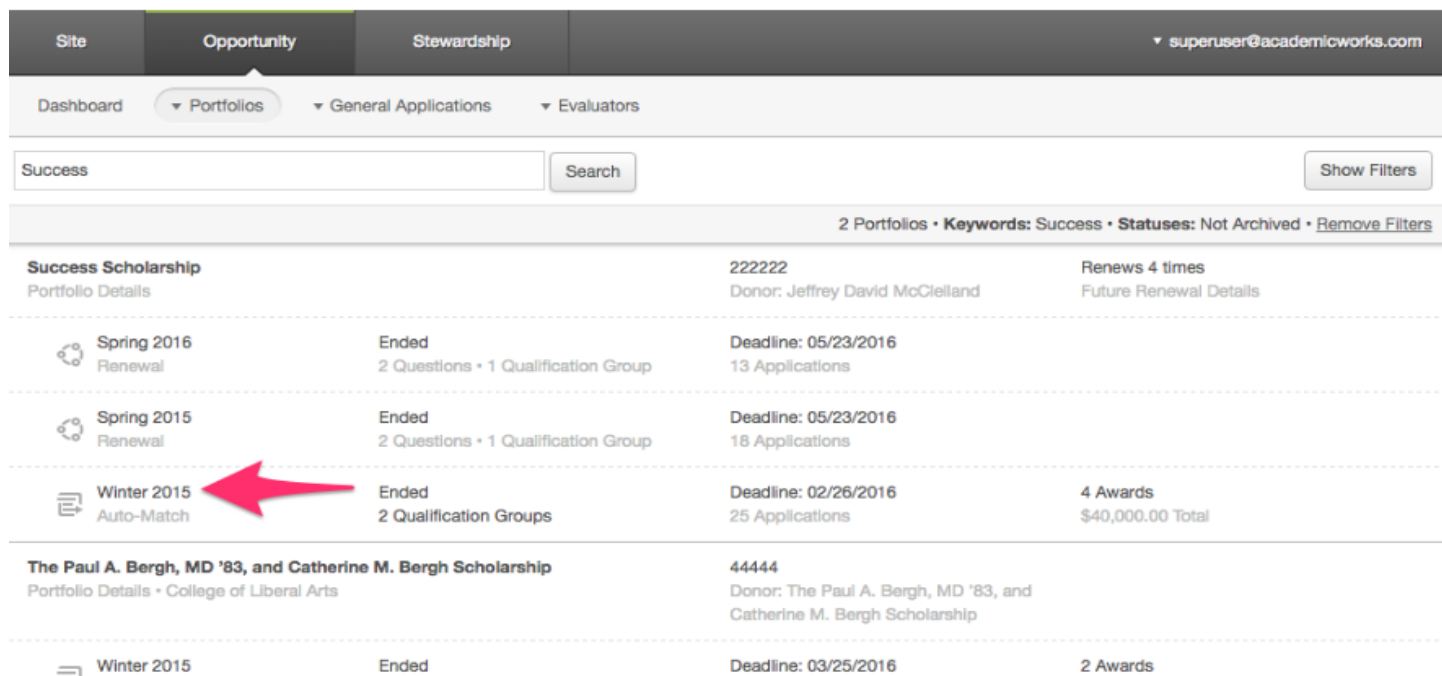
1. Extending a Single Award Offer

1. While logged in as an administrator, go to the Opportunity section and select the Portfolios menu's "All Portfolios" page and locate the desired opportunity. Click on the season time stamp to open the opportunity.



The screenshot shows the AcademicWorks interface with the 'Opportunity' tab selected. A dropdown menu is open under 'Portfolios', with 'All' highlighted by a red arrow. The menu includes options like 'Create New', 'REPORTS', 'Encumbered Funds', 'Fund Disbursements', 'Opportunities', 'BULK ACTIONS', 'Auto-Match Applications', 'Apply-To Applications', 'Post-Acceptance Applications', and 'Renewal Applications'. The main table displays a list of portfolios, including 'Foundation', 'Published', and 'Business 101 Scholarship'.

