



**Scholarship Management System**  
**Module 11 – Managing Committee Reviews and Scores**  
**Training Guide**  
**Ver 7.5**  
**Updated on: 7/2015**

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### Module 11 – Managing Committee Reviews and Scores

This module will review how to monitor the completion of review tasks, as well as how to view the scores given by the reviewers to the applicants. You will also learn how to review the scores that were given to applicants based on automated scoring.

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# 1. Managing Committees Reviews and Scores

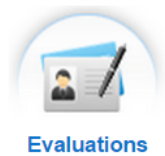
## 1.1 Evaluate Applicants

Evaluate Applicants allows you to monitor the evaluation process to see which tasks have been completed by your review committee members as well as review the scores given to applicants based on the scoring tasks and the automated scoring question. (The Awarding will be covered in another module please see that module for additional information on how to award your applicants.)

## 1.2 Accessing the Evaluate Applicants Dashboard

The Evaluate Applicants dashboard allows you to evaluate the applicants that have been assigned to committee reviewers and review task.

- **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.



- **Step 2:** This will direct you to the Evaluations 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

Evaluations

Search By:


Application Form:  Scholarship:  Sponsoring Organization:  Search

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.

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

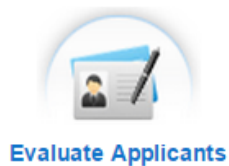


Section Release

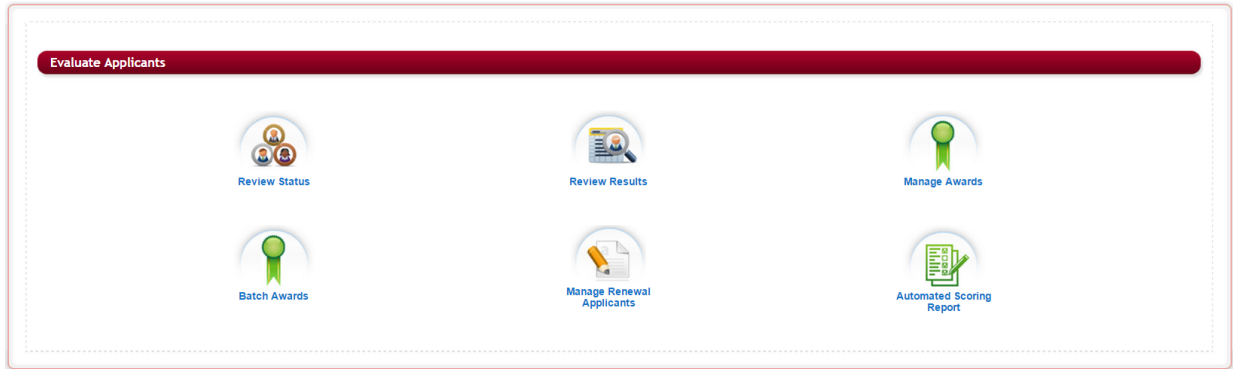


Notification Center

➤ **Step 4:** Click on the **Evaluate Applicants** Icon



➤ **Step 5:** The following **Evaluate Applicants** Dashboard will appear:



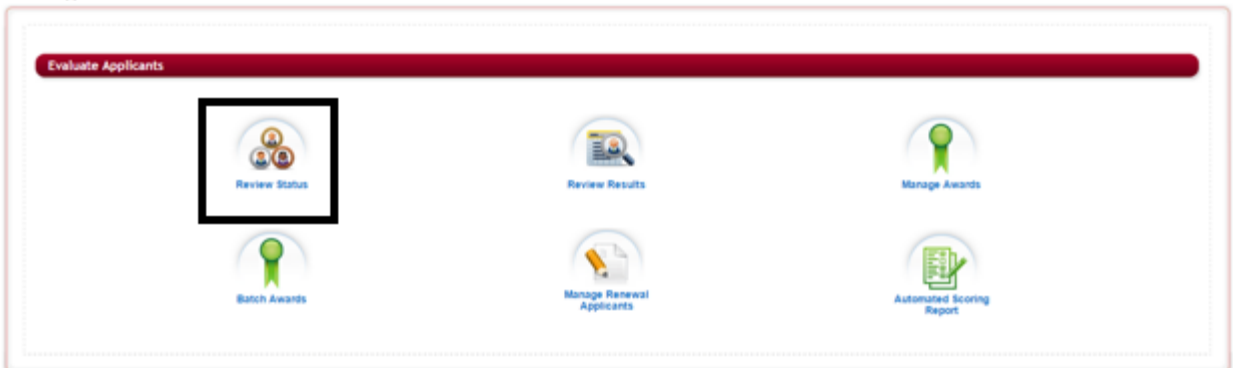
### 1.3 Review Status – Introduction

Review Status allows you to see the status of the specific **tasks** you have set up in your review process. In the Review Status you are able to view each active task and see how far the reviewers have gotten in reviewing their applicants. You can see how many applicants the reviewers have completed and what still needs to be completed.

- **Step 1:** From the **Evaluations>Evaluate Applicants** dashboard for the application you are reviewing, select the Review Status Icon.



Review Status



- **Step 2:** The Review Status report page will open:

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

Review Status				
Total Number Of Applicants: 17				
Task	Task Name	Number of Assignments	Incomplete	Complete
1	<a href="#">Initial Review by Staff</a>	0	0	0
2	<a href="#">Arvin McCord Score Sheet</a>	2	2	0
3	<a href="#">Aaron Kessler Score Sheet</a>	6	6	0

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

### Review Status report features

**Task** – The task number that was assigned to the sort order of this task

**Task Name** – The name of the task

**Number of Assignments** – The total number of review assignments in that task. This is not the count per applicant it is the count for the total of reviewer assignments. (I. e. you have three separate reviewers assigned to two applicant – this would equal six assignments)

**Incomplete** and **Complete** – Shows the number of the assignments that have been accomplished by the reviewers.

- **Step 3:** Click on the individual Task Name to see details on the individual applicants assigned in that task and the individual scoring given by each reviewer for that applicant.

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

Review Status				
Total Number Of Applicants: 17				
Task	Task Name	Number of Assignments	Incomplete	Complete
1	<a href="#">Initial Review by Staff</a>	0	0	0
2	<a href="#">Arvin McCord Score Sheet</a>	2	2	0
3	<a href="#">Aaron Kessler Score Sheet</a>	6	6	0

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

- **Step 4:** The **Applicant Score Card (All Applicants)** will open showing all the applicants and the current status of each review for that applicant.

Applicant Score Card (All Applicants)									
Score Sheet	View Application	Applicant	Email	Blackbaud ID	Committee	Reviewer Name	Completed	Score	Lock/Unlock Documents
		Cruz, Patricia			Aaron Kessler Review Committee	Smith, Christine	0 %	0	
		Cruz, Patricia			Aaron Kessler Review Committee	Support, CommunityForce	17 %	10	
		Graves, Kathleen			Aaron Kessler Review Committee	Smith, Christine	0 %	0	
		Graves, Kathleen			Aaron Kessler Review Committee	Support, CommunityForce	0 %	0	
		Gustitus, Anthony			Aaron Kessler Review Committee	Smith, Christine	0 %	0	
		Gustitus, Anthony			Aaron Kessler Review Committee	Support, CommunityForce	0 %	0	

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

### Applicant Score Card (All Applicants)

In the applicant score card each applicant is listed multiple times according to the number of Reviewers assigned to them.

**Score Sheet** – Clicking on the score sheet next to each applicant’s name allows you to see how the reviewer in that Committee Group answered the task specific questions for that applicant.

**View Application** - Clicking on the View Application will allow you to view the **Application Summary** of the Applicant and any required attached documents that were included in their application process.

**Applicant** – Clicking on the Applicant’s name will allow you to open and view the applicant’s application dashboard.

**Email** – The applicant’s email address

**Committee** – The name of the committee that the assigned reviewer is a member of

**Reviewer Name** – The name of the reviewer reviewing the applicant

**Completed** – The total percentage completed that the specific reviewer has completed for that specific applicant on that task.

