



**Scholarship Management System**  
**Module 10 – Setting up Your Evaluation Tasks and Review**  
**Committees**  
**Training Guide**  
**Ver 7.5**  
**Updated on: 7/2015**

Prepared by:

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### Module 10 – Setting up your Evaluation Tasks and Review Committees

In this module we will cover how to set up your evaluation process. We will cover, how to set up the Evaluations tasks and scorecards, creating the review committees, assigning applicants to tasks and committees, and how to use the automated scoring feature.

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## 1. The Evaluation Process

### 1.1 Using Status Details to Track Applicants

Once you start assigning applicants using the Evaluations>Evaluation Setup>Assignments, the **Status** of your applicants will automatically be set to “Under Committee Review”.

Therefore, if you have multiple stages or steps to your Evaluation Process, it is **best practice** to create **Status Details** for each stage of your process, this will help you track your applicants throughout the evaluation stages.

#### Examples of using Status Details to track applicants in the Evaluation Process:

- 1) Your applicants have “Submitted” their application and you need to check for compliance and confirm that all documentation has been received, or you need to complete additional questions in the Staff section, or you have some other step prior to assigning them for review that you need to track where you are on that step. You can create a Status Details for tracking, and once you complete this check or steps, change the applicant to show that Status Detail. Then when looking at the Review reports you can determine who of your “Submitted” applicants you have completed and who hasn’t been completed by looking for this Status Detail.
- 2) You have multiple stages in you review process and in each stage need to qualify applicants that are “Under Committee Review” to move forward or stop at that stage and not be qualified to move forward. Since this is the case, when you see the Status of “Under Committee Review” you need more detail about where they are in the review process. You can create multiple Status Details, two for each stage, one for the qualifying and on for this disqualifying. Then when assigning for the next stage, you can filter on the Status of “Under Committee Review” and the Status Detail for the qualifying of the previous stage and only get a listing of those applicants that have qualified to move forward.

**Important:** Once you determine all the Status Detail types you will need, you will need to have you Global Admin create those for you in the **Administration>Status Details** setup. Once they have been setup and activated they will be available in all Status Detail Dropdown menus for your use.

### 1.2 Setting up the Evaluation Process:

There are three main steps to setting up your on-line evaluation process.

- **Tasks** – Create the separate evaluation task steps.
- **Committees** – Create committee groups and assign committees members to each group.
- **Assignments** -Assign applications to evaluation Tasks and assign committee members to review those applicants.

The evaluation setup will need to be created on **each separate application** form according to the application process type you are using:

**1 to Many** – *(one application that is used to apply for multiple funding sources)* setup the evaluation process on the application that applicants are using to apply to all your funding sources.

**1:1** – *(each funding source has its own application process)* – setup your evaluation process on each separate application form.

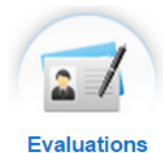
**Common Application** – *(one common application, that then, automatically, pushes data down to separate funding source applications)* – setup your evaluation process for each separate funding source on that funding source’s child application, not on the common application form.

**Two-stage, two application process** – *(you have applicant’s apply to one application form, then after internal qualification by staff on the first level, they are directed via an application link in the first application to an additional application to finalize the application for a specific funding source)* – depending on how you review the first level application, you may need to setup your evaluation process on the first level application as well as the additional application. If both application levels need to have a review process setup to review those applicant’s involved, then you will need to set up each application with its own evaluation setup process to effectively review in each level.

The setup of the evaluation process is all completed under the **Evaluation Setup dashboard**.

### 1.3 Accessing the Evaluation Setup - Dashboard

- **Step 1:** From the **Home dashboard** select the **Evaluations** icon or you can access it by clicking on **Evaluations** in the Navigation link at the bottom of the page.



Home

CommunityForce | CommunityForce Training Site Database

[Business Intelligence](#) | [Applications](#) | [Scholarship](#) | [Evaluations](#) | [Reports](#) | [Help](#) | [Logout](#)

- **Step 2:** This will direct you to the Evaluation application’s listing. Select the application you want to setup your evaluation process on, by clicking on the application name under the Application Form Column.

Home > Evaluations

Application Form	Scholarship	Sponsoring Organization	Start Date	Deadline	
<a href="#">Master Template</a>			N/A	N/A	
<a href="#">2015-2016 Application For all funding</a>	2015-2016 Scholarship Application for all funding	Test My Organization Name 1	06/12/2015	06/01/2016	✘
<a href="#">Financial Aid Recipient Application Form</a>	Scholarship Fund Template - Training Sample	My Organization Name 3	11/07/2013	12/31/2014	✘
<a href="#">Form for organization accepting Graduates based on Merit and Financial need</a>	Scholarship for organization accepting Graduates based on Merit and Financial need	My Organization Name 5	01/15/2014	12/31/2014	✘
<a href="#">Form for organization accepting High School applicants with Multiple funds &amp; Multiple Request Sections</a>	Scholarship for organization accepting High School applicants with Multiple funds & Multiple Request Sections	My Organization Name 11	01/03/2014	12/31/2015	✘
<a href="#">Form for organization accepting Undergraduates based on Merit and Financial need</a>	Scholarship for organization accepting Undergraduates based on Merit and Financial need	My Organization Name 4	01/15/2014	12/31/2014	✘
<a href="#">Form for organization with multiple funds accepting Adult Learners</a>	Scholarship for organization with multiple funds accepting Adult Learners	My Organization Name 7	10/03/2013	12/31/2014	✘
<a href="#">Form for organization with multiple funds accepting High School applicants</a>	Scholarship for organization with multiple funds accepting High School applicants	My Organization Name 2	01/01/2014	12/31/2015	✘
<a href="#">Form for organization with one fund accepting Adult Learners</a>	Scholarship for organization with one fund accepting Adult Learners	My Organization Name 6	11/07/2013	12/31/2014	✘

- **Step 3:** You will be directed to that application’s Evaluations dashboard.
- **Step 4:** Select the Evaluation Setup icon



### Evaluation Setup

Home > Evaluations > Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections

Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections

- Applicant Status
- Evaluation Setup
- Evaluate Applicants
- Reports
- Section Release
- Notification Center

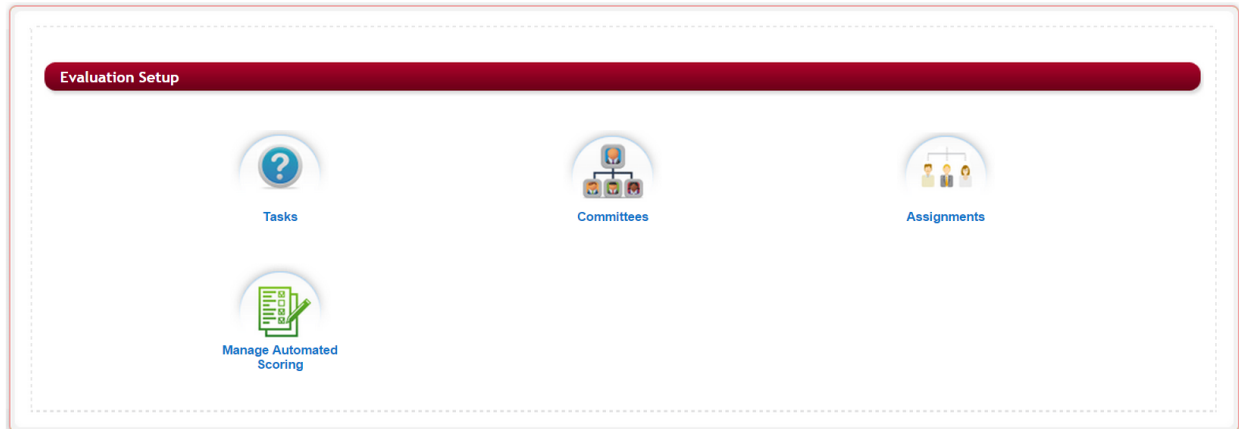
➤ **Step 5:** This will open the Evaluation Setup dashboard:

Home > Evaluations > Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections > Evaluation Setup

Evaluation Setup

- Tasks
- Committees
- Assignments
- Manage Automated Scoring

## 1.4 Overview of the Evaluation Setup Dashboard



The Evaluation Setup dashboard consists of four icons:

**Tasks:** The tasks used to complete your evaluation process. Tasks are where you would create the actual score cards that are used when scoring your applicants, as well as any task that you want to assign to specific staff and reviewers to complete and be able monitor the completion of the tasks.

**Committees:** the review committees and staff committees that will be performing the various tasks in your evaluation process.

**Assignments:** where you would assign applicants to the tasks and the committees to those tasks and applicants.

**Manage Automated Scoring:** allows you to set up automatic scores that would automatically assign a score to a question if the applicant answered a specific value.

## 1.5 Creating an Evaluation Task

- 1) When would I need to set up a task?
  - a. Any time you have a stage in your process that requires you to assign applicants to be reviewed by staff or a review committee, where they need to answer a question, series of questions, or enter a comment about that applicant, and you need to know how each separate reviewer or staff member answered that specific question, or comment for each applicant.
  - b. You need to setup a scoring rubric and assign your review committee to score applicants based on that scoring rubric.
- 2) When would I not need to set up a task?
  - a. You have multiple staff members reviewing for compliance but don't need to track if they have completed their assignments or not, you could get by with just having that



staff member change the applicants Status Detail to show the stage has been completed.

### 1.5.1 How many tasks should I set up for my evaluation process?

There are times when you can set up one task for all your reviewers to reviewer, but there may be instances when you may need to add multiple tasks to an evaluation process. The following are some scenarios are clients have had:

1. **One to One application form (or a common application process reviewing the separate funding source application form)**
  - a. One committee reviews one time and the review is completed – **only one task for that process is required.**
  - b. I have multiple stages in my review process that I need to view scoring on to move the applicants to the next stage – **create a task for each stage** in the process, making sure to turn that task off once it has been completed by unchecking the “Display of Review Reports”.
2. **One to Many application form**
  - a. One committee reviews all the applicants that have applied using the same scoring task to review them. Then the applicants are matched to their funding sources that they qualify to. Those applicants that scored the highest are then awarded the fund. – **create one task for the scoring review.**
  - b. One Committee reviews all the applicants that have applied but there are multiple stages in the review process but each process has the same scoring task to review them. - **Create a task for each separate stage. Check the “Display on Review Reports” on only the active stage. Then Make sure to uncheck the “Display on Review reports” once that stage is completed before moving to the next task, and then “Check the Display on Review reports for the next task in sequence.**
  - c. One committee reviews all the funding sources, but each funding source has its own scoring system and applicants could be reviewed multiple times if they are matched in more than one funding source. Each review could have a different score due to each funding source having different requirements. – **create a task for each separate funding source. Make sure when viewing the applicant’s scores you have only that task active and marked “Display on Review Reports”, and all the others turned off with the “Display on Review Reports” unchecked, to be able to see only that applicant’s score for that specific task. If you also had different stages for each funding source, you would need to create each stage as a separate task for each funding source.**
  - d. There are different Committees that review different funding sources each committee uses the same scoring task, but there could be crossover of applicants matching to multiple funding sources that are reviewed by different committees. Some of those

committees may review multiple funds by the exact same committee, exact same members reviewing, (i.e. a foundation committee reviews all the funding sources that are foundation funds) but then other committees review separate funding sources that they are directly involved with.

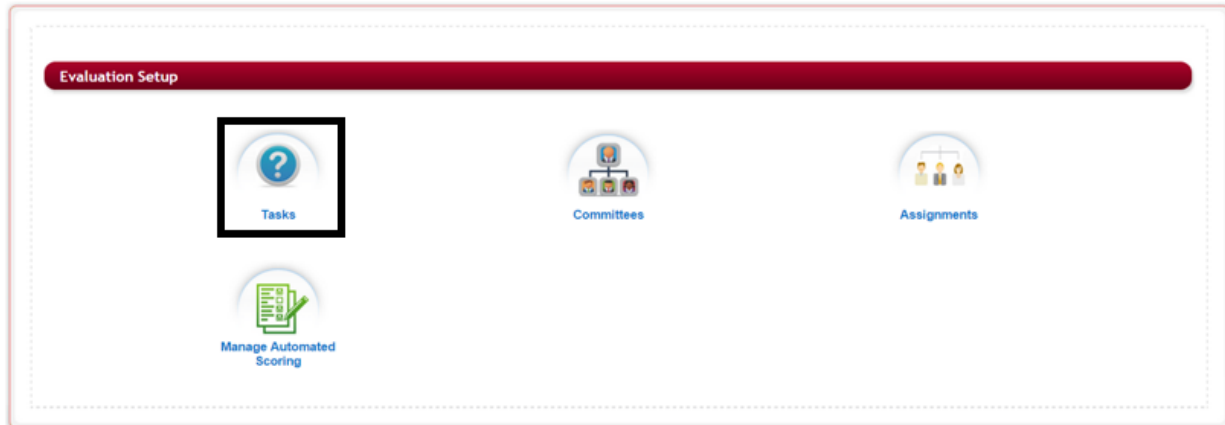
- i. **Each separate committee would have to have its own task to be able to track how the applicant scored on the separate funding source(s).**
  - ii. If the *same committee* is reviewing multiple funding sources, using the *same scoring* task and that score *will not change* on the same applicant if they are matched to more than one funding source that the same committee is reviewing, **then you can create a task for that specific committee. When assigning the task, select all the funding sources at one time to assign all the applicants that match to all the funding sources at once to the committee reviewing that task. When reviewing the final scores for that committee, you will need to make sure that only that task is checked to Display on Review Reports, or the task is selected when awarding the individual funding to the applicants.**
- e. There are different Committees that review different funding sources each committee has its own scoring task that is different from the others, or they have the same scoring task and reviewing multiple funding sources, but each applicant matched in that separate funding source score could be different in another funding source they matched to that the same committee is reviewing. **For each individual funding source that the committee reviews, there would need to be a separate scoring task created. (I.e. if they reviewed one fund, then one task can be created for just that one committee, but if they review multiple funds, since each fund can have a different score, each separate fund has to have its own scoring task and assigned separately to the committee.) As you review the scores it is very important to make sure you have the correct task checked and activated using the “Display on Review Report”**

### 1.5.2 Create a Task

- **Step 1:** While in the Evaluations Setup dashboard for your application, select the Tasks Icon.



Home > Evaluations > Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections > Evaluation Setup



- **Step 2:** The Tasks listing will appear listing any tasks that have already been added to your application. If you have not created any tasks this listing will be empty.

Home > Evaluations > Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections > Evaluation Setup > Tasks



- **Step 3:** You can clone an existing task or create a new task.