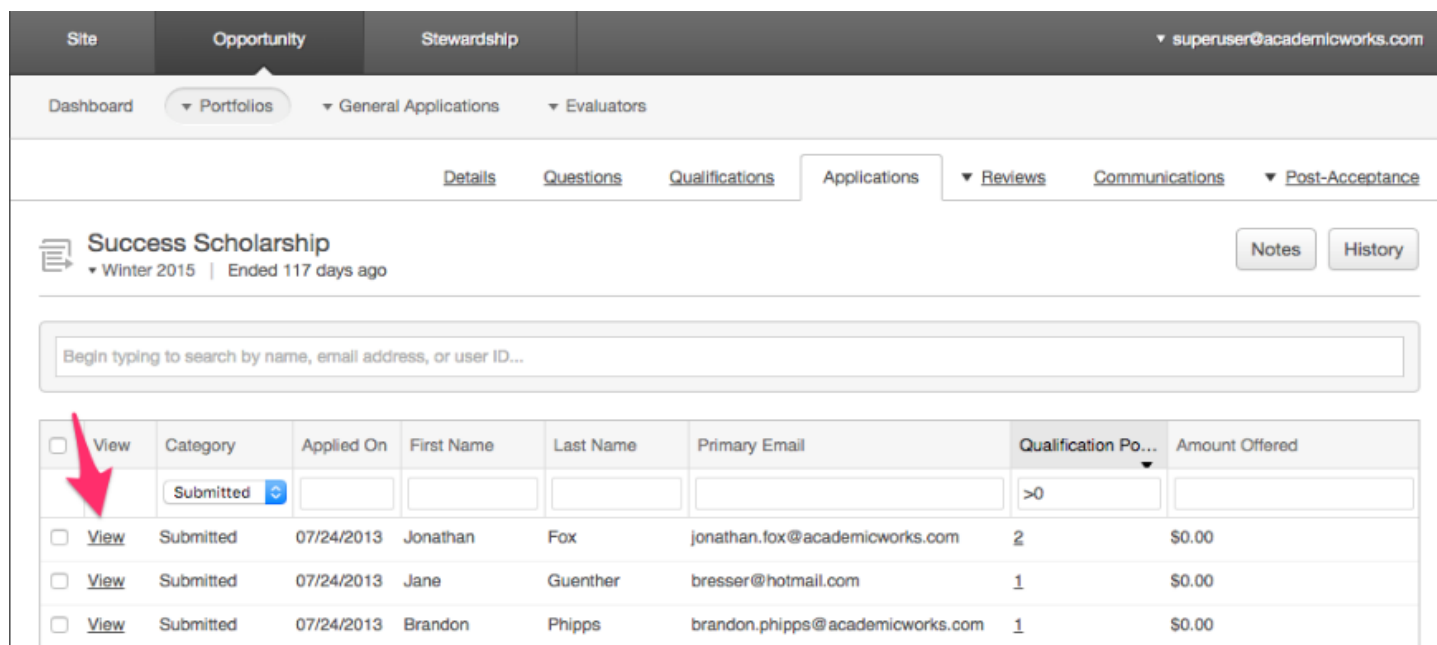
Site	Opportunity	Stewardship	superuser@academicworks.com
Dashboard	Portfolios	General Applications	Evaluators
13 Portfolios • Statuses: Not Archived • Remove Filters			
Foundation	External	Donor: None Given	
Published	Deadline: No Date Given	0 Awards	\$0.00 Total
159126	Donor: The Ernest S. Biczak, MD '77, Endowed Scholarship Fund		
Spring 2016	Published	Deadline: 07/31/2016	2 Awards
Auto-Match	1 Qualification Group	1 Application	\$10,000.00 Total
Business 101 Scholarship	Portfolio Details • College of Business	123456	Donor: The Gates Millennium Scholars
Spring 2016	Published	Deadline: 08/24/2016	3 Awards
Auto-Match	1 Qualification Group	9 Applications	\$100,000.00 Total



The screenshot shows the AcademicWorks interface with the 'Opportunity' tab selected. A search for 'Success' has been performed, resulting in 2 portfolios. The 'Winter 2015' row is highlighted by a red arrow. The table displays details for 'Success Scholarship' and 'The Paul A. Bergh, MD '83, and Catherine M. Bergh Scholarship'.