**Score** – The individual reviewer’s total score that they gave to that specific applicant on that task.

**Lock/Unlock Documents** – Allows you to view the documents without having to open the application summary.

- Click on the Lock Icon to open the listing of attached documents. You can then click on each individual document to open and view it. Click **Save and Exit** to return to the Applicant Score Card (All Applicants).

Document Title	Question	Date Uploaded
High_School_Transcript.pdf	High School Transcript	4/1/2014 6:05:41 AM
SAR_file.pdf	Upload the Summary of your SAR	4/1/2014 6:10:59 AM

**Export To Excel:** Allows you to export to Excel the Applicant Score Card (All applicants) report.

### 1.3.1 Assuming the Reviewers Identity

There may be times that a reviewer may request the administrator to make an adjustment to their score or enter the scores online for them. From the Review Status report there is the option to Select the Reader, change your login to the actual reviewers and make those needed adjustments for them.

- **Step 1:** From the **Evaluations>Evaluate Applicants** dashboard for the application you are reviewing, select the Review Status Icon.

Review Status

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

Evaluate Applicants

- Review Status
- Review Results
- Manage Awards
- Batch Awards
- Manage Renewal Applicants
- Automated Scoring Report

- **Step 2:** The Review Status report page will open:



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

Review Status				
Total Number Of Applicants: 17				
Task	Task Name	Number of Assignments	Incomplete	Complete
1	<a href="#">Initial Review by Staff</a>	0	0	0
2	<a href="#">Aryn McCord Score Sheet</a>	2	2	0
3	<a href="#">Aaron Kessler Score Sheet</a>	6	6	0

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

- **Step 3:** Click on the “Select Reader” located at the top of the Review Status page.
- **Step 4:** The Select Reader page will open showing all the reviewers assigned to tasks on that application.

Select Reader					
	Net ID	Last Name	First Name	Email	Role
<a href="#">Switch</a>		Smith	Christine		Global Admin
<a href="#">Switch</a>		Smith	Christine	Christine@CF.com	Reviewer

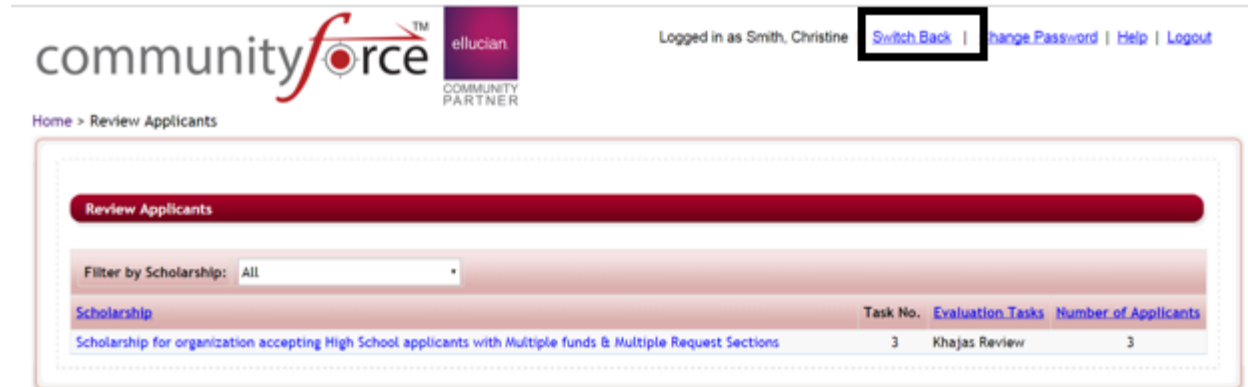
- **Step 5:** Locate the name of the reviewer you want to assume identity on, and click on the word “Switch” that is located to the left of their name.
- **Step 6:** You are now logged in as that reviewer, viewing their actual Review Applicants page.