**Step 3a Create Task** – Click on the Create Task to create a New Task

**Step 3b Clone a Task** – Click on the **Clone Task** to clone an existing task that you have created in another application form, or within this same application form. Cloning a task will clone all the questions from the prior task and allow you to keep the XML name for the questions in each task the same. This is useful when you have multiple applications or funding sources that use the same scoring rubric but need separate review tasks for each funding source or application. This is also helpful for when the reviewers are reviewing in the same application form, for different funding sources, that have the same scoring rubric. When the reviewer reviews an applicant they may have in another task, they can then have the option to have the same applicant’s scores pushed down from task to task without having to rescore that applicant again on the exact same questions.

Select the Application that contains the task you want to clone, and then select the task from that application.

➤ **Step 4: Task Name** - Assign a name to the task.

**Best Practice Tip:** When assigning a name to a task, think about how your reviewers will see this name. Make sure it is something that they will understand.

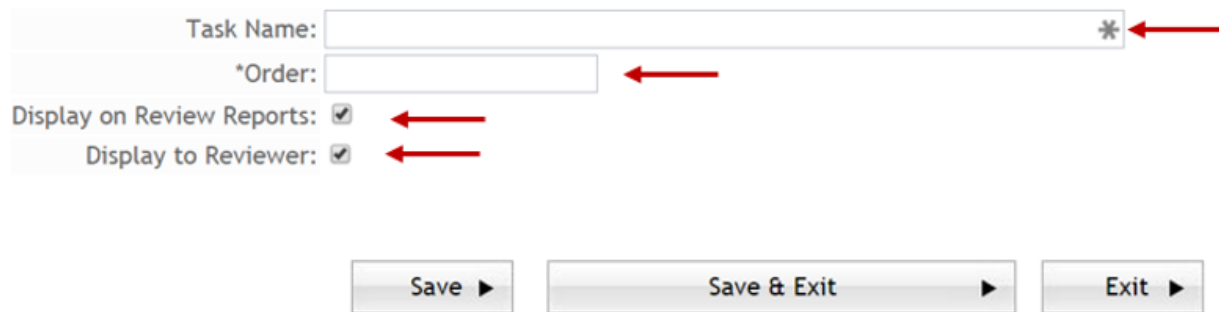
**For Example:**

When creating separate tasks that are needed for reviewing each separate funding source, it may be best to name the task the same name as that funding source, so that you reviewers

better understand the task they are reviewing and its purpose. i.e. - **Jones Scholarship Scoresheet**

If you have multiple committees reviewing multiple funding sources using a task specific to their review process only that may be used by the same committee to review multiple funding sources at one time, you may decide to name the task after that committee. i.e. - **Foundation Committee Scoresheet** - reviews all the foundation funding sources using the same scoresheet.

If you have a review process that is done in separate steps/stages name the review task with that specific step/stage: i.e. – **Qualification Review, Scoring Round 1, Scoring Round 2, etc.**



The screenshot shows a form with the following fields and controls:

- Task Name:** A text input field with an asterisk icon on the right. A red arrow points to the asterisk.
- \*Order:** A text input field. A red arrow points to the field.
- Display on Review Reports:** A checkbox that is checked. A red arrow points to the checkbox.
- Display to Reviewer:** A checkbox that is checked. A red arrow points to the checkbox.
- Buttons:** Three buttons at the bottom: "Save", "Save & Exit", and "Exit".

- **Step 5: Order** – Select the Task order – this is the stage order that the task is performed during your evaluation process.
- **Step 6: Display on Review Reports:** When viewing the average scoring on tasks in the **Evaluate Applicants>Review Results**, the Avg. Score column, in that report, will show the *total combined* average score for that applicant of all tasks that have the “Display on Review Reports” selected at the time you view it. Therefore, if you only want to see the average score for one task at a time, you will need to unselect all the score cards you do not want to view and select only the score card you do want to review.
  - **Note:** that in order to assign the committees and applicants to a task, that task must have the **Display on Review Reports** selected. Then when you are ready to view the scoring results for each task in the Review Results, you will need to unselect all the tasks, except the task you want to review. When you are ready to move to the next task, unselect the prior and select the new.
- **Step 7: Display to Reviewer:** Select this for the task to appear on the Reviewers dashboard. Once your review process is complete you can unselect this so that your reviewers can not go in and change their scores at a later time.
- **Step 8:** Click on Save or Save and Exit, to return to the Task listing.

**Note:** you will need to create a separate task for each stage in your evaluation process. If you have different review processes, or different committees on each funding source you will need to create a different task for each funding source. However, if you have funding sources that have the exact same

scoring rubric on every funding source, and the committee members are the exact same on every funding source review, and the scores would not be different from one funding source to another, you can create one task to use for all those funding sources.

### 1.5.3 Editing a Task/Evaluation Step

Once you have created a new task it will show in the listing of Tasks.

- To Edit a Task Name, click on the Task Name to open the Add/Edit Tasks. Be sure to Click on Save or Save and Exit to save any changes you have made.
- To Edit a Task score sheet or questions, click on the Create/Edit under the Score Sheet column

Home > Evaluations > Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections > Evaluation Setup > Tasks

Up	Down	Sort Order	Task Name	Display on Review Rpts	Display to Reviewer	Score Sheet
✗ ▲ ▼		1	Initial Review by Staff	Yes	Yes	Create/Edit
✗ ▲ ▼		2	Score Sheet	Yes	No	Create/Edit
✗ ▲ ▼		3	Score Sheet	Yes	Yes	Create/Edit
✗ ▲ ▼		4	Initial Review by Staff2	Yes	Yes	Create/Edit
✗ ▲ ▼		5	Initial Review by Staff3	Yes	Yes	Create/Edit

Go to Page 1 Go      Page 1 Of 1      Display 10 Records per Page

### 1.5.4 Deleting a Task/Evaluation Step

- To Delete a Task, click on the red "X" next to the Task Name in the task listing.

**Caution:** deleting a task will delete any data entered on that task by your reviewers.

Tasks								
							Create Task	Clone A Task
	Up	Down	Sort Order	Task Name	Display on Review Rpts	Display to Reviewer	Score Sheet	
<input checked="" type="checkbox"/>	▲	▼	1	<a href="#">Initial Review by Staff</a>	Yes	Yes	<a href="#">Create/Edit</a>	
<input checked="" type="checkbox"/>	▲	▼	2	<a href="#">Score Sheet</a>	Yes	No	<a href="#">Create/Edit</a>	
<input checked="" type="checkbox"/>	▲	▼	3	<a href="#">Score Sheet</a>	Yes	Yes	<a href="#">Create/Edit</a>	
<input checked="" type="checkbox"/>	▲	▼	4	<a href="#">Initial Review by Staff2</a>	Yes	Yes	<a href="#">Create/Edit</a>	
<input checked="" type="checkbox"/>	▲	▼	5	<a href="#">Initial Review by Staff3</a>	Yes	Yes	<a href="#">Create/Edit</a>	

Go to Page  Go      Page 1 Of 1      Display  Records per Page

- You will receive the System Message confirming the deletion

System Message
189

Are you sure you want to delete this step?

Yes
No

- Select yes and you will receive a Status update that the task/step has been deleted.

Status Update
190

This step has been deleted.

Ok

- Select OK and you will return to the Task listing.

### 1.5.5 Adding a Score Sheet or Questions to a task

- In order to track completion of a task, depending on the type of task(s) you have, you will need to add either basic questions for your reviewers to answer, or create your scoring question(s) for your online scoring task(s).

- **Step 1:** While in the **Evaluations Setup>Tasks** listing, click on the **Create/Edit** located to the right of the task under the Score Sheet column.

Home > Evaluations > Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections > Evaluation Setup > Tasks

Up	Down	Sort Order	Task Name	Display on Review Rpts	Display to Reviewer	Score Sheet
✗	▲ ▼	1	Initial Review by Staff	Yes	Yes	Create/Edit
✗	▲ ▼	2	Score Sheet	Yes	No	Create/Edit
✗	▲ ▼	3	Score Sheet	Yes	Yes	Create/Edit
✗	▲ ▼	4	Initial Review by Staff2	Yes	Yes	Create/Edit
✗	▲ ▼	5	Initial Review by Staff3	Yes	Yes	Create/Edit

- **Step 2a:** If this *was not a cloned* task, then when you first open this section it will appear blank with no questions listed.

No Custom Questions are configured for this Step!

Add Question

- **Step 2b:** If you *cloned* this task from another task, then the cloned questions should appear in the question's listing.

Order	Up	Down	Question	Type	Required	Scoring Comment
✗ 1	▲ ▼		Did staff save the Admin .PDF of the student's application in the appropriate folder on The Community Foundations shared data server? Have the student and the guidance counselor uploaded the appropriate documents to their application? An uploaded note stating "I will get this to you later" will not suffice.	CheckBox	No	No
✗ 2	▲ ▼		For applications to a fund requiring the FAFSA Student Aid Report, check that an actual SAR has been submitted. For all applications, check that a high school transcript has been uploaded by the guidance counselor.	CheckBox	Yes	No

- **Step 3:** Click on the **Add Question** button, to add a new question, or click on the actual **question name to update** an existing question. See the sub-sections following, for more details on creating specific question types.

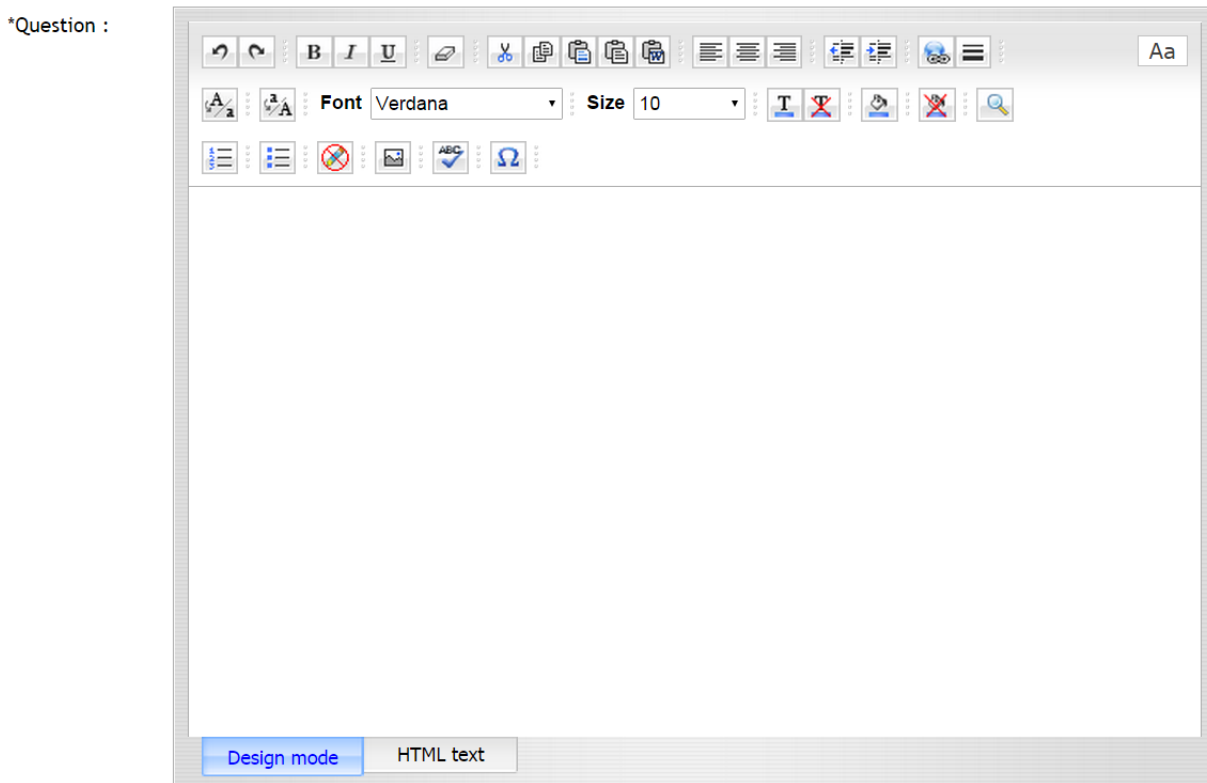
- Questions are added and formatted in the same manner they are added to an Application.



- You can create questions that the reviewers have to answer, i.e. essays, text, yes/no, etc. or create questions where the reviewer has to type a numeric score or chose from a dropdown listing of pre-defined scores that will calculate the total score for the review, i.e. numeric or dropdown.
- **Important:** A score card task can contain any combination of question types available. However, only the questions in that score card task that are formatted as either a **Numeric** or a **Dropdown** question type will be calculated on and included in the scoring total. **Questions formatted as any other question type will not be added to the scoring total.**

### 1.5.5.1 Using the Question Editor Box When Creating Task Questions

- **Question:** Enter the task question that is to be answered by the reviewer for a specific task in the **Question editor box**. If you desire to enter this text using HTML coding, you can do so by clicking on the HTML text tab at the bottom of the editor box.



- **Note:** The way you format the question in the editor box, is how the actual question will appear in the reviewer's dashboard.
- **Design Mode** - This editor will allow you to format text similar to how you would do so in Microsoft Word. Using this feature you can change the font-size, color, style, etc., as well as add additional formatting features to your question as needed.

- **HTML text** - If you desire to enter this text using HTML you can do so by clicking on the HTML text tab at the bottom of the editor box.

### 1.5.5.2 Adding a Bubble instructions

These instructions are brief helpful hints displayed to the reviewer regarding the information requested on this question. A blue icon will appear next to the question. When the reviewer places their cursor on this icon the information will be displayed to them. Enter any instruction for the question that will be helpful to the reviewer. If you have important detailed instructions regarding how to answer a question, it may be better to include that explanation as part of the Question itself or to add an additional “message type” question prior to this question. This will insure that the instructions are not missed by the reviewer.

Bubble Instruction :

#### Example of Bubble Instructions:

**Question:** Please enter your Date of Birth:

**Bubble Instruction:** use date format xx/xx/xxxx

### 1.5.5.3 Adding a Report/Excel Column Name

This is the name that appears as your column headings in Excel exports and reports created in the CommunityForce system. Therefore, it is important to keep this name as a **short descriptive version** of your question so that you do not make your column headers in your reports so long that you are having to scroll through multiple pages to be able to view. Report/Excel Column names cannot be the same. Each question that is created in a task must contain a different column name.

Report/Excel Column Name :

#### Example:

**Question** – Please enter your Last Name only:

**Report/Excel Column Name** – Last Name

### 1.5.5.4 Question XML Name

This is the abbreviated name that the database uses to refer to the question.

- The XML Name is very important when importing applicant data from one application to another or when integrating data from CommunityForce to another database.
- In order for this data extraction (mapping) to be successful, the source application’s task question and the destination application’s task question **must have** the same XML names.
- Once an application has been created, and data is being exported/imported, it is very important to **never change** this name in your application. When creating additional tasks that the reviewer

can export/import scores from one task to the other task, so as not to have to reenter data, the Fields within the one task **must have** the same XML names as the fields of the new task they are importing data to be populated with.