Site	Opportunity	Stewardship	superuser@academicworks.com
Dashboard	Portfolios	General Applications	Evaluators
2 Portfolios • Keywords: Success • Statuses: Not Archived • Remove Filters			
Success Scholarship	Portfolio Details	222222	Donor: Jeffrey David McClelland
Renews 4 times	Future Renewal Details		
Spring 2016	Ended	Deadline: 05/23/2016	
Renewal	2 Questions • 1 Qualification Group	13 Applications	
Spring 2015	Ended	Deadline: 05/23/2016	
Renewal	2 Questions • 1 Qualification Group	18 Applications	
Winter 2015	Ended	Deadline: 02/26/2016	4 Awards
Auto-Match	2 Qualification Groups	25 Applications	\$40,000.00 Total
The Paul A. Bergh, MD '83, and Catherine M. Bergh Scholarship	Portfolio Details • College of Liberal Arts	44444	Donor: The Paul A. Bergh, MD '83, and Catherine M. Bergh Scholarship
Winter 2015	Ended	Deadline: 03/25/2016	2 Awards

- Next, click on the opportunity's Applications tab and a grid of all applications for the opportunity should appear. You may be interested in the values for **Reviewer Score and Qualification Points** columns, or in **filtering the grid** to locate particular applicants. For systems with the Renewal Management Module enabled, the Renewal Applications and Renewal Funds columns will also display any renewal awards that have been categorized for disbursal.
- Locate the applicant to whom you wish to make an offer, and click the “View” link for that applicant.



Site: Opportunity Stewardship superuser@academicworks.com

Dashboard Portfolios General Applications Evaluators

Details Questions Qualifications Applications Reviews Communications Post-Acceptance

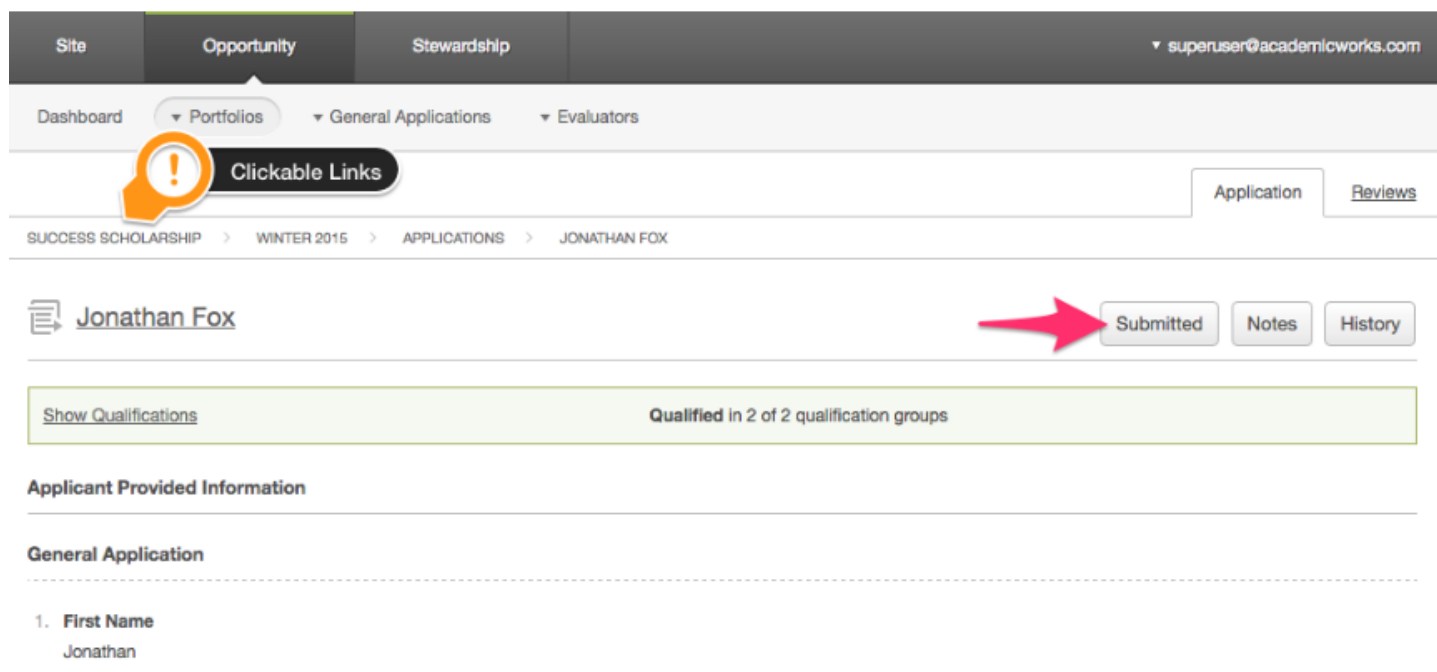
Success Scholarship
Winter 2015 | Ended 117 days ago

Notes History

Begin typing to search by name, email address, or user ID...