Home > Review Applicants

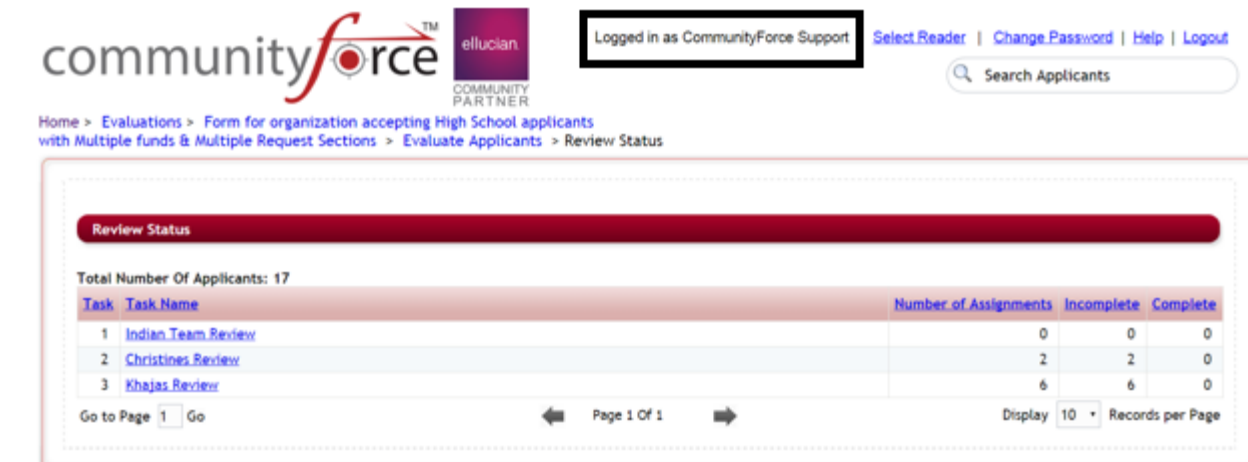
Review Applicants			
Filter by Scholarship: <input type="text" value="All"/>			
Scholarship	Task No.	Evaluation Tasks	Number of Applicants
Scholarship for organization accepting High School applicants with Multiple funds & Multiple Request Sections	3	Khajas Review	3

- You also will notice at the top of the page that the “Logged in “will now show as that reviewer.

- **Step 7:** Click on the tasks you want to edit for that reviewer and make any changes you need to make on their behalf. Be sure to remember to click save to save any changes you make.
- **Step 8:** Once you are done making the changes, you will need to click on the **Switch Back** at the top of the page, to change the logged in user back to yourself.



- **Step 9:** You can confirm that you are back to your personal log in by looking at the top of the page and seeing that your login is now once again showing as the Logged in user.



## 1.4 Review Results - Introduction

**Review Results** allows you to view the average scoring total results **per applicant**.

**Very Important:** When viewing scores in the Review Results it is important to remember that the scores you are viewing are the combined average scores for **all tasks** that are currently turned on, and have the box checked to Display on Review Reports – “yes” in the **Evaluation Setup>Tasks setup**. That means, if you have two separate tasks that are currently marked to display on the review reports, and are looking at the Review Results report, you will see the average total for *both of those tasks* and that total will be the combined total of all the reviewers that reviewed in both tasks. Therefore, if you are wanting to

only see the scores on one task, keep that task checked to “Display on Review Reports, but on all the other tasks you will need to uncheck that box “Display on Review Reports”, leaving only the one task you want to review as checked.

**Example:**

You are looking at the Review Results totals, however you have two tasks that are marked active and “Display on Review Reports is checked – “yes”