The XML Name and the Report Excel Column Name should usually be the same except the XML Name eliminates spaces between words.

\*Question XML Name :

**Example:**

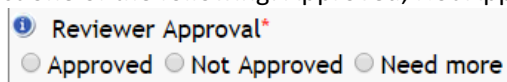
**Question** – Please enter your Last Name only:

**Report/Excel Column Name** – Last Name

**Question XML Name** – LastName

**1.5.5.5 Review of Each Question Type**

- **Checkbox** - The Reviewer is presented with predetermined values to select from via a checkbox. All values are displayed on the application. Reviewer can check multiple values.
- **Currency** - A numeric field formatted with a dollar sign.
- **Date** - **Allows** for a date format of: mm/dd/yyyy
- **DropDown** - The Reviewer is presented with predetermined values to select from a dropdown listing. Reviewer can only select one value from the list. (if a listing of numeric values are provided the numbers will be added and included in the scoring total)
- **Electronic Signature** – Allows you to capture the signature of the reviewer, the reviewer would enter their login in name exactly as it appears in their login profile.
- **Email** - Allows for an email format: xxxxxx@ccc.com
- **EssayBox** - A large data entry area that allows text entry. May have a minimum and maximum number of words.
- **Extended Checkbox** - The reviewer is presented with predetermined values to select from via a checkbox. The values are only displayed when the Reviewer clicks on the checkbox dropdown. Multiple values can be selected.
- **File** - **Allows** the reviewer to upload a document to the question.
- **Float - Numeric** with special characters. Approximate numeric numbers. This question type **will not calculate** in the scoring total.
- **Numeric - Exact** numeric numbers. Best for using arithmetic calculations for exact results. (when a numeric value is entered by the reviewer, the numbers will be added and included in the scoring total)
- **Phone Number** - Allows for a phone number format of: xxx-xxx-xxxx
- **RadioButton**- The reviewer is presented with predetermined values to select via a radio button. Only one value can be selected. All values are visible on the application.
- **Reviewer Approval** – Allows you to create an automatic radio button selection for the reviewer to select one of the following: Approved, Not Approved, or Need More Information.



- **Text** - A short data entry text field.
- **Message** - Allows you to enter a read only message statement, instead of a value related question.

**Best Practice Tip:** Many times you have a scoring question that requires a detailed explanation. Since the question types of Numeric and Dropdown will wrap in the display view, it is sometimes beneficial to first create the explanation detail in a Message question type. Then create a second question directly following that is the numeric or dropdown question for them to reply to.

### 1.5.5.6 How to use a Date Question Type and Set Parameters

The Date Question Type allows you to set the question type as a date field in which the reviewer enters a date as the value. A calendar will appear that the reviewer can select the date from.

**(Note:** when cloning tasks with date type questions, you will need to make sure that the new task date ranges have been moved forward appropriately, the system will not do this for you.)

When you select the Date question type you will be required to enter a minimum date and maximum date range so that the selection calendar can be created.

*Question Type:	<input type="text" value="Date"/>
Required:	<input type="checkbox"/>
Scoring Comment:	<input type="checkbox"/>
Min Date	<input type="text"/>
Max Date	<input type="text"/>

**Min Date** - Enter the minimum date that the reviewer can enter.

**Max Date** - Enter the maximum date the reviewer can enter.

### 1.5.5.7 Setting up Questions that require labels and values

Checkbox, Extended Checkbox, Dropdown, and Radio Button question types all require that you add a listing of values for the reviewer to choose from.

#### Examples:

##### Checkbox -

Please select which activity types you will be entering below. Check all that apply.

<input type="checkbox"/> Athletics	<input type="checkbox"/> Government	<input type="checkbox"/> Music or Band
<input type="checkbox"/> Arts	<input type="checkbox"/> Internship	<input type="checkbox"/> School club or organization
<input type="checkbox"/> Foreign Travel or study	<input type="checkbox"/> Military	<input type="checkbox"/> Other activity

##### Extended Checkbox -

- Sports
- Music
- Drama
- Art
- Class Officer
- Other

Select: [All](#) | [None](#)

**Dropdown - basic**

Select ▾

- AL
- AK
- AZ
- AR
- CA
- CO
- CT
- DE
- DC
- FL
- GA
- HI
- ID

**Radio Button –**

Did the applicant provide all the required items for this scholarship?\*

Yes  No

Once you select one of these question types an **Add Value(s)** button will appear to the right. Values are used to set the listing of possible replies assigned to question types that are check boxes, radio buttons and drop down question types. If using a rubric scoring system you will enter the listing of possible score selections in the Add Value(s) setup.

\*Question Type:  

Display Values		
Label	Value	
Yes	Yes	
No	No	
<input type="text"/>	<input type="text"/>	

[Editor](#) | [Save & Close](#) | [Cancel](#)

When entering the values you will need to enter them in pairs, once as the label and once as the value.

**Label** - The Label entry is the value displayed to the reviewer.

**Value** - Value entry is the report value. If the question type is a dropdown, any number that is used as the value will be the actual number value that will be used in adding totals for your on-line score sheet numeric scoring. (Rubric scoring).

**Example of a dropdown question's values created specifically for the score sheet:**

Display Values		
Label	Value	
Select	Select	✗
1	1	✗
2	2	✗
3	3	✗
4	4	✗
5	5	✗
6	6	✗
7	7	✗
8	8	✗
9	9	✗
10	10	✗
<input type="text"/>	<input type="text"/>	+

[Editor](#) | [Save & Close](#) | [Cancel](#)

There may also be times when you want the reviewer to see something different than the actual value. You would create the label with the data you want the reviewer to see, but then create the value with the actual value it should be when you are viewing reports internally.

**Example of Dropdown values entered to pull scoring, showing a different value than the actual label.**

Question: Select the range that the applicants GPA fall within.  
 (In this example the reviewer would only see the Label column, not the score given for the range)

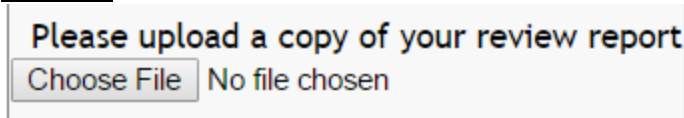
Display Values		
Label	Value	
Select	Select	✗
3.5 or higher	5	✗
3.0-3.49	4	✗
2.5-2.99	3	✗
2.25-2.49	2	✗
2.0-2.24	1	✗
2.23 or below	0	✗
<input type="text"/>	<input type="text"/>	+

[Editor](#) [Hide](#)

### 1.5.5.8 How to use a File Question Type

File Question types are used when you require that a document be uploaded by the reviewer during the review process.

**Example:**



When you select the File Question Type a text box will appear. Provide the list of allowed file extension for the types of documents you will accept for this upload.

\*Question Type:  ⓘ

Required:  ⓘ

Scoring Comment:  ⓘ

\*Display Text:

Provide the list of allowed file extensions above ⓘ

**Accepted file types:** xls, xlsx, pdf, doc, docx, html. When listing the extensions do not enter a period before the file extension

**Note:** Although the above file types are accepted, if you are using the **PDF** feature it is recommended that all uploads be uploaded as PDF documents, formatted in Portrait mode, sized to 8-1/2" x 11". Only files less than 20mb can be uploaded to the program.

### 1.5.5.9 The Use of Messages in Application

Message question types are used to create a message statement to the reviewer, instead of creating a question for the reviewer to reply to. Message questions are useful in creating a header titles to separate multiple parts of a section.

**Example:**

**Academic Performance Section**

**Criterion #1: Academic Performance Measurement:**  
*Refer to the Education Information, Academic Honors and Academic information from the Guidance Counselor sections.* SAT scores at or above the 2013 VA average: Combined Math + Reading = 1030, Writing = 498, Total = 1,529. Class rank in the upper 25%. Academically challenging classes chosen (Academic Honors, higher math, appropriate for career path, etc.). Achievement of academic potential. **Please score 1-10 with 10 being the best score.\***

Select ▼

**Criterion #1: Academic Performance**  
 Please type your comments or notes. This facilitates review discussion.

When using the message question type, you will type the message in the Question box and format it to how you would like it to visible by the reviewer.

\*Question :

**Academic Performance Section**

### 1.5.5.10 How to Use Numeric Fields and Set parameters

Numeric fields are used when numeric values are required or you need to run exact calculations on the numeric values entered by the reviewer. The only separator characters allowed in numeric question types are decimals. Numeric replies will be calculated in the scoring total on the online scoring reports.

Any number that is used as the value in a Numeric question will be the actual number value that will be used in adding totals for your on-line score sheet numeric scoring. (Rubric scoring).

When using the Numeric question type you have the option to control the length of the reply value.



*Question Type:	Numeric
Required:	<input type="checkbox"/> ⓘ
Scoring Comment:	<input type="checkbox"/> ⓘ
Maximum Length	

**Maximum Length** - Sets the number of numeric characters allowed when replying to this question. (i.e. 4.00 = Max. length of 4 characters. The reviewer will not be able to enter a numeric value longer than 4 characters long including the decimal.

### 1.5.5.11 How to Use Text Field

The Text question type is used when a brief text and/or numeric value is required. (I.e. entering a street address such as: 1234 Jones Street, or asking for Last Name, etc.)

*Question Type:	Text
-----------------	------

### 1.5.5.12 How to Use Essay Box Text Field and Set Word Count

The Essay Box question type is used when a reply value requires a lengthy text statement to be typed.

When using the Essay Box question type you can control the length of the reply value entered by the reviewer by setting the minimum and maximum word count. (i.e. 500 words or less)

*Question Type:	EssayBox
Required:	<input checked="" type="checkbox"/> ⓘ
Scoring Comment:	<input type="checkbox"/> ⓘ
Min Word Count	
Max Word Count	

**Min Word Count** - Enter the minimum number of words you require for a reply to the specific question. If you have a maximum but do not require a minimum you can enter "0".

**Max Word Count** - Enter the maximum number of words you require for a reply to the specific question. (I.e. max word = 500 will only allow the applicant to enter 500 words)

A dialogue box will appear on the reviewer's dashboard next to the question, where they can type their reply to the essay question.

**Criterion #1: Academic Performance**  
Please type your comments or notes. This facilitates review discussion.

### 1.5.5.13 When to use the Email Type Question

The Email question type is used only when the required value is an email address. Using the Email question type will only allow a correct email format to be entered in the field. (i.e. [jones@communityforce.com](mailto:jones@communityforce.com))

### 1.5.5.14 How to Use the Phone Number and Force Format

When a required value is a phone number you can use the Phone Number question type to force a specific format to be used when the reviewer enters their phone numbers.

Type:

Select the format:

The following format selections are available:

(XXX) XXX-XXXX  
XXX-XXX-XXXX  
(XXX)-XXX-XXXX

### 1.5.5.15 When to use the Currency Question Type

When a required value is a numeric currency value it is suggested that you use the Currency question type to allow for the formatting of the value in to a currency format. Once the value is entered by the reviewer a Currency symbol will appear on their reply. Prior to setting up the application the administrator should have already preset the main currency type of your organization, (i.e. Dollar \$ or Euro €, etc.)

### 1.5.5.16 Marking a Question Required

In the Question Setup there is an option "**Required**". If a question on the evaluation is required and must be answered by the reviewer, you can mark that question as required and the reviewer's dashboard will not show as 100% complete until the question has been answered.

**Important:** In order for the task to show as a percentage completed in the reviewer's dashboard or task scoring reports, there must be at least one question marked as required.

**Required:**

Check the box if the question is a required question and must be answered by the reviewer.

**1.5.5.17 Adding the Scoring Comment**

Only one question per task/stage is allowed to be checked as the Scoring Comment. It will be displayed in the Comment column “Comment” on your reports and is used for the reviewer to enter their comments regarding the scoring of the specific applicant on that task/step. The question type should be an EssayBox if the question is to be a comment question so that the reviewer can type their comment in the essay field.

Check the box if the question is the reviewer “comment” for the task/stage.

**Scoring Comment:****1.5.5.18 Setting up the Score Card Question Display Order**

“**Display Order**” is the sort order sequence number of the question as it appears on the page as the reviewer is reading the questions. If you enter a number that is already being used by another question in that section, the new question will take that number in the sequence and move the prior question directly after it with the next number in the sequence and all other questions below will be moved down one count.

*This is a required field when creating questions and cannot be left blank.*

*Enter the number that you want the question to fall in sequence on the page as the reviewer is completing the task/stage.*

\* Order

**1.5.5.19 Adding a Downloadable File to a Question**

If you have a document that may be informational to the reviewer in order to answer a specific question, or a template that the reviewer can fill out and upload to a question, you can attach that document directly to the question referring to it, (i.e. the reviewer needs to see the policy and procedures: you can create the question and attach the policy and procedures document directly to the question for the reviewer to view)

You would first enter the question as usual in the question editor box and create the question type for the type of question you want the file attached to. This can be any kind of question type, however, if this document is only informational and not to be re-uploaded it is preferable to make the question a message question. If it is for an upload question you can attached the download to the upload question, but be sure to explain to the reviewer that they need to complete the document and then re-upload it to the same question.

To upload the document that the reviewer needs to see, you will notice at the bottom of each question you create the **Add File to this Question - Upload File**:

- **Step 1:** Click on the **Choose File** to select the file for upload.

**Add File to this Question**

Upload File  No file chosen

- **Step 2:** Once you upload the file it will appear in the upload File field to the left of the Browse button.

Upload File  www.irs.gov\_...pdf\_fw4.pdf

- **Step 3:** Once you **Save and Exit** and return to the question, you can click on the **Remove File** to remove the document.

Upload File  No file chosen www.irs.gov\_pub\_irs-pdf\_fw4.pdf  
[Remove File](#)

- **Step 4:** Be sure to click **Save, or Save & Exit** again to save the question and any changes.

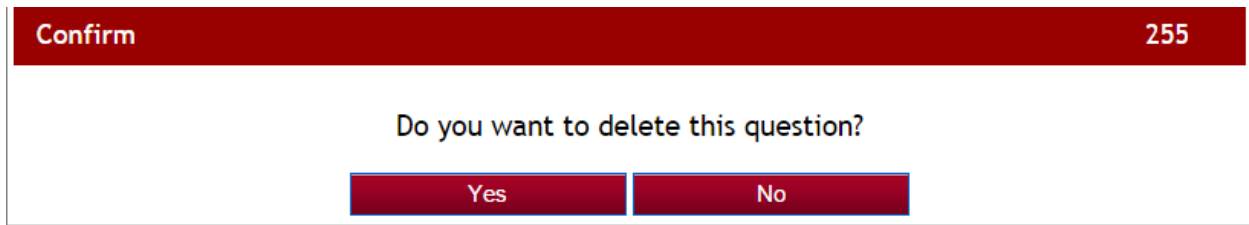
**1.5.5.20 How to Delete a Question from the Score Sheet**

- You can delete a question in the Task Score Sheet by clicking on the red **"X"** next to the Question you would like to delete.