<input type="checkbox"/> View	Category	Applied On	First Name	Last Name	Primary Email	Qualification Po...	Amount Offered
<input type="checkbox"/> View	Submitted					>0	
<input type="checkbox"/> View	Submitted	07/24/2013	Jonathan	Fox	jonathan.fox@academicworks.com	2	\$0.00
<input type="checkbox"/> View	Submitted	07/24/2013	Jane	Guenther	bresser@hotmail.com	1	\$0.00
<input type="checkbox"/> View	Submitted	07/24/2013	Brandon	Phipps	brandon.phipps@academicworks.com	1	\$0.00

- The page that opens up will display the user's application for that particular opportunity. You should see a button on the right side of the window that displays the current status or category of the application.



Site: Opportunity Stewardship superuser@academicworks.com

Dashboard Portfolios General Applications Evaluators

Clickable Links

SUCCESS SCHOLARSHIP > WINTER 2015 > APPLICATIONS > JONATHAN FOX

Jonathan Fox

Submitted Notes History

Show Qualifications Qualified in 2 of 2 qualification groups

Applicant Provided Information

General Application

1. First Name
Jonathan

5. Click on the category (i.e. Submitted) button to launch the category updating screen. When you select the "Offered" category from the drop-down menu, additional awarding information will appear. You may wish to review this information before making your decision:

Initial Opportunity Fund Information: Based on the pre-set Total Award Amount for the opportunity, this area informs administrators of how much funding remains available.

- *Note: If the opportunity's award information has not been set, then this will likely show as 0.*
- *Additionally, when extending award offers administrators may encounter an "overextended funds" warning message.*


Award Information: Based on the pre-set Total Award Amount for the opportunity, this area informs administrators of how awards remain available. (*Note: If the opportunity's award information has not been set, then this will likely show as 0.*)

- You may see the following warning message in red when updating the Update Amount field: "Amount must be greater than or equal to \$XXXX and less than or equal to \$XXXX" depending on the minimum and maximum award amounts you have set at the portfolio level. If you are trying to enter an amount that is less than the minimum amount set or greater than the maximum amount set, you **WILL NOT** be able to complete the action. In either of these cases, to successfully complete the award offer, you must return to the opportunity and update those amounts.

Applicant Information: This informs administrators of any other awards the applicant has already received this cycle, as well as the overall amount. For systems with the Renewal Management Module enabled, this area will also display available renewal award information for the applicant. When ready to extend an award offer to the applicant, type in the appropriate award amount (and select an Award Period tag, if your system uses custom Award Periods). When finished, click the green "Update" button.


Update Application CategoryCLOSE X

Choose a Category

Choose Category

Offered

Update Amount

Add Amount

Suggested: \$0.00

Award Period

Choose an Award Period

Initial Opportunity Fund Information

Available Funds	\$40,000.00
Committed Funds	(\$10,750.00)
Remaining Funds	\$29,250.00