Task 1 – had 3 reviewers with a total score (not average yet) of **60** points

Task 2 – had 3 reviewers with a total score (not average yet) of **90** points

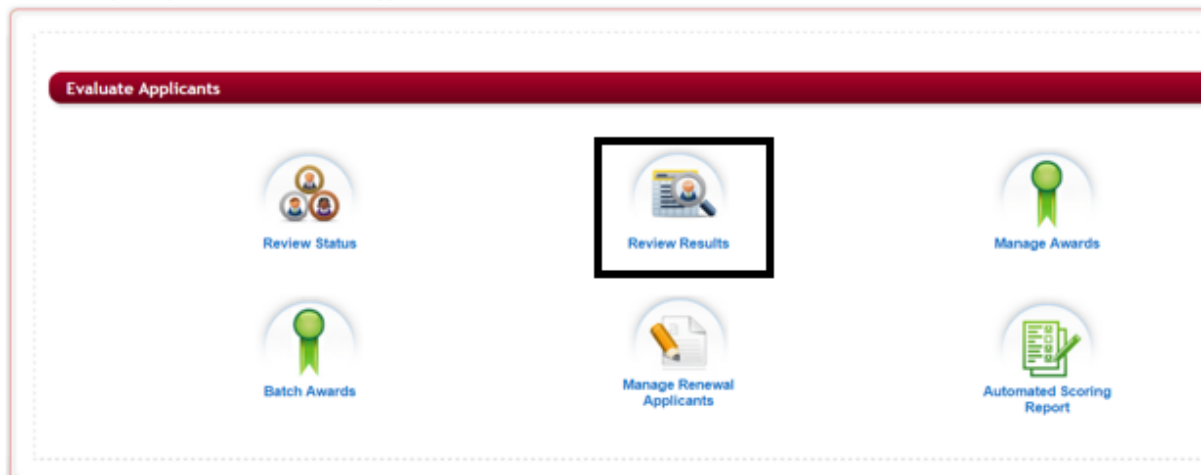
The Review Results average score for that applicant will be 25.  $(60+90)/6=25$

- **Step 1:** From the **Evaluations>Evaluate Applicants** dashboard for the application you are reviewing, select the **Review Results** icon.



**Review Results**

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



- **Step 2:** Once you click on Review Results the following screen appears:

Review Results

Search By: Last Name:  First Name:  Email:  Blackbaud ID:  Search

---

Filter by Status: All ▼ Change Status to:  ▼ Change Applicant Status

Filter by Status Detail: All ▼ Change Status Detail to: Select ▼ Change Applicant Status Detail

---

Number Of Applicants: 5 Export to Excel Notify Admin PDF Reviewer PDF

	View Application	Applicant	Blackbaud ID	Completed	Avg Score	Status	Status Details	Reviewer Comments
<input type="checkbox"/>	<a href="#">↗</a>	Arbo, Kiley			N/A	Withdrawn		
<input type="checkbox"/>	<a href="#">↗</a>	Cruz, Patricia		100%	22.50	Under Committee Review	Final Award	
<input type="checkbox"/>	<a href="#">↗</a>	Fry, Jonathan			N/A	Request Pending		
<input type="checkbox"/>	<a href="#">↗</a>	Graves, Kathleen		50%	15.50	Under Committee Review		
<input type="checkbox"/>	<a href="#">↗</a>	Gustitus, Anthony		50%	19.50	Under Committee Review	Final Award	

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

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

The Search by and Filter by Status/Status Detail features on this page are used just the same as the features in the **Evaluations>Applicant Status** report, however this report will show only those applicants that are in the submitted state and are not in the Pending Submission status. If you would like to see a specific status or applicant you can use the Search by or Filter by Status section to locate those applicants.

### Review Results Features:

**Search By** - Allows you to search for a specific applicant in the listing.

**Filter by Status** - Allows you filter on a specific status to only see applicants of a specific status. (You can only view applicants that have been at least assigned in the review process, submitted and pending submission applicant will not appear at this stage of the process)

**Filter by Status Detail** - Allows you filter on a specific status detail to only see applicants of a specific status detail (you can only view applicants that have at least been assigned in the review process, submitted and pending submission applicant will not appear at this stage of the process)

**Change Status to** - Allows you to change the status of a specific applicant.

**Change Applicant Status Detail** - Allows you to change the status detail of a specific applicant.

To change an applicant’s status or status detail you must first filter by the Status/Status Detail the applicant is currently categorized as. Then check the box to the left of their name and then select the status or status detail you want to move them to under the Change Applicant Status or Status Detail section, click one of the “Change Applicant Status” buttons accordingly. You can change this for one applicant or multiple.

**Number of Applicants** – Total number of applicants in the Review process that are in the specific filter of Status/Status detail. If Status/Status detail is set to all this is the total number of applicants for all statuses.