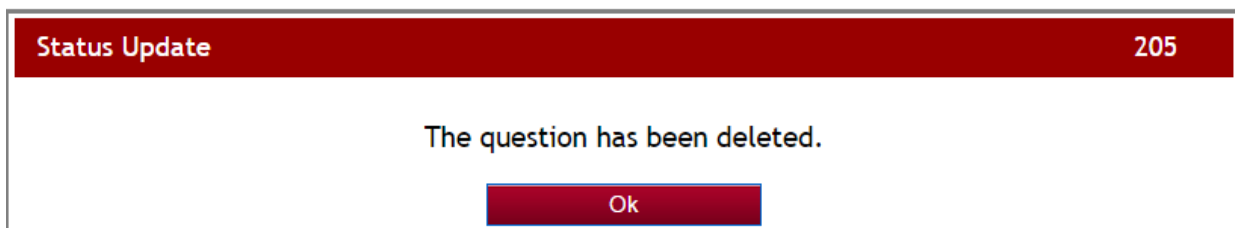
**Caution:** Use caution when deleting a question, you will lose any replies or scores that were already completed on the specific task by your reviewers once the question is deleted.

Questions							<input type="button" value="Add Question"/>
Order	Up	Down	Question	Type	Required	Scoring Comment	
1	▲	▼	Did staff save the Admin .PDF of the student's application in the appropriate folder on The Community Foundations shared data server?	CheckBox	No	No	<input type="button" value="X"/>
2	▲	▼	GPA Points	RadioButton	Yes	No	<input type="button" value="X"/>
3	▲	▼	Have the student and the guidance counselor uploaded the appropriate documents to their application? An uploaded note stating "I will get this to you later" will not suffice.	CheckBox	Yes	No	<input type="button" value="X"/>
4	▲	▼	For applications to a fund requiring the FAFSA Student Aid Report, check that an actual SAR has been submitted. For all applications, check that a high school transcript has been uploaded by the guidance counselor. Comments:	EssayBox	Yes	No	<input type="button" value="X"/>

- You will receive a message to confirm the deletion. Click yes.



- Once the question has been deleted you will receive a message stating that it has been deleted. Click ok.



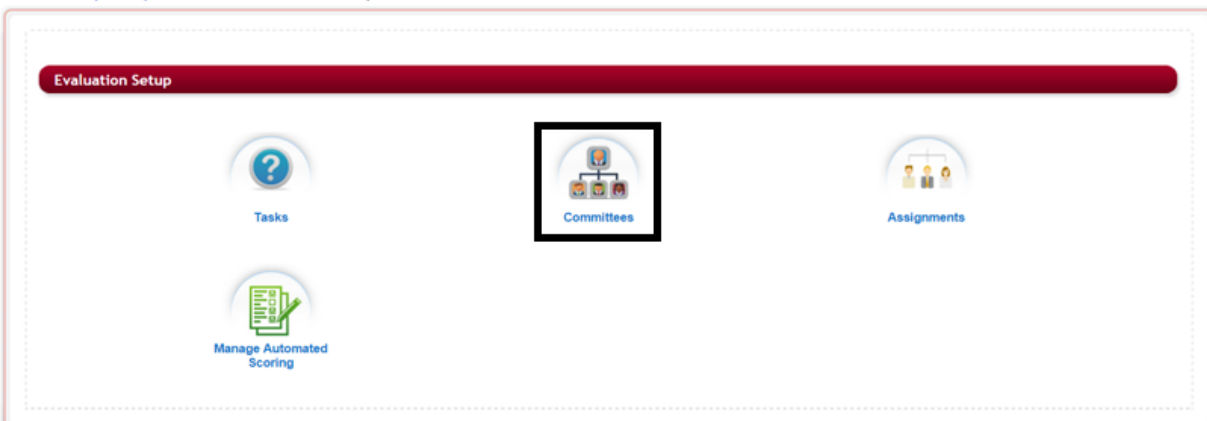
## 1.6 Adding Review Committee(s) or Group

You will need to setup the committees or groups that will be reviewing your applicants prior to assigning them to the applicants. Committees are setup on each separate application process. You will first need to create the committee name and then assign the individual members to the committees that will be reviewing them.

### Exercise 1

- **Step 1:** From the **Evaluations>Evaluation Setup** dashboard for the application form you are reviewing, select the **Committees** icon.

[Home](#) > [Evaluations](#) > [Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections](#) > [Evaluation Setup](#)



- **Step 2:** The Committees listing will appear showing any committees that have already been created for this application. If you have not created any committee this listing will be empty.
- The committee listing will show you the Committee Name, the number of members in that committee, the number of applicants assigned to the committee, the names of your committee members, and the names of the applicants that have been assigned to that committee.

Home > Evaluations > Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections > Evaluation Setup > Committees

Committee Name	Committee Members	Assigned Applicants
<a href="#">Group 1</a> Total Committee Members: 3 Total Assigned Applicants: 5	Cochran, Michael Support, CommunityForce Taylor, Kelly	Cruz, Patricia Cruz, Patricia Cruz, Patricia Gustitus, Anthony Gustitus, Anthony

- **Step 3:** To create a new Committee Group, click on **Add Committee** button.
- **Step 4:** This will open the **Create Committee** screen. Enter the Name of the Committee under the Committee Name field and click **Save and Exit**.

**Create Committee**

Save ▶ Save And Exit ▶ Cancel ▶

Committee Name :

Save ▶ Save And Exit ▶ Cancel ▶

- **Step 5:** You will be directed to **Manage Committee Members Screen** and a Status Update message will appear notifying you that the Review Committee has been updated. Click OK.

**Status Update** 196

The Review Committee has been updated.

Ok

- **Step 6:** From this screen you will start assigning the individual members to your new Committee. (See the next section How to Assign Members to a Committee.)

**Manage Committee Members**

Select Committee: Review Committee 1

**Search for Committee Members**

Users assigned to a committee must first be added to the application user list. If you don't find the reviewer you want to select, please [click here](#) to add them.

Search By:

First Name: Last Name: Email Address: Sponsoring Organization: All Search

CFTS Faculty and Staff plus non CFTS reviewers included in Manage Users

- Cochran, Michael (Michael1@Communityforce.com)
- Cochran, Michael (Michael10@Communityforce.com)
- Cochran, Michael (Michael11@Communityforce.com)
- Cochran, Michael (Michael2@Communityforce.com)
- Cochran, Michael (Michael3@Communityforce.com)
- Cochran, Michael (Michael4@Communityforce.com)
- Cochran, Michael (Michael5@Communityforce.com)
- Cochran, Michael (Michael6@Communityforce.com)
- Cochran, Michael (Michael7@Communityforce.com)
- Cochran, Michael (Michael8@Communityforce.com)
- Cochran, Michael (Michael9@Communityforce.com)
- Cooper, Amy (amy.cooper@cf.com)

Assigned Committee Member(s)

Continue ▶

### 1.6.1 How to Assign Members to a Committee

You can Assign Members to the Committee using the Manage Committee Members section of the Committee Setup. You can access this one of three ways:

1. When you first create your new committee this screen will automatically appear after you create the name of the committee and click Save and Exit.
2. While in the committees listing you can click on the Edit Icon next to the Committee that you want to add members to.

**Committees**

Add Committee Export to Excel

Committee Name	Committee Members	Assigned Applicants
<input type="checkbox"/> <a href="#">Group 1</a> Total Committee Members: 3 Total Assigned Applicants: 5	Cochran, Michael Support, CommunityForce Taylor, Kelly	Cruz, Patricia Cruz, Patricia Cruz, Patricia Gustitus, Anthony Gustitus, Anthony
<input type="checkbox"/> <a href="#">Review Committee 1</a> Total Committee Members: 0 Total Assigned Applicants: 0	No Member Assigned	No Applicants Assigned

Go to Page 1 Go Page 1 Of 1 Display 10 Records per Page

3. From the Committees listing click on the **Committee Name** which will direct you to the Edit Committee Screen. From there you can click the **Assign Members to Committee** button.

Committees			
		Add Committee	Export to Excel
<input type="checkbox"/>	Committee Name	Committee Members	Assigned Applicants
<input type="checkbox"/>	<a href="#">Group 1</a> Total Committee Members: 3 Total Assigned Applicants: 5	Cochran, Michael Support, CommunityForce Taylor, Kelly	Cruz, Patricia Cruz, Patricia Cruz, Patricia Gustitus, Anthony Gustitus, Anthony
<input type="checkbox"/>	<a href="#">Review Committee 1</a> Total Assigned Applicants: 0	No Member Assigned	No Applicants Assigned

Go to Page  Go      Page 1 Of 1      Display  Records per Page

### Edit Committee

Assign Members to Committee

Committee Name :

### 1.6.1.1 Searching for Committee Members to Add to a Committee

Once you are in the Manage Committee Members section you can search for the committee members you want to assign to a specific committee. The listing in the column to the left will show you all the existing users that you can assign to the specific committee listed in the Select Committee field. The column on the right will show the committee members that have already been assigned to this committee.

### Manage Committee Members

Select Committee:

**Search for Committee Members**

Users assigned to a committee must first be added to the application user list. If you don't find the reviewer you want to select, please [click here](#) to add them.

Search By:

First Name:	Last Name:	Email Address:	Sponsoring Organization:	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="All"/>	<input type="button" value="Search"/>

CFTS Faculty and Staff plus non CFTS reviewers included in Manage Users

- Cochran, Michael (Michael1@Communityforce.com)
- Cochran, Michael (Michael10@Communityforce.com)
- Cochran, Michael (Michael11@Communityforce.com)
- Cochran, Michael (Michael2@Communityforce.com)
- Cochran, Michael (Michael3@Communityforce.com)
- Cochran, Michael (Michael4@Communityforce.com)
- Cochran, Michael (Michael5@Communityforce.com)
- Cochran, Michael (Michael6@Communityforce.com)
- Cochran, Michael (Michael7@Communityforce.com)
- Cochran, Michael (Michael8@Communityforce.com)
- Cochran, Michael (Michael9@Communityforce.com)
- Cooper, Amy (amy.cooper@cf.com)

Assigned Committee Member(s)



**Important:** In order to assign someone to a committee they will first have to have a user profile created in the site. They will need to be at least a reviewer or have a role type that has access to the Review Applicants icon in the Home dashboard. You can add those users' profiles in the Setup Users, or while in the Committee setup. However, if you do not assign a manual password to your reviewers, you will want to notify them ahead of time that an account is being set up so that they are not alarmed when they receive the email that an account has been created.

## Exercise 2

- **Step 1:** You can use the **Search By** at the top of the Manage Committee Members screen to search for a specific user that has already had a user profile created by search on one or all the available search fields. Once the user is located their name will appear in the left column. (If their name is located skip to the next sub-section **Add a User to the Committee**, otherwise continue to Step 2).
- **Step 2:** Only users that first have been added to the CommunityForce system will appear in the listing. If you do not find the reviewer you want to select, click the **Click Here** to add that member as a user in the system.

### Search for Committee Members

Users assigned to a committee must first be added to the application user list. If you don't find the reviewer you want to select, please [click here](#) to add them.

Search By: \_\_\_\_\_

First Name: <input style="width: 90%;" type="text"/>	Last Name: <input style="width: 90%;" type="text"/>	Email Address: <input style="width: 90%;" type="text"/>	Sponsoring Organization: <span style="float: right;">All ▼</span>
			<input type="button" value="Search"/>

- **Step 3:** This will open the **Setup Users** section and you can enter the information to create a new user account for the committee member. If this user will only be used as a reviewer to review applicants, select the Reviewer role type. Otherwise, if they are staff members that need to have additional access to other areas, be sure to select a role type that has access to the Review Applicants icon on the Home dashboard. (Click **Save and Exit** to save them as a user.)

Blackbaud ID: <input style="width: 95%;" type="text"/> *First Name: <input style="width: 95%;" type="text"/> Middle Name: <input style="width: 95%;" type="text"/> *Last Name: <input style="width: 95%;" type="text"/> *Email: <input style="width: 95%;" type="text"/> *Role Type: <span style="float: right;">Select ▼</span> Type: <span style="float: right;">CFTS ▼</span> <input type="checkbox"/> Assign Password Manually?	*Title: <input style="width: 95%;" type="text"/> *Department: <input style="width: 95%; height: 30px;" type="text"/> Work Phone: <input style="width: 95%; border-bottom: 1px solid #ccc;" type="text"/> Cell Phone: <input style="width: 95%; border-bottom: 1px solid #ccc;" type="text"/> Sponsoring Organization: <span style="float: right;">▼</span>
--	--

- **Step 4:** Once they have been added as a User you should then be able to see their name listed in the Manage Users box of the Committee Members assignment screen.

CFTS Faculty and Staff plus non CFTS reviewers included in Manage Users

- Cochran, Michael (Michael1@Communityforce.com)
- Cochran, Michael (Michael10@Communityforce.com)
- Cochran, Michael (Michael11@Communityforce.com)
- Cochran, Michael (Michael2@Communityforce.com)
- Cochran, Michael (Michael3@Communityforce.com)
- Cochran, Michael (Michael4@Communityforce.com)
- Cochran, Michael (Michael5@Communityforce.com)
- Cochran, Michael (Michael6@Communityforce.com)
- Cochran, Michael (Michael7@Communityforce.com)
- Cochran, Michael (Michael8@Communityforce.com)
- Cochran, Michael (Michael9@Communityforce.com)
- Cooper, Amy (amy.cooper@cf.com)

Assigned Committee Member(s)

Continue ►

### 1.6.1.2 Add a User to the Committee in Manage Users

After you have located the user profile for the committee member you want to add, confirm that the **Select Committee** at the top of the Manage Committee screen is the correct committee that you want to add committee members to. Click the dropdown arrow in the field to change the committee if you want to add members to another committee.

## Committee Members

Select Committee: Review Committee 1 ▼

### Exercise 3

- **Step 1:** In the **Manage Users** box to the left, select the **user's name** and click on the right directional arrow to assign the person to the committee.