Award Information

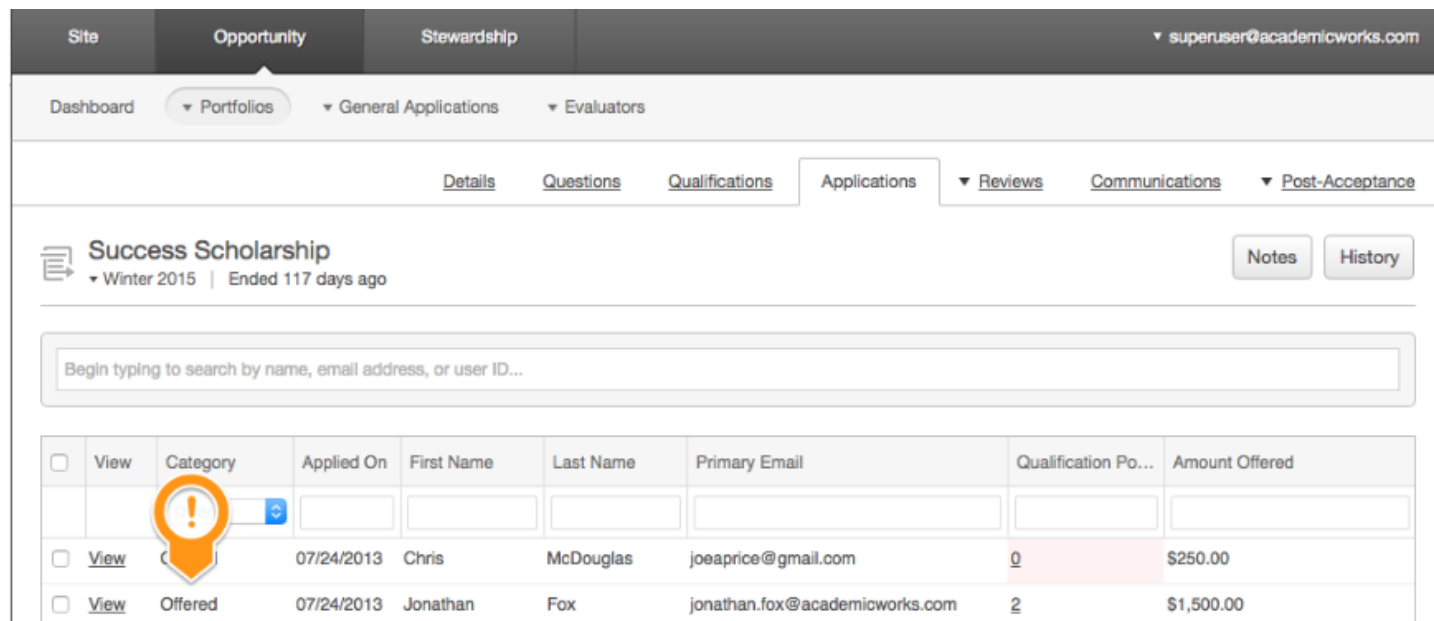
Available Awards	10
Committed Awards	(18)
Remaining Awards	0

Applicant Information

Current Encumbered Applications	2
Current Encumbered Amount	\$3,000.00
Current Renewal Applications:	0
Current Disbursable Amount:	\$0.00

Update Application

6. The category updating screen will close and, in a few moments, the award offer will be extended to the applicant. After waiting a few moments, you may check the opportunity's Applications tab to confirm the award offer. *Note:* Although you have identified this applicant as an award recipient in the system, this may not necessarily be shown to applicants in the Applicant portal. **It also may not necessarily automatically trigger the Offer Email to be sent to award recipients.** To confirm that these items have also occurred, please check the visibility settings of your Categories and the settings of your Offer communications.



The screenshot shows the 'Success Scholarship' page for Winter 2015. The 'Applications' tab is active, showing a table of applicants. A red circle with an exclamation mark highlights the 'Category' column header.

<input type="checkbox"/>	View	Category	Applied On	First Name	Last Name	Primary Email	Qualification Po...	Amount Offered
<input type="checkbox"/>	View	Offered	07/24/2013	Chris	McDouglas	joeaprice@gmail.com	0	\$250.00
<input type="checkbox"/>	View	Offered	07/24/2013	Jonathan	Fox	jonathan.fox@academicworks.com	2	\$1,500.00

2. Extending Award Offers to Multiple Applicants in Bulk

If an opportunity awards more than one applicant with the same award amount (for example, three applicants each receive an award of \$1,500), then administrators may use the Applications grid to process all necessary awards in bulk. To do so, simply take the following steps:

1. While logged in as an administrator, go to the Opportunity section and select the Portfolios menu's "All Portfolios" page and locate the desired opportunity. Click on the season time stamp to open the opportunity.
2. Next, click on the opportunity's Applications tab and a grid of all applications for the opportunity should appear. You may be interested in the values for **Reviewer Score and Qualification Points** columns, or in **filtering the grid** to locate particular applicants. (For systems with the Renewal Management Module enabled, the Renewal Applications and Renewal Funds columns will also display any renewal awards that have been categorized for disbursal.)

3. Locate the applicant to whom you wish to make an offer. On the left side of each row there should be a small check box. Check the box beside each user who will receive an offer.

The screenshot shows the AcademicWorks interface for the 'Success Scholarship' (Winter 2015). The 'Applications' tab is selected. A table lists applicants with columns for View, Category, Applied On, First Name, Last Name, Primary Email, Qualification Po..., and Amount Offered. The first three rows are highlighted in yellow, indicating they are selected.