**Export to Excel** – Creates an excel export of the Review Results report grid as you are currently viewing it.

**Notify** – Allows you to send a Notification email to a specific applicant, by checking the check box next to the applicant's name and then clicking the Notify button.

**Admin PDF** – A PDF document of the applicant's application along with all attached documents that has all sections available for the administrator's to view.

**Reviewer PDF** – A PDF document of the applicant's application along with all attached documents. Only the sections/question that have been to be shown to the reviewers will appear in the PDF document.

**View Application** – Opens the application Summary document of the applicant and shows all the required uploaded documents for you to view individually.

**Applicant** - Clicking on the **Applicant** name will direct you to that applicant's application dashboard.

**Completed:** That percentage completed by all reviewers across all tasks that are active and have the "Display on Review Reports" selected.

**Avg. score** - Shows the applicant's final average score card for the applicant showing the score for all the Tasks the applicant was scored on.

- **Note:** This is an average of the total scores across **all task** and divided by the total number of **all reviewers** assigned in **all the task**.

**Status-** current status of the applicant in the application process

**Status Detail** – user defined status/stage of the applicant in your review process

**Reviewer Comments** – the questions in your tasks that were marked as "Scoring Comment" when created will be included as the Reviewer Comments field.

- **Step 3:** To view the details on the applicant's score and to see how the individual reviewers scored the applicant, click on the **Avg. Score** to open the **Applicant Score Card**.

**Review Results**

Search By: Last Name:  First Name:  Email:  Blackbaud ID:  [Search](#)

Filter by Status: All [Change Status to:](#)  [Change Applicant Status](#)

Filter by Status Detail: All [Change Status Detail to:](#) Select [Change Applicant Status Detail](#)

Number Of Applicants: 5 [Export to Excel](#) [Notify](#) [Admin PDF](#) [Reviewer PDF](#)

<a href="#">View Application</a>	<a href="#">Applicant</a>	<a href="#">Blackbaud ID</a>	Completed	<b>Avg Score</b>	Status	<a href="#">Status Details</a>	<a href="#">Reviewer Comments</a>
<input type="checkbox"/>	<a href="#">Arbo, Kiley</a>			N/A	Withdrawn		
<input type="checkbox"/>	<a href="#">Cruz, Patricia</a>		100%	22.50	Under Committee Review	Final Award	
<input type="checkbox"/>	<a href="#">Fry, Jonathan</a>			N/A	Request Pending		
<input type="checkbox"/>	<a href="#">Graves, Kathleen</a>		50%	15.50	Under Committee Review		
<input type="checkbox"/>	<a href="#">Gustitus, Anthony</a>		50%	19.50	Under Committee Review	Final Award	

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

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

- **Step 4:** This will open the Applicant’s Score card showing the results of each active task and how the reviewers scored the applicant in those tasks.

**Applicant Score Card**

Filter By Task Name: All [Search](#) [View Application](#) [Admin PDF](#) [Reviewer PDF](#) [Export to Excel](#)

Applicant Name: Cruz, Patricia

Task	Task Name	Reviewer	Email	Complete	Total Score	Scoring Comment
<input type="checkbox"/>	5 <a href="#">Kessler Score Card</a>	Smith, Christine	Christine@CF.com	100 %	20	
<input type="checkbox"/>	5 <a href="#">Kessler Score Card</a>	Support, CommunityForce	Support@Communityforce.com	100 %	25	
Total Score:					45.00	

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

**Filter By Task Name** – Allows you to filter on a specific task to see only the data on that task only.

**View Application** – Opens the application Summary document of the applicant, and shows all the required uploaded documents for you to view individually.

**Admin PDF** – A PDF document of the applicant’s application along with all attached documents that has all sections available for the administrator’s to view.

**Reviewer PDF** – A PDF document of the applicant’s application along with all attached documents. Only the sections/question that have been to be shown to the reviewers will appear in the PDF document.

**Export to Excel** – Exports the Applicant Score Card report to an excel document

**Task** – The task number that was assigned to the sort order of this task

**Task Name** – The name of the task. **Clicking** on the specific task name will open the score sheet for that reviewer and show how they scored the individual questions in that task.