CFTS Faculty and Staff plus non CFTS reviewers included in Manage Users

- Sanchez, Dave (mollydavids@comcast.net)
- Sanchez, Molly (mollydavids@inwcf.com)
- Sennett, Nancy (csennett@cf.com)
- Smith, Christine (Christine@CF.com)
- Smith, Christine (ChristineS@CF.com)
- Smith, Christine (cmssrq@gmail.com)
- Smith, Cosmo (msnsc2@verizon.net)
- Smith, Jean (jean.smith@CF.com)
- Smith, Lee (rls@cfcra.org)
- Support, CommunityForce (Support@Communityforce.com)
- Taylor, Kelly (kelly@cf.com)
- Tidd, John (jtidd26@cf.com)

Assigned Committee Member(s)

Continue ►

- **Step 2:** This will move them to the **Assigned Committee Member(s)** box to the right.

CFTS Faculty and Staff plus non CFTS reviewers included in Manage Users

- Cochran, Michael (Michael1@Communityforce.com)
- Cochran, Michael (Michael10@Communityforce.com)
- Cochran, Michael (Michael11@Communityforce.com)
- Cochran, Michael (Michael2@Communityforce.com)
- Cochran, Michael (Michael3@Communityforce.com)
- Cochran, Michael (Michael4@Communityforce.com)
- Cochran, Michael (Michael5@Communityforce.com)
- Cochran, Michael (Michael6@Communityforce.com)
- Cochran, Michael (Michael7@Communityforce.com)
- Cochran, Michael (Michael8@Communityforce.com)
- Cochran, Michael (Michael9@Communityforce.com)
- Cooper, Amy (amy.cooper@cf.com)

Assigned Committee Member(s)

- Support, CommunityForce (Support@Communityforce.com)

Continue ►

- **Step 3:** Repeat this for each user you want to add to this committee. You can select multiple users on the left by holding down the control key on your keyboard, and at the same time clicking your left mouse button to selecting multiple names. Then click the right directional arrow to move all of them to the right Assigned Committee Members column.
- **Step 4:** To remove a user from the Assigned Committee Members(s). Click on their name and click on the left directional arrow to un-assign a committee member.
- **Step 5:** Once you have assigned all your members to that committee, you can select another committee in the Select Committee, or complete the assignments, by clicking on the **Continue** to save all your selections and be directed back to the Committees listing.

CFTS Faculty and Staff plus non CFTS reviewers included in Manage Users

- Cochran, Michael (Michael1@Communityforce.com)
- Cochran, Michael (Michael10@Communityforce.com)
- Cochran, Michael (Michael11@Communityforce.com)
- Cochran, Michael (Michael2@Communityforce.com)
- Cochran, Michael (Michael3@Communityforce.com)
- Cochran, Michael (Michael4@Communityforce.com)
- Cochran, Michael (Michael5@Communityforce.com)
- Cochran, Michael (Michael6@Communityforce.com)
- Cochran, Michael (Michael7@Communityforce.com)
- Cochran, Michael (Michael8@Communityforce.com)
- Cochran, Michael (Michael9@Communityforce.com)
- Cosenza, Tonv (acosenza0522@cf.com)

Assigned Committee Member(s)

- Support, CommunityForce (Support@Communityforce.com)
- Cooper, Amy (amy.cooper@cf.com)

Continue ►

### 1.6.2 How to Edit a Review Committee or Group

- To **Edit** your **Committee Name**, click on the **Committee Name** in the Committees listing section.

**Committees**

[Add Committee](#) [Export to Excel](#)

<input type="checkbox"/>	Committee Name	Committee Members	Assigned Applicants
<input type="checkbox"/>	<a href="#">Group 1</a> Total Committee Members: 3 Total Assigned Applicants: 5	Cochran, Michael Support, CommunityForce Taylor, Kelly	Cruz, Patricia Cruz, Patricia Cruz, Patricia Gustitus, Anthony Gustitus, Anthony
<input type="checkbox"/>	<a href="#">Review Committee 1</a> Total Committee Members: 0 Total Assigned Applicants: 0	No Member Assigned	No Applicants Assigned

Go to Page  Go Page 1 Of 1 Display  Records per Page

- This will open the Edit Committee. Enter your new name and click the Save and Exit to save your changes.

**Edit Committee**

[Assign Members to Committee](#)

Committee Name :

- To **Edit** your **Committee members** assigned to a Committee from the Committees listing, click on the **Edit** icon next to the committee you want to edit.

**Committees**

[Add Committee](#) [Export to Excel](#)

<input type="checkbox"/>	Committee Name	Committee Members	Assigned Applicants
<input type="checkbox"/>	<a href="#">Group 1</a> Total Committee Members: 3 Total Assigned Applicants: 5	Cochran, Michael Support, CommunityForce Taylor, Kelly	Cruz, Patricia Cruz, Patricia Cruz, Patricia Gustitus, Anthony Gustitus, Anthony
<input type="checkbox"/>	<a href="#">Review Committee 1</a> Total Committee Members: 0 Total Assigned Applicants: 0	No Member Assigned	No Applicants Assigned

Go to Page  Go Page 1 Of 1 Display  Records per Page

- This will open the Committee Members screen. Make your adjustments and click Continue to be directed back to the Committees listing.

**Manage Committee Members**

Select Committee: Review Committee 1

**Search for Committee Members**

Users assigned to a committee must first be added to the application user list. If you don't find the reviewer you want to select, please [click here](#) to add them.

Search By:

First Name:  Last Name:  Email Address:  Sponsoring Organization: All

CFTS Faculty and Staff plus non CFTS reviewers included in Manage Users

- Cochran, Michael (Michael1@Communityforce.com)
- Cochran, Michael (Michael10@Communityforce.com)
- Cochran, Michael (Michael11@Communityforce.com)
- Cochran, Michael (Michael2@Communityforce.com)
- Cochran, Michael (Michael3@Communityforce.com)
- Cochran, Michael (Michael4@Communityforce.com)
- Cochran, Michael (Michael5@Communityforce.com)
- Cochran, Michael (Michael6@Communityforce.com)
- Cochran, Michael (Michael7@Communityforce.com)
- Cochran, Michael (Michael8@Communityforce.com)
- Cochran, Michael (Michael9@Communityforce.com)
- Cooper, Amy (amy.cooper@cf.com)

Assigned Committee Member(s)

### 1.6.2.1 How to Delete a Committee

- In the Committees listing section click the red "X" next to the Committee that you want to delete. This will delete the entire committee.

**Committees**

<input type="checkbox"/>	Committee Name	Committee Members	Assigned Applicants
<input type="checkbox"/>	<a href="#">Group 1</a> Total Committee Members: 4 Total Assigned Applicants: 5	Cochran, Michael Cooper, Amy Support, CommunityForce Taylor, Kelly	Cruz, Patricia Cruz, Patricia Cruz, Patricia Gustitus, Anthony Gustitus, Anthony
<input type="checkbox"/>	<a href="#">Review Committee 1</a> Total Committee Members: 2 Total Assigned Applicants: 0	Cooper, Amy Support, CommunityForce	No Applicants Assigned

Go to Page  Go Page 1 Of 1 Display  Records per Page

- You will receive a System Alert notifying you that the Committee members also will be deleted. Select yes if you want to delete the entire Committee.

**System Alert** 193

The Members assigned to this Committee will also be deleted. Are you sure you want to continue?

- A confirmation message will appear confirming the deletion. Click OK to return to the Edit Committee Screen.

Status Update 194

The Review Committee has been deleted.

OK

### 1.6.3 How to Export the Committee Listing to Excel

- In the Committees listing section, click the **Export to Excel** button. This will create an Excel report of the Committees list.

The screenshot shows the 'Committees' section of the application. At the top right, there are two buttons: 'Add Committee' and 'Export to Excel'. The 'Export to Excel' button is highlighted with a black box. Below the buttons is a table with the following data:

Committee Name	Committee Members	Assigned Applicants
<a href="#">Group 1</a> Total Committee Members: 4 Total Assigned Applicants: 5	Cochran, Michael Cooper, Amy Support, CommunityForce Taylor, Kelly	Cruz, Patricia Cruz, Patricia Cruz, Patricia Gustitus, Anthony Gustitus, Anthony
<a href="#">Review Committee 1</a> Total Committee Members: 2 Total Assigned Applicants: 0	Cooper, Amy Support, CommunityForce	No Applicants Assigned

At the bottom of the page, there is a pagination control showing 'Page 1 Of 1' and a 'Display 10 Records per Page' dropdown menu.

### 1.7 Allowing Committee Reviewers to See Each Other's Replies and Scores on the Same Applicant's Application

Some of our clients have had the requirement that **all** their reviewers be able to see how each of the other reviewers have replied to questions and scored applicants in the review tasks.

If you would like **all** the committee reviewers to be able to see how each of the other reviewers have scored for **all** the tasks in the review process, the **Global Admin** can set a setting in the **Administration>Site Settings: General Settings: Display Reviewer Comments on Application Summary - to Yes**. This will allow the scoring information to show on the Application Summary report that the reviewers see for each applicant as follows:

Committee Review - Sanders, Sue[mssuesand@cf.com]

<b>A. Overall Community Impact (0-40 points)</b>	
This Program improves the quality of life in Clark and Floyd Counties.*	11
This program enhances collaboration and cooperation among other organizations.*	8
This request works with or complements other community organizations in an attempt to eliminate duplication of services.*	10
There is an innovative and proactive focus to the program.*	8
Please enter any comments you would like to include, regarding the Overall Community Impact of this organization.	

Setting this to **No** in the Administration Site Settings-Display Reviewer Comments on Application Summary – will turn this functionality off and reviewers will not be able to see how the other reviewers have scored the applicant.

**Important:** This is a global setting and can only be set on a **per site basis**. This cannot be set on a per application basis. Therefore, if activated, all your application processes will allow the reviewers to see each other’s replies and scores.

### 1.8 Assignments – Assigning Applicants to Score Sheets and Reviewers

Assignments is where you will assign the selected task(s) to be completed by your review committee(s) or group(s) and then also select the applicant’s that they will be reviewing for that task(s).

Tasks can be assigned on a Committee/Group level or assigned to a committee or group based on the specific funds they are reviewing.

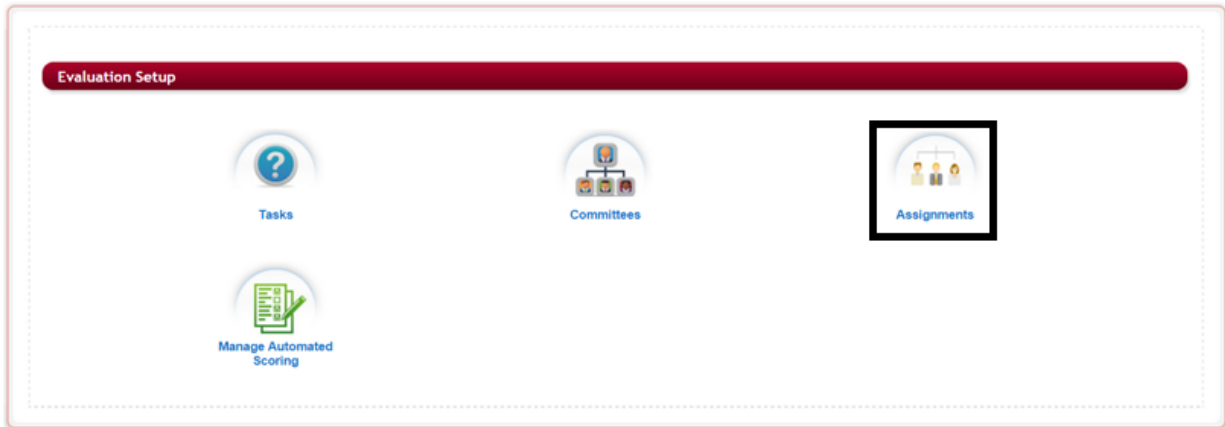
#### Exercise 1

- **Step 1:** While in the **Evaluations>Evaluations Setup** dashboard for your application, select the **Assignments** icon.



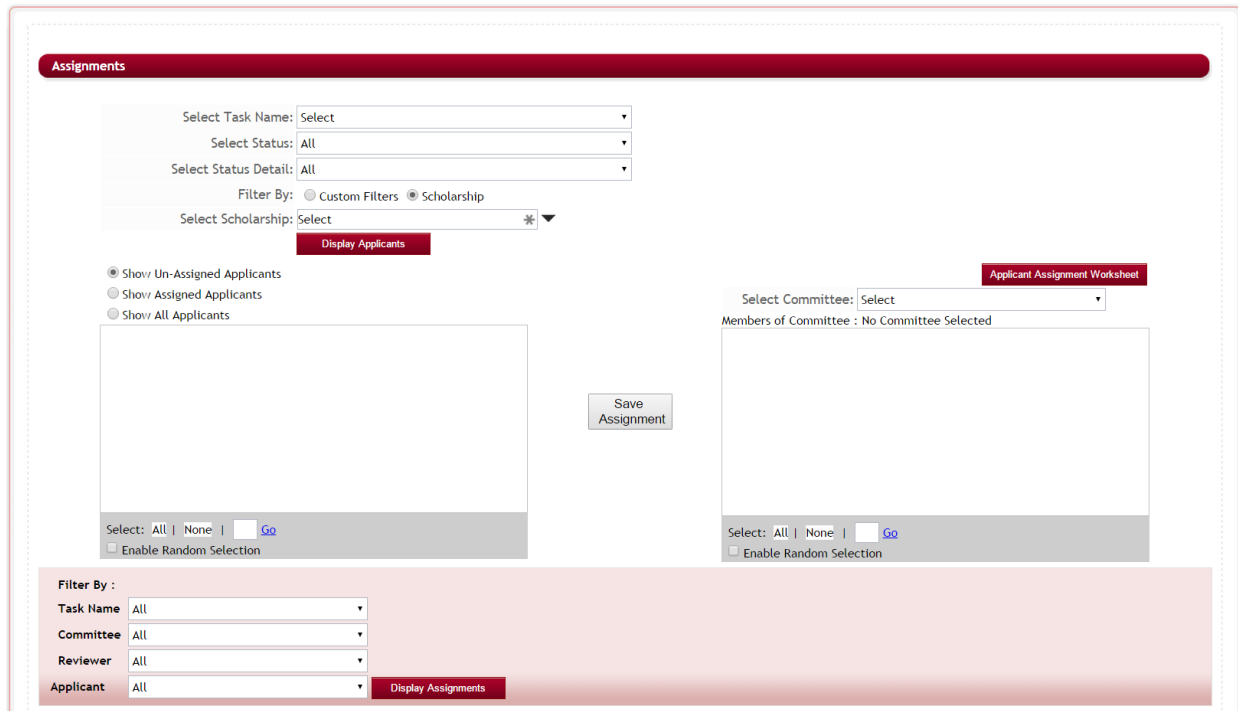
Assignments

Home > Evaluations > Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections > Evaluation Setup



➤ **Step 2:** The Assignments page will open:

Home > Evaluations > Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections > Evaluation Setup > Assignments



➤ **Step 3: Select Task Name:** Select the Task that you are wanting to assign the committee and applicant's too. Click on the dropdown arrow to view the listing of your active tasks.