View	Category	Applied On	First Name	Last Name	Primary Email	Qualification Po...	Amount Offered
<input checked="" type="checkbox"/> View	Submitted	07/24/2013	Jane	Guenther	bresser@hotmail.com	1	\$0.00
<input checked="" type="checkbox"/> View	Submitted	07/24/2013	Brandon	Phipps	brandon.phipps@academicworks.com	1	\$0.00
<input type="checkbox"/> View	Offered	07/24/2013	Chris	McDouglas	joeaprice@gmail.com	0	\$250.00
<input type="checkbox"/> View	Offered	07/24/2013	Jonathan	Fox	jonathan.fox@academicworks.com	2	\$1,500.00
<input checked="" type="checkbox"/> View	Submitted	07/24/2013	Graham	Dunlap	gdunlap@academicworks.com	1	\$0.00
<input type="checkbox"/> View	Submitted	10/05/2015	Bryan	Dotson	bdotson@academicworks.com	1	\$0.00

4. At the bottom of the page, use the Act on Selected dropdown to choose the Categorize option. This allows you to place the selected applications into a new category.

The screenshot shows the 'Act on Selected' dropdown menu with the following options: Email Users, Categorize (highlighted), and Assign To Reviewer Groups. Below the menu, the 'Award Information' section shows 4 Available Awards, 14 Committed Awards, and 0 Remaining Awards.

5. A new window will open. Choose the "Offered" category from the drop-down menu.

The screenshot shows the 'Categorize Selected' window with a 'Choose a Category' dropdown menu. The 'Offered' category is selected and highlighted in blue. Other visible categories include Drafted, Submitted, Accepted, and Declined.

6. The system will next present you with the ability to designate an amount *per applicant* you would like to award. If your system utilizes Award Period tags, you may also select an award period.

Categorize Selected

CLOSE X

Choose a Category

Offered

Update Amount

1500

Award Period

FA2016

Initial Opportunity Fund Information		Award Information	
Available Funds	\$40,000.00	Available Awards	10
Committed Funds	(\$10,750.00)	Committed Awards	(18)
Remaining Funds	\$29,250.00	Remaining Awards	0

Categorize

This will extend award offers to the applicants. After waiting a few moments, you may refresh the page and check the opportunity's Applications page to confirm the award offer.

Note: Although you have identified these applicants as award recipients in the system, this may not necessarily be shown to applicants in the Applicant portal. **It also may not necessarily automatically trigger the Offer Email to be sent to award recipients.** To confirm that these items have also occurred, please check the visibility settings of your Categories and the settings of your Offer communications.

Site

Opportunity

Stewardship

superuser@academicworks.com

Dashboard

Portfolios

General Applications

Evaluators

Details

Questions

Qualifications

Applications

Reviews

Communications

Post-Acceptance

Success Scholarship

Winter 2015 | Ended 117 days ago

Notes

History

Begin typing to search by name, email address, or user ID...

!

!

!

<input type="checkbox"/>	Id	View	Category	Categoriz...	Applied On	Primary Email	Email Aliases	Name	Opportun...	Reviewer...	Award Period	Amount O...
			All								All	
<input type="checkbox"/>	190	View	Offered	06/22/2016	07/24/2013	jonathan.fox@a...	jonathan.fox@a...	Jonathan Fox	90.0	90.0	FA2016	\$1,500.00
<input type="checkbox"/>	188	View	Offered	06/22/2016	07/24/2013	brandon.phipps...	brandon.phipps...	Brandon Phipps	87.14	87.14	FA2016	\$1,500.00
<input type="checkbox"/>	195	View	Offered	06/22/2016	07/24/2013	bresser@hotm...	bresser@hotm...	Jane Guenther			FA2016	\$1,500.00
<input type="checkbox"/>	36...	View	Offered	06/22/2016	01/29/2014	lohls@academi...	lohls@academi...	Lindsey Ohls			FA2016	\$1,500.00
<input type="checkbox"/>	191	View	Offered	06/22/2016	07/24/2013	gdunlap@acad...	gdunlap@acad...	Graham Dunlap	81.43	81.43	FA2016	\$1,500.00