**Note:** in order for a task to appear it must have the *Display on Review Reports* selected in the task's setup.



- **Step 4: Select Status:** This will filter and display only applicants set to the Status you select. If you only want applicants that are a set to specific Status to be displayed, select the current status of those applicants.

If you leave this selection as **All**, then all the applicant's will display with the exception of those that are in pending submission or withdrawn.

Use the Submitted Status and Request Pending with caution, as if selected it will only pull those applicants that show a status of "Submitted" or "Request Pending". Once an applicant is assigned in "**any**" tasks or to **another committee**, they are automatically moved to a status of "Under Committee Review". Therefore, if you are assigning applicants that may be assigned in other tasks or to other committees, then you are probably better to leave this field as All.

#### **For Example:**

You have committees that review based on individual funding source. You select the task for that funding source, and then display the applicants that meet the qualifications for that funding source. Once those applicants have been assigned they are now automatically moved to a status of "Under Committee Review". That same applicant may be eligible for additional funding sources that are part of this application process, therefore, when you go to assign a committee to that additional funding source's task, that applicant will not appear if you filter for only the "Submitted" or "Request Pending" applicants, as they have already been moved to the "Under Committee Review" status due to the prior assignment.

- **Step 5: Select Status Details:** This will filter and display only applicants set to the Status Detail you select. If you only want applicants that are a set to specific Status Detail to be displayed, select the current status detail of those applicants. This is usually set to **All**, unless you have filtered out applicants in a different review process step and have set a Status Detail on your applicants so that you know who was qualified to move on and who wasn't qualified to the next review level, then you can use this Status Detail filter to filter only those applicants that have qualified by selecting the Status Detail you created to track those applicants on that step.

Remember, these are **custom** stages and applicants are only moved to a Status Detail manually, this is not automatic.

- **Step 6: Filter By:** You can create Custom Filters or Filter By a specific funding source to display only those applicants that meet the custom filter criteria you select, or that are matched to a specific funding source.

**Custom filters:** will allow you to filter by a question that is present in your application. For example: if you only wanted a Reviewer to review Female Applicants. You could create a custom filter to fetch only Female Applicants. Once you create the filter click on the Display Applicants button. You can add as many filters as you want.

**Filter By Scholarships (funding source)** if you have a one to many application process, and are using the Matching Funds Eligibility and Manage Funds functionality to match applicants to specific funds, you can filter on the fund to display only the applicants that have been matched to those funding

sources. When filtering by Scholarship (funding source) a Dropdown Menu will appear with the list of funds that have been assigned to that application. Select only the fund(s) that will be reviewed using the task you selected, and select the only the committee that will be reviewing that specific fund.

If you have **multiple funding sources**, that are assigned **using the same tasks**, and have the **exact same committees** reviewing those funds, you can select all the funds at one time that they will be reviewing. Then all the applicants that matched to all the funds will be displayed. This will keep you from having the same applicants appearing multiple times to that same review committee, if they are using the same task to review them and the scores will not be different based on each fund. They will only need to review them one time for that one task.

Display Applicants

- Show Un-Assigned Applicants
- Show Assigned Applicants
- Show All Applicants

- **Step 7:** Before clicking on the **Display Applicants** button you will want to determine what applicants are to be display for that task. **This is on a per task basis**, not a per committee, therefore if this same task is being used to assign applicants to other committees, you will want to make sure to select the appropriate display option.

**Show Un-Assigned Applicants** – shows a listing of only the applicants, based on the filtering you set above, that have not been assigned to the selected Task. If they were assigned in this task but to a different committee, and you want to reassign applicants that may have been on that first assignment, then do not select this option, this will not display applicants if they have already been assigned to this task and therefore will not allow you to assign those same applicants to that second committee, if needed.

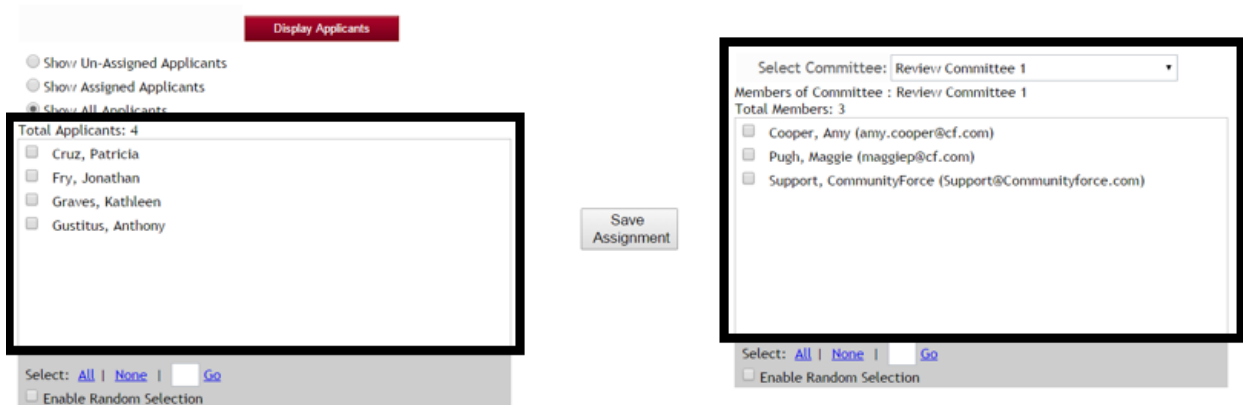
**Show Assigned Applicants**– shows a listing of all the applicants that have been assigned to the selected task, based on the filtering you set above. Select, if you want only applicants to appear **that have been assigned** to this task **already**. This **will not display** any applicants that **have not been assigned** yet to this task.

**Show All Applicants**– shows a listing of all applicants that meet the filtering you set above. This will display applicants that have already been assigned for this task and all who have not yet been assigned in this task.

There are several scenarios to take into consideration before you begin to filter students.

- 1) **1:1** Application simply filter and assign to your committee.
- 2) **1:Many** Application process - If you are assigning by funds, and applicants are eligible for multiple funds, you will need to filter by Show all Applicants if the same task is being used on the other funds with different committees.

- **Step 8:** After you have completed filtering and sorting applicants, Click the **Display Applicants** button, the applicant's names will appear in the box on the left along with the total number of applicants that appears in the box.



- **Step 9: Select the Committee** in the Select Committee drop down, that you will be assigning to these applicants. All the committee members, and the number of members assigned to that committee will appear in the box to the left.

- **Step 10:** To assign, you will need to select the applicants on the left that you want to assign to the committee members on the right. Then click the **Save Assignment** in the middle to save that assignment. You can do the selection multiple ways:

1. All applicants get assigned to every committee member:
  - a. At the bottom of both boxes click on the **Select All**. A checkmark will be placed next to every applicant, and a checkmark will be placed next to every committee member. When you click the **Save Assignment**, every applicant will be assigned to every single committee member.

Select: [All](#) |

2. If you only want to assign a few at a time to each committee member select only those applicants for that one committee member and then select only that one committee members. Click the **Save Assignments** for each batch.
3. You don't want every committee member to review every applicant, but divide the applicants equally across the committee members so that each review an equal amount of applicants and the applicants are reviewed by an equal amount of reviewers. (I.e. three applicants to three committee members, but each applicant get three reviews.)
  - a. You select the applicants on the left and then select only the reviewers on the right that you want to review that set of applicants, click the save assignments. Then repeat for the next batch, etc., selecting only those to be reviewed and only the committee members that will be reviewing.

4. You want to have the system randomly check a specific number of applicants and/or randomly select a specific number of committee members to assign those applicants to.
  - a. Select the Box next to the **Enable Random Selection** at the bottom of the Applicant listing and enter the number of applicants you want to be assigned randomly in the **blank select field** next to the Go, and click **Go**. Do the same for the Committee listing. The system will then automatically check that number of applicants and/or check that number of committee members. Click the Save Assignments to save that selection. Repeat for each batch.

Show Un-Assigned Applicants  
 Show Assigned Applicants  
 Show All Applicants

Total Applicants: 4

- Cruz, Patricia
- Fry, Jonathan
- Graves, Kathleen
- Gustitus, Anthony

Select Committee: Review Committee 1

Members of Committee : Review Committee 1  
Total Members: 3

- Cooper, Amy (amy.cooper@cf.com)
- Pugh, Maggie (maggiep@cf.com)
- Support, CommunityForce (Support@Communityforce.com)

Select: [All](#) | [None](#) |  [Go](#)

Enable Random Selection

Select: [All](#) | [None](#) |  [Go](#)

Enable Random Selection

**Note:** Once you have assigned applicants to a committee member their *Status* will automatically be changed to **“Under Committee Review”**.

- **Step 11:** After the assignments have been completed, each individual assignment will appear in the listing at the bottom of the page. This will show the Task assigned, the applicants current Status and Status Detail, the Committee group and the what reviewer in that group was assigned that applicant.

Filter By :

Task Name All

Committee All

Reviewer All

Applicant All

---

No of Assignments : 6

<input type="checkbox"/>	Task	Task Name	Status	Status Detail	Committee	Applicant	Reviewer Name	Last Notification
<input type="checkbox"/>	1	Initial Review by Staff	Under Committee Review	Final Award	Group 1	Cruz, Patricia	Cochran, Michael	
<input type="checkbox"/>	1	Initial Review by Staff	Under Committee Review	Final Award	Group 1	Cruz, Patricia	Taylor, Kelly	
<input type="checkbox"/>	1	Initial Review by Staff	Under Committee Review	Final Award	Group 1	Gustitus, Anthony	Taylor, Kelly	
<input type="checkbox"/>	1	Initial Review by Staff	Under Committee Review	Final Award	Review Committee 1	Cruz, Patricia	Cooper, Amy	
<input type="checkbox"/>	4	Score Sheet 2	Under Committee Review	Final Award	Group 1	Cruz, Patricia	Support, CommunityForce	
<input type="checkbox"/>	6	Score Sheet 3	Under Committee Review	Final Award	Group 1	Gustitus, Anthony	Support, CommunityForce	

Select: [All](#) | [None](#)

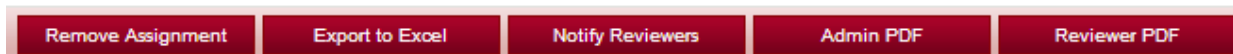
Go to Page  Go ← Page 1 Of 1 → Display  Records per Page

Filter By :	
Task Name	All ▼
Committee	All ▼
Reviewer	All ▼
Applicant	All ▼
<a href="#">Display Assignments</a>	

If you wish to change the view of the grid below you can Filter By:

**Task Name**  
**Committee**  
**Reviewer**  
**Applicant**

Click on Display Assignments and the grid below will show applicants based on your filters.



The following workflow functions can be performed for the applicants in the grid:

**Remove Assignment** – from the grid you can remove an assignment from a reviewer

**Export to Excel** – export the grid to excel

**Notify Reviewers** – customize an email template will appear for you to send to your reviewers letting them know you have assigned applicants for them to review

**Admin PDF** – generate an Admin PDF of an application(s)

**Reviewer PDF** – generate a Reviewer PDF of an application(s)

### 1.8.1 Notifying Reviewers that Applicants are Ready for Review.

After you have made the assignments you will need to notify your reviewers that they have applicants waiting to be reviewed. You can do this notification in the Assignments section.

**Important:** Prior to notifying your reviewers you will want to confirm that you have the **Display to Reviewer** selected to “yes” on all the tasks that your reviewers will need to be reviewing if this is not selected and shows as “no” then the reviewers will not be able to see the tasks in their dashboard.

#### Exercise 1

- **Step 1:** In the Evaluations>Evaluation Setup dashboard, open the Assignments section for the application that is ready for review.
- **Step 2:** Scroll to the bottom section where it shows the assignments that have been made. In the Reviewer Name Column locate the reviewers you need to notify. Put a check in the box next to that assignment that has the reviewer’s name and then click on the Notify Reviewers button. You can select multiple reviewers at a time to send a batch of notification emails.

**Note:** if the reviewer has multiple assignments you only need to select their name once.

Filter By :

Task Name: All  
Committee: All  
Reviewer: All  
Applicant: All

Display Assignments

No of Assignments : 6

Remove Assignment | Export to Excel | **Notify Reviewers** | Admin PDF | Reviewer PDF

<input type="checkbox"/>	Task	Task Name	Status	Status Detail	Committee	Applicant	Reviewer Name	Last Notification
<input checked="" type="checkbox"/>	1	Initial Review by Staff	Under Committee Review	Final Award	Group 1	Cruz, Patricia	Cochran, Michael	
<input checked="" type="checkbox"/>	1	Initial Review by Staff	Under Committee Review	Final Award	Group 1	Cruz, Patricia	Taylor, Kelly	
<input type="checkbox"/>	1	Initial Review by Staff	Under Committee Review	Final Award	Group 1	Gustitus, Anthony	Taylor, Kelly	
<input type="checkbox"/>	1	Initial Review by Staff	Under Committee Review	Final Award	Review Committee 1	Cruz, Patricia	Cooper, Amy	
<input checked="" type="checkbox"/>	4	Score Sheet 2	Under Committee Review	Final Award	Group 1	Cruz, Patricia	Support, CommunityForce	
<input type="checkbox"/>	6	Score Sheet 3	Under Committee Review	Final Award	Group 1	Gustitus, Anthony	Support, CommunityForce	

Select: All | None

Go to Page 1 Go Page 1 Of 1 Display 20 Records per Page

- **Step 3:** This will open up the email notification box. You can create your own email message or select in the template field the email template: **Committee: Applications are ready for review.**

Schedule The Email | Send Now | Preview | Cancel

\*From: admin@communityforce.com

\*To: Support@Communityforce.com;

Mail Format: HTML

\*Subject: Student Grants: Applications are ready for your review

**Email Template: Committee: Applications are ready for review**

\*Body:

Available Merge Fields

Reviewer First Name {Reviewer First Name}  
Reviewer Last Name {Reviewer Last Name}  
Reviewer Email {EmailID}  
Applicant FirstName {FirstName}  
Applicant LastName {LastName}

Grants/Fellowship Name {Grants/Fellowships Name}  
Application Name {Application Name}

Dear {Reviewer First Name} {Reviewer Last Name}:  
Thank you once again for agreeing to review applicants for the {Grants/Fellowships Name}.

Please contact me at {Contact Email} or call me at {Contact Phone} if you have any questions or if I can provide any assistance. Lisa Biever is also available to provide technical support to our volunteer reviewers. She may be reached at [lisa.biever@cfrr.org](mailto:lisa.biever@cfrr.org) or at 540-273-0202 ext. 121

Schedule The Email | Send Now | Preview | Cancel

- **Step 4:** Click on the Send now to sent the email at that time, or you can click on the Schedule the Email to have it sent at a later date and time.
- **Step 5:** The email will then be sent to all the reviewers you had selected.

### 1.8.2 Remove Assignment from a Reviewer(s)

**Caution:** Removing an assignment will remove any scoring the reviewer has done on that applicant.

- **Step 1:** To remove an assignment or multiple assignments first filter the list by Task Name, Committee and Reviewer. Click on Display Applicants.

Filter By :

Task Name: Committee Review  
 Committee: Application Review Committee  
 Reviewer: Allen-Test, Veronica (veronica.allen)  
 Applicant: All

Buttons: Display Assignments, Remove Assignment, Export to Excel, Notify Reviewers, Admin PDF, Reviewer PDF

<input type="checkbox"/>	Task	Task Name	Status	Status Detail	Committee	Applicant	Reviewer Name	Last Notification
<input type="checkbox"/>	1	Committee Review	Under Committee Review		Application Review Committee	Ellsworth, Carly	Allen-Test, Veronica	
<input type="checkbox"/>	1	Committee Review	Additional Info Requested		Application Review Committee	Fry, Jonathan	Allen-Test, Veronica	
<input type="checkbox"/>	1	Committee Review	Under Committee Review		Application Review Committee	Martin, Juliet	Allen-Test, Veronica	

Select: [All](#) | [None](#)

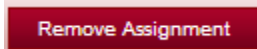
Go to Page 1 Go Page 1 Of 1 Display 20 Records per Page

- **Step 2:** Place a checkmark in the student you wish to remove or use the Select: All|None feature.

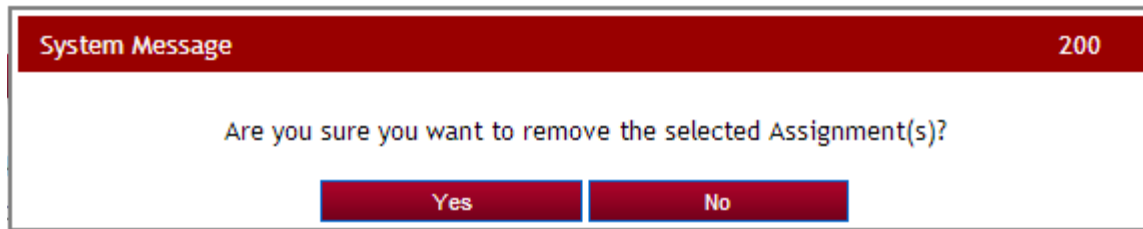
<input checked="" type="checkbox"/>	Task	Task Name	Status
<input checked="" type="checkbox"/>	1	Committee Review	Under Co
<input checked="" type="checkbox"/>	1	Committee Review	Additional
<input checked="" type="checkbox"/>	1	Committee Review	Under Co

Select: [All](#) | [None](#)

- **Step 3:** Once you have selected your applicants Click on the Remove Assignment Button



- **Step 4:** A System Message confirmation will appear, select Yes to remove the selected Assignments.



**Note:** Do not delete a Reviewer from a committee or their assignments once you have assigned them to an applicant. Deleting or removing the assignment will delete any scoring they may have entered on a applicant.

If you are certain they have not scored their assigned applicants, first remove the assignment and then go into the Committee setup and delete the reviewer from that committee.

### 1.9 Automatic Assignment of Applicants

Automatic Assignment of Applicants, allows you to have the system automatically assign applicants to the committees for specific tasks. You can have all the applicants assigned or have filters to assign applicants that meet a certain criteria automatically assigned. (This is best used on a one to one application process when you are only reviewing one application and awarding one funding source)

In the automatic assignment, you would choose the task, choose the committee, and then all the applicants that have submitted will automatically be assigned or you can choose to select a filter based on a pre designed ad hoc report you have created to filter specific applicants for assignment to a specific task.

If you have multiple stages to your review process, you have the option to assign tasks that are dependent on other tasks being accomplished first. If a task is dependent on another task, reviewers in the second review would not be able to review an applicant until the first review was completed.

The use of the Automatic Assignment of Applicants feature is a **universal site feature not a per application option**. If selected **all application forms** will have to use the Automatic Assignment, and the ability to use the manual version where you get to select what applicants gets assigned to what task will not be available.

**Important:** Prior to using the Automatic Assignment feature you **Global Administrator** will need to set the **Administration>Site Setting: General Settings: Automatic Assignment of Applicants** to "yes".

Once this is activated you would click on the **Assignments icon** in the **Evaluation Setup** dashboard for the application you are assigning.

If you want to be able to pull applicants based on a specific criteria filter(s) to assign to a single task, you will need to first create an **Ad Hoc Report** in the **Evaluations>Reports>Ad Hoc reports**. This report will need to pull on the same filter criteria conditions that you want to be filtered on for your task's assignment.



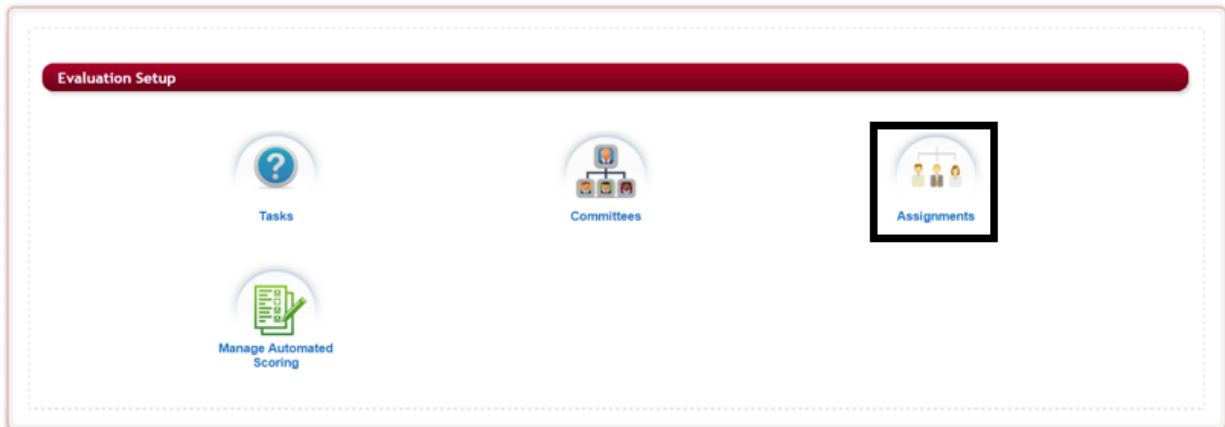
## Exercise 1

- **Step 1:** While in the **Evaluations>Evaluations Setup** dashboard for your application, select the **Assignments** Icon.



Assignments

Home > Evaluations > Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections > Evaluation Setup



- **Step 2:** The Task Assignment Report page will open showing any task(s) that currently have been assigned, or if none have been assigned then it will be empty.

Home > Evaluations > Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections > Evaluation Setup > Task Assignment Report



- **Step 3:** To create a new assignment click on the **Create New Task Assignment** button.

Create New Task Assignment

- **Step 4:** The Create Task Assignment will screen open:

Create Task Assignment

\* Select Task :

\* Select Committee :

Response(s) Required :  All Responses  Any One Response

Select Committee Member		Selected Committee Members
<div style="border: 1px solid gray; height: 100px;"></div>	<input type="button" value=" &gt;&gt;"/> <input type="button" value=" &lt;&lt;"/>	<div style="border: 1px solid gray; height: 100px;"></div>
Select : <a href="#">All</a>   <a href="#">None</a>		Select : <a href="#">All</a>   <a href="#">None</a>

- **Step 5:** Select the task you want to assign by clicking the drop down arrow in the Select task field and clicking on your task.
- **Step 6:** Select the committee to be assigned to this task by clicking the drop down arrow in the Select Committee field. This will populate the Select Committee Member column.

\* Select Task :

\* Select Committee :

Response(s) Required :  All Responses  Any One Response

- **Step 7:** Responses(s) Required: If you have mutiple tasks to review, the other tasks will not be available to review until:

**All Responses:** All Responses in the prior tasks must be completed before the applicants will appear in the next level task for reviewers to see them for review.

**Any One Response:** The prior task can be started, but not completed, before the applicants will appear in the next level task for reviewers to see them for review.

- **Step 8:** In the **Select Committee Member** column select all the committee members to be assigned to this task, and click the right directional arrow to move them to the **Selected Committee Members** Column. Use the left directional arrow to move them back to the select committee member if you do not want to assign that committee member.

The image displays two sequential screenshots of a 'Select Committee Member' dialog box. In the top screenshot, the 'Select Committee Member' list contains three items: 'Cooper, Amy (amy.cooper@cf.com)', 'Smith, Christine (Christine@CF.com)', and 'Support, CommunityForce (Support@Communityforce.com)'. The '>>' button is highlighted with a red box. The 'Selected Committee Members' list is empty. In the bottom screenshot, the 'Select Committee Member' list now only contains 'Cooper, Amy (amy.cooper@cf.com)'. The 'Selected Committee Members' list contains 'Support, CommunityForce (Support@Communityforce.com)' and 'Smith, Christine (Christine@CF.com)'. Below the dialog boxes are 'Next' and 'Cancel' buttons.

- **Step 9:** Click **Next** to go to the next page. This page will ask if there are any dependent task that must be **completed prior** to this task appearing to the reviewers.

**Yes** – there are tasks to be completed before this task

**No** – there are **not tasks** that need to be completed prior to activating this task.

- If you Select **Yes**, the following screen will appear: (if **No** skip to Step 12)

## Create Task Assignment

Has Task Dependency :  Yes  No ←

Select Task :

- Review Task 1 aa ←
- Review Task 3 aa
- Arvin McCord Score Card aa

Select : [All](#) | [None](#)

Response(s) Required :  All Responses  Any One Response ←

Previous Next Cancel

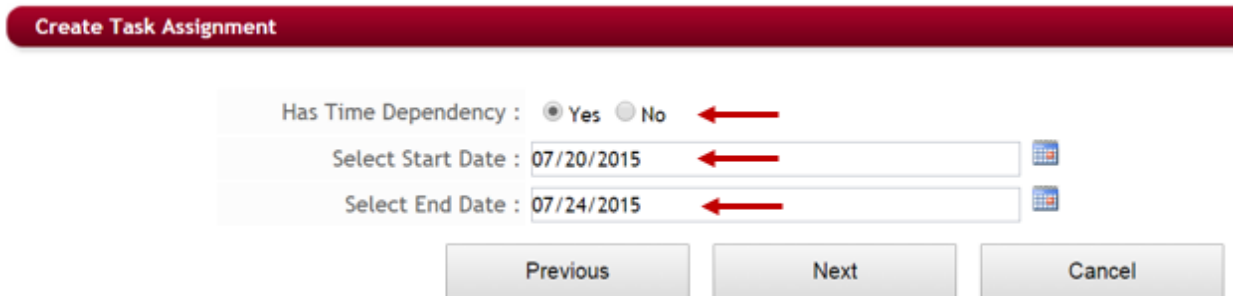
- **Step 10:** Select all the task(s) that must be completed prior to this task appearing to reviewers. (i.e. you have three tasks and this is task three however task 1 and task 2 must be completed, select task 1 and task 2 since they must both be completed prior to this task appearing).
- **Step 11:** For the Dependent task(s) do all responses have to be completed in those prior task(s) or just one before showing this tasks to reviewers. Select the one that applies to your task.
  - All Responses:** All Responses in the prior tasks must be completed before the applicants will appear in the next level task for reviewers to see them for review.
  - Any One Response:** The prior task can be started, but not completed, before the applicants will appear in the next level task for reviewers to see them for review.
- **Step 12:** Click Next to continue to the next page.

## Create Task Assignment

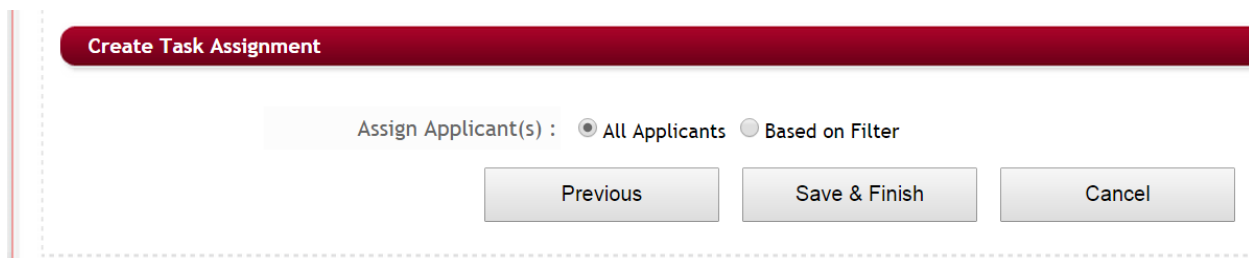
Has Time Dependency :  Yes  No

Previous Next Cancel

- **Step 13:** Does the task have a time frame for completion. (Start and end date to complete)
- **Note:** The task will only be available to complete for the dates that the time dependency is set. If there are tasks that are to be completed after this task and this first task is not completed by the deadline date the dependent tasks will not open if All responses are required in the first.)
- If you select **Yes**, the following screen will open, (If you select **No**, skip to Step 16)



- **Step 14:** Enter the start date that this task is to appear for review.
- **Step 15:** Enter the End Date that the task is to be completed by (deadline date).
- **Best Practice tip:** If you want the dependent tasks to open immediately after the first task is completed, go ahead and make your start and end dates the same dates, so that there is not a delay, from one to the next.
- **Step 16:** Click **Next** to continue, and open the next page.
- **Step 17: Assign Applicant(s).** How do you want to assign your applicants.



**All Applicants:** If all the applicants that applied that are Submitted or Request pending are to be assigned click the all Applicants. (if this is selected continue to Step 19).

**Based on Filter:** If you have created an **Ad Hoc report** to filter out the applicants to be assigned for this task select the **Based on Filter**. When you select this option the **Select a Report** will appear:

- **Step 18:** Select the ad hoc report in the Select a Report dropdown listing that will filter only the applicants you want to assign to this task.
- **Step 19:** Click **Save & Finish**.
- **Step 20:** The applicants will then be assigned to that task based on your selections and you will return to Task Assignment Report screen.

Edit	Delete	Task Name	Responses Required	Task Dependency	Dependant Tasks	Reviewer Name
		Arvin McCord Score Card aa	Any One Response	No	No Dependant Tasks	Smith, Christine Support, CommunityForce
		Review Task 1 aa	Any One Response	No	No Dependant Tasks	Smith, Christine Support, CommunityForce
		Review Task 2 aa	Any One Response	Yes	Review Task 1 aa	Smith, Christine Support, CommunityForce

You will now be able to see in this report screen all the tasks you have assigned and if any are dependent on other tasks.