Checklist for Pioneer Scholarship Application Process

- ☐ Write an essay titled “My Story” that tells the scholarship review committee about you. Your essay should be single space and not exceed one page. Be specific about your academic and career goals. Discuss any obstacles you have overcome and any specific financial needs you have. This is your opportunity to share what makes you unique and deserving of a scholarship. If you need help writing your “My Story”, go to the “Tips for Writing Your “My Story” Essay section on our scholarships webpage.
- ☐ Log into AcademicWorks, the Pioneer Scholarship management system, by following the four easy steps below:
 1. Log in to your MyCSUEB portal
 2. Click on the “Students Tab”
 3. Click on the “Pioneer Scholarships” link at the bottom of the page
 4. Click on the “Sign In” box in the upper right hand corner
 5. Click on the “Sign In” With Your Institution” box
- ☐ Once logged into AcademicWorks, complete your general scholarship application:
 1. Once signed in for the first time, you will be taken to the General Application.
 2. Answer the General Application questions. If you have already written your “My Story” essay, you can copy and paste it in the appropriate field.
 3. Under the “General Application Progress” heading on the left-hand side of the page, click “Applicant Record”.
 4. Review your information in the Applicant Record Data section and verify that it is accurate. You may update or make changes to personal information, such as your phone number, mailing address, or email address, via MyCSUEB portal. For questions pertaining to your academic information, please contact the Registrar’s Office.
 5. Click on the “Finish and Submit” button on the bottom of the page.

*Please note: You can edit the information on the General Application at any time until the deadline for each scholarship opportunity. If you do change any information in your general scholarship application, including profile information or applicant record data, prior to the scholarship deadline, it will get updated for all scholarships for which you’ve applied.

- ☐ Once you complete the General Application and click Finish and Submit, you will see a list of scholarships that are recommended for you to apply to if you meet the criteria listed. There you will also be able to view the individual deadlines for each scholarship.
- ☐ Click on “Other Recommended Opportunities” to see a list of scholarship opportunities you may qualify for based on imported data in your applicant record and the information from your General Application.
- ☐ Click on “My Applications” to see the status of your applications. Be sure to apply for all Recommended Scholarship Opportunities you qualify for.
- ☐ If you have any questions about the Pioneer Scholarships and/or the AcademicWorks System, you can contact Karima Karim in the Office of Financial Aid and Scholarships (Karima.karim@csueastbay.edu).

Writing “My Story”

Here is the prompt for the “My Story” Essay:

Write an essay titled “My Story: that tells us about you. Be Specific about your academic and career goals, and how you plan to reach those goals. Discuss any obstacles you have overcome and any specific financial needs you have. This is your opportunity to share with us what makes you unique and deserving of a scholarship.

Here is the prompt broken down into its essential components:

(1) Write an essay titled “My Story” that tells us about you. Be specific about your academic and career goals, and how you plan to reach those goals.

TIPS: Mention your major, or program you are pursuing. Also, if you feel you haven’t settled on a direction or major, discuss the options you are considering and what you’re doing to settle on an option. The point is to show that you are mature and are thinking of your own future. The readers want to award a student who will put the scholarship money to good use.

- I want to be a teacher and work in a school that serves low-income children.
- I want to be an engineer and work for Cisco so that I can create new products that will keep Silicon Valley a strong and competitive location for the tech industry.
- I’m not sure what I want to do, but I am considering becoming a financial analyst. I’ve talked to some of my friends’ parents. I also plan on contacting different colleges about their Graduate level economics and business programs. Also....

(2) Discuss any obstacles you have overcome and any specific financial needs you have. This is your opportunity to share with us what makes you unique and deserving of a scholarship.

Obstacles can be anything from your financial situation, to being the first in your family to go to college, to not having your own mode of transportation. You just have to show why that obstacle is important and why a scholarship will help you overcome this and other obstacles.

TIPS:

First, describe an obstacle.

1. Not having a car
2. Being a parent and going to school full time
3. Family pressures
4. Financial situation

Second, discuss how you overcame that obstacle.

1. Not having a car: I take the bus to school even though it takes me two hours to get to school every day. I also carpool when I can.
2. Being a parent and going to school full time: I am a single parent with two kids. My family and friends help me with child care so that I can go to school....
3. Family pressures: My parents prefer that I don’t go to school and that I work full time to help with the family finances. Because it’s important for me to finish school, I work full time and attend night classes...
4. Financial situation: Although my parents help me with college expenses, money is tight since the economy has been down. I currently work part time, but it doesn’t pay well enough to help me with all of my educational expenses.