You can click on the **Edit icon** to edit a task or click the red **"X"** next to a task to delete. Use caution when editing or deleting tasks that have been assigned out already for review, as you will lose any data that reviewers have entered if you change that reviewer or delete the task completely.

### 1.10 Introduction to Automated Scoring

Automated Scoring is a feature that allows you to create scoring based on replies to specific questions. You would need to assign a score to a question and based on the answer given by the applicant, the system automatically computes the score and assigns them back to the applicant.

The applicant's automated score is a combined total of all the scores set in the automated scoring section that they have meet the criteria for and not an average. The automated score will show as a separate score and is not calculated into the Total Score that you see, when reviewing and awarding your applicants.

There are two main screens used in Automated Scoring

1. Manage Automated Scoring – To set up the scores.
2. Automated Scoring Report – To review all the applicants and see their automated scoring scores.

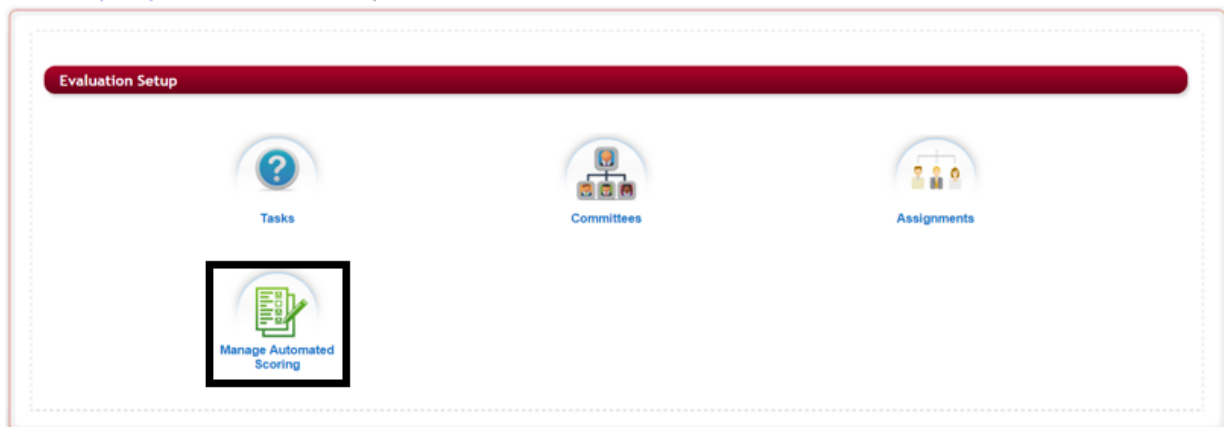
### 1.10.1 Manage Automated Scoring

Allows you to set automated scoring criteria for different questions in the application by adding a specific score to a reply value that is calculated on, if the applicant answers the question with the value that meets the criteria for that score.

#### To create automated scoring:

- **Step 1:** While in the Evaluations Setup dashboard for your application, select the **Manage Automated Scoring** icon

Home > Evaluations > Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections > Evaluation Setup



- **Step 2:** The **Manage Automated Scoring** screen is displayed showing the questions that currently have automated scoring set on them.

Edit	Delete	Sub Condition	Section	Mapping Field	Condition	Value	Conjunction	Group	Score
		<a href="#">View</a>	Academic Honors	Year Awarded	like	Grade 10			98.00
		<a href="#">View</a>	Additional Information	Additional information essay	equals	no			45.00

**Overview of Manage Automated Scoring report listing:**

- **Section:** The section that has the question that score will be set up on
- **Sub Condition** – If the words “view” are present in this column the scoring has sub condition scores as well.
- **Mapping Field:** The name of the Question that the score is set up on
- **Condition:** The condition of the value selected, that is to be met to add the score.  
Possible conditions are:
  - *Contains* – the answer/value contains this value
  - Starts With - the answer/value starts with this value
  - Does Not Contain - the answer/value does not contains this value
  - Is Not Empty - the answer/value is not empty (applicant has answered this question)
  - Is Empty - the answer/value field is empty (applicant has not answered this question)
  - Is Exactly – the answer/value must exactly match the value.
  - Is Less Than - the answer/value is numeric and is less than the value amount
  - Is Equal To - the answer/value is numeric and is equal to the value amount
  - Is Greater Than - the answer/value is greater than the value amount
  - Is Not Equal to - the answer/value is numeric and is not equal to the amount.
- **Value:** The reply the applicant must answer in order to get the score
- **Conjunction: Used with sub conditions only** this can have two values “AND” or “OR”, and will be populated if the score is based on more than one question and has sub conditions.
- **Group: Used with sub conditions only.** This column groups for your sub conditions. You may have several groups of condition where the first group is executed and then the second group is executed etc. Assign each of the sub conditions in a group with the same number. The first group is 1; the second group is 2, etc.
- **Score:** The score that will be given for this question if answered according to the parameters set.

➤ **Step 3:** To create a new automated score, click on the **Create Automated Scoring Criteria** button.



➤ **Step 4:** The Manage Automated scoring set up page will open



### Manage Automated Scoring

The screenshot shows a form titled "Manage Automated Scoring". At the top, there are three buttons: "Save", "Save And Exit", and "Cancel". Below these are five fields, each with a red arrow pointing to it:

- \*Section : --Select-- (dropdown menu)
- \*Type of Field : -Select- (dropdown menu)
- \*Condition : -Select- (dropdown menu)
- \*Score : (text input field)
- \*Has Sub Condition :  Yes  No (radio buttons)

At the bottom of the form, there are three buttons: "Save", "Save And Exit", and "Cancel".

- **Step 5: Section:** Select the Section that contains the question you want to set the score on.
- **Step 6: Mapping Fields:** Select the name of the question that the score will be set up on.
- **Step 7: Type of Field:** This is a read only field and gets auto filled based on the type of question that you select in Mapping Fields.
- **Step 8: Condition:** set the condition type of the field  
Possible conditions are:
  - *Contains* – the answer/value contains this value
  - *Starts With* - the answer/value starts with this value
  - *Does Not Contain* - the answer/value does not contains this value
  - *Is Not Empty* - the answer/value is not empty (applicant has answered this question)
  - *Is Empty* - the answer/value field is empty (applicant has not answered this question)
  - *Is Exactly* – the answer/value must exactly match the value.
  - *Is Less Than* - the answer/value is numeric and is less than the value amount
  - *Is Equal To* - the answer/value is numeric and is equal to the value amount
  - *Is Greater Than* - the answer/value is greater than the value amount
  - *Is Not Equal to* - the answer/value is numeric and is not equal to the amount.
- **Step 9: Value:** This field will appear based on the Type of Field you selected. Enter the answer the applicant must answer in order to get the score. The value will need to be entered exactly as it was entered by the applicant. (I.e. a drop down listing value, must be the same value that was entered in the dropdown.)

\*Value :

VA

- **Step 10: Score:** Enter the score that the value will receive
- **Step 11: Has Sub condition:** Set this to yes, to set up a score based on “and” or “or” Conditions with other questions within the application. Meaning they have to meet both or at least one of the conditions to get the score. When you return to the Manage Automated Scoring listing this question will show a “View” in the Sub Condition column. You will add the sub-condition by clicking on that “View”.
- **Step 12:** Click **Save and Exit** to return to the automated scoring listing.

Manage Automated Scoring									
									Create Automated Scoring Criteria
Edit	Delete	Sub Condition	Section	Mapping Field	Condition	Value	Conjunction	Group	Score
		<a href="#">View</a>	Academic Honors	Year Awarded	like	Grade 10			98.00
		<a href="#">View</a>	Additional Information	Additional information essay	equals	no			45.00
			General Information	State	equals	VA			5.00

**Example:** You want to give a score of 5 points if the applicant lives in Virginia – When completing the “General Information” section the applicant would need to select the “State” “VA”.

You would set up the automated score as shown below:

## Manage Automated Scoring

Save ► Save And Exit ► Cancel ►

\*Section : General Information ▼

\*Mapping Fields : State ▼

\*Type of Field : String ▼

\*Condition : Equals ▼

\*Value :  
VA

\*Score : 5

\*Has Sub Condition :  Yes  No

Save ► Save And Exit ► Cancel ►

**1.10.2 Setting Sub-conditions on automated scores**

- **Step 1:** When creating the initial question select “Yes” for the “Has Sub Condition”.

Manage Automated Scoring

\*Section :


\*Mapping Fields :

\*Type of Field :

\*Condition :

\*Value :

\*Score :

\*Has Sub Condition :  Yes  No 

- **Step 2:** Once you save that question and return to the Manage Automated Scoring the word “View” will appear in the Sub Condition column.

Manage Automated Scoring Create Automated Scoring Criteria

Edit	Delete	Sub Condition	Section	Mapping Field	Condition	Value	Conjunction	Group	Score
		<a href="#">View</a>	Additional Information	Additional information essay	equals	no			10.00
			FASFA EFC Information	EFC as reported on your Student Aid Report	minmax	13000 - 13999			25.00
			FASFA EFC Information	EFC as reported on your Student Aid Report	minmax	14000 - 14999			20.00
		<a href="#">View</a>	General Information	State	equals	VA			5.00

- **Step 3:** Click on the **View** for the question you are adding the sub condition to.
- **Step 4:** The listing of sub conditions for this question will appear, or it will be blank if you have not yet added a sub condition.

Automated Scoring Sub Conditions

No Fund Criteria Added Yet.

Create Automated Scoring sub Criteria

- **Step 5:** Click on the **Create Automated Scoring Sub Criteria** button to add a sub condition.

Create Automated Scoring sub Criteria

- **Step 6:** The Automated Scoring Sub Conditions page will open:

- **Step 7: Section:** Select the Section that contains the question you want to set the score on.
- **Step 8: Mapping Fields:** Select the name of the question that the score will be set up on.
- **Step 9: Type of Field:** This is a read only field and gets auto filled based on the type of question that you select in Mapping Fields.
- **Step 10: Condition:** set the condition type of the field  
Possible conditions are:
  - *Contains* – the answer/value contains this value
  - *Starts With* - the answer/value starts with this value
  - *Does Not Contain* - the answer/value does not contains this value
  - *Is Not Empty* - the answer/value is not empty (applicant has answered this question)
  - *Is Empty* - the answer/value field is empty (applicant has not answered this question)
  - *Is Exactly* – the answer/value must exactly match the value.

- Is Less Than - the answer/value is numeric and is less than the value amount
- Is Equal To - the answer/value is numeric and is equal to the value amount
- Is Greater Than - the answer/value is greater than the value amount
- Is Not Equal to - the answer/value is numeric and is not equal to the amount.

➤ **Step 11: Value:** This field will appear based on the Type of Field you selected. Enter the answer the applicant must answer in order to get the score. The value will need to be entered exactly as it was entered by the applicant. (I.e. a drop down listing value, must be the same value that was entered in the dropdown.)

\*Value :

VA

➤ **Step 12: Conjunction:** is this Value to be met as “and” or “or”. (For Example: They have to live in the state of Virginia “and” in the County of Stafford in order to get the score. If “or” was selected then either/or would be the case to get the score.)

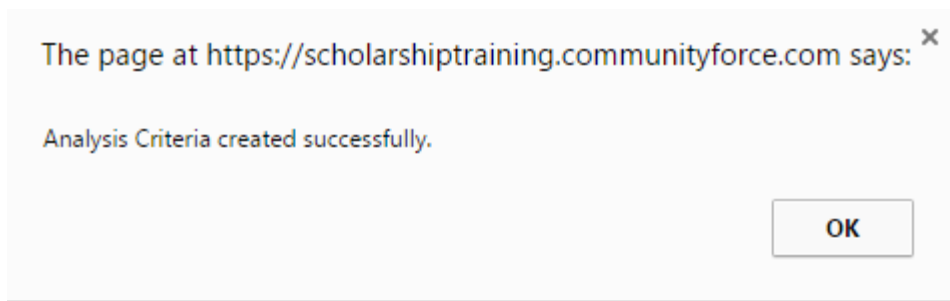
**Step 13: Group:** This groups your conditions into sets of conditions. You may have several groups of condition where the first group is executed and then the second group is executed etc. Assign each of the conditions in a group the same number. The first group is 1, the second group is 2, etc.

➤ **Step 14: Order:** The order in the grouping that this should occur.

➤ **Step 15: Score:** Enter the score that the value will receive if sub condition is met.

➤ **Step 16:** Click Save and Exit. To return to the Sub criteria’s page.

➤ **Step 17:** You will get the following message that the Criteria was created successfully. Click OK.



Automated Scoring Sub Conditions									
Edit	Delete	Section	Mapping Field	Condition	Value	Conjunction	Groups	Order	Score
		General Information	City or County:	equals	Stafford	And	1	1	15.00

[Create Automated Scoring sub Criteria](#)

- **Step 18:** To return to the Manage Automated Scoring, click on the Manage Automated Scoring in the breadcrumb navigation at the top of the page.

Home > Evaluations > Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections > Evaluation Setup > **Manage Automated Scoring** > Automated Scoring Sub Conditions

### 1.10.3 To Edit an Automated Score

- While in the Mange Automated Scoring or in the Sub – Condition setup click on the Edit icon next to the Score you want to edit.
- This will open the scoring setup and you can make your appropriate changes to the question. Be sure to click Save or Save and Exit to save any change you may make.

Manage Automated Scoring									
									Create Automated Scoring Criteria
Edit	Delete	Sub Condition	Section	Mapping Field	Condition	Value	Conjunction	Group	Score
	✗	<a href="#">View</a>	Academic Honors	Year Awarded	like	Grade 10			98.00
	✗	<a href="#">View</a>	Additional Information	Additional information essay	equals	no			45.00
	✗		General Information	State	equals	VA			5.00

### 1.10.4 To Delete an Automated Score

- While in the Mange Automated Scoring or in the Sub – Condition setup click on the Edit icon next to the Score you want to edit.

Manage Automated Scoring									
									Create Automated Scoring Criteria
Edit	Delete	Sub Condition	Section	Mapping Field	Condition	Value	Conjunction	Group	Score
	✗	<a href="#">View</a>	Academic Honors	Year Awarded	like	Grade 10			98.00
	✗	<a href="#">View</a>	Additional Information	Additional information essay	equals	no			45.00
	✗		General Information	State	equals	VA			5.00

- You will receive a confirmation message, and then a Successful deletion message, click ok on both to complete the deletion.

The page at <https://scholarshiptraining.communityforce.com> says: ✕

Are you sure, you want to delete selected record?

OK

Cancel

The page at <https://scholarshiptraining.communityforce.com> says: ✕

Criteria has been deleted Successfully.

Prevent this page from creating additional dialogs.

OK