**Reviewer** – The actual reviewer assigned to the applicant on that task

**Email** – The reviewer’s email address.

**Complete** – The total percentage completed that that specific reviewer has completed for that specific applicant on that task.

**Total Score** – The total score given by the specific reviewer on that specific task.

**Clicking** on the specific score will open the score sheet for that reviewer and show how they scored the individual questions in that task.

**Scoring Comment** – The scoring comment (if included as part of your score card task) of the specific reviewer on the specific task.

- **Step 5:** To return to the Review Results report, click on the “Review Results” located in the breadcrumbs navigation at the top of the page.

Home > Evaluations > Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections > Evaluate Applicants > Review Results > Applicant Score Card



### **Best Practice Tip:**

Note if you have multiple tasks being reviewed concurrently and are needing to be able to see the scores on completed tasks, and cannot turn the other tasks off due to reviews still being performed in those tasks, you may be better off running ad hoc reports to review your results for a single task, create each report and include the scoring section in the report, then filter the report in the filter set up on the individual task. This will give you only the scoring information on that task. If these tasks are based on a per fund basis, and you are using the Matching fund eligibility to match applicants to those funds, you also can select the specific task that goes with the fund, when viewing the fund in the Manage Awards section. (See the Managing Awards training module for more details on how to review using Manage Awards).

#### **1.4.1 Create Ad Hoc Report for scoring results**

**Note:** *This is a brief overview on how to create an Ad Hoc scoring report, for a more in depth detail on creating reports please - See the Reports Training Module*

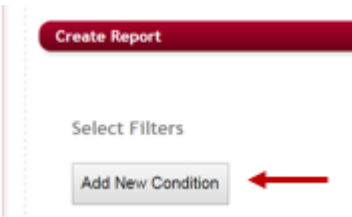
- **Step 1:** In the Evaluations>Reports Open the Ad Hoc Reports for the application you are reviewing.





- **Step 6:** Click on Save & Next to go to the next page
- **Step 7:** Select the individual columns to include in the report. You can select specific questions from the applicant's application, as well as select specific questions that the reviewers scored on in the task card if you want to see each reviewer's individual scores for the applicant. (Make sure to pull the Application Data – Status and Status Detail, so that you will have those columns to filter on once the report is completed.)

- **Step 8:** Click Save and Next
- **Step 9:** Click the Add New Condition button



➤ **Step 10:** Select the Filter to filter on the actual task

**Arvin McCord - Arvin-McCord Scholarship Scoring Report**

Select Filters

Report Item	Section Name	Field Name	Filter	Filter Value	Group
✖ Score Card Information	Score Card Information	Task Name	Contains	Arvin McCord Scoresheet	1

Remove All Conditions

Previous Finish Cancel

- **Report Item:** Score Card Information
- **Section Name:** Score Card Information
- **Field Name:** Task Name
- **Filter:** Contains
- **Filter Value:** Click the actual Task name that you want to see the results for

➤ **Step 11:** Click Finish to return to the report list.

**Ad Hoc Reports**

Update Reporting Database Create New Report Export to Excel

Edit	Delete	Report Name	Report Description	Visibility	Updated On	Copy	View
	✖	Application Details	Listing of all the application Fields	ALL	07/14/2015 15:07		
	✖	Application Details - 6/29/2015 6:27:17 PM	Listing of all the application Fields	ALL	07/14/2015 15:07		
	✖	Arvin McCord - Arvin-McCord Scholarship Scoring	Used for reviewing score results by the Arvin McCord review task.	ALL			
	✖	Bradley Fund Report	Criteria Report	ALL	07/14/2015 15:07		
	✖	Bradley Fund Report - 5/13/2015 12:59:36 PM	Criteria Report	ALL	07/14/2015 15:07		
	✖	Braswell Fund Report	Criteria Report	ALL	07/14/2015 15:07		
	✖	High School	High School	ALL	07/14/2015 15:07		
	✖	test		Me	07/14/2015 15:07		

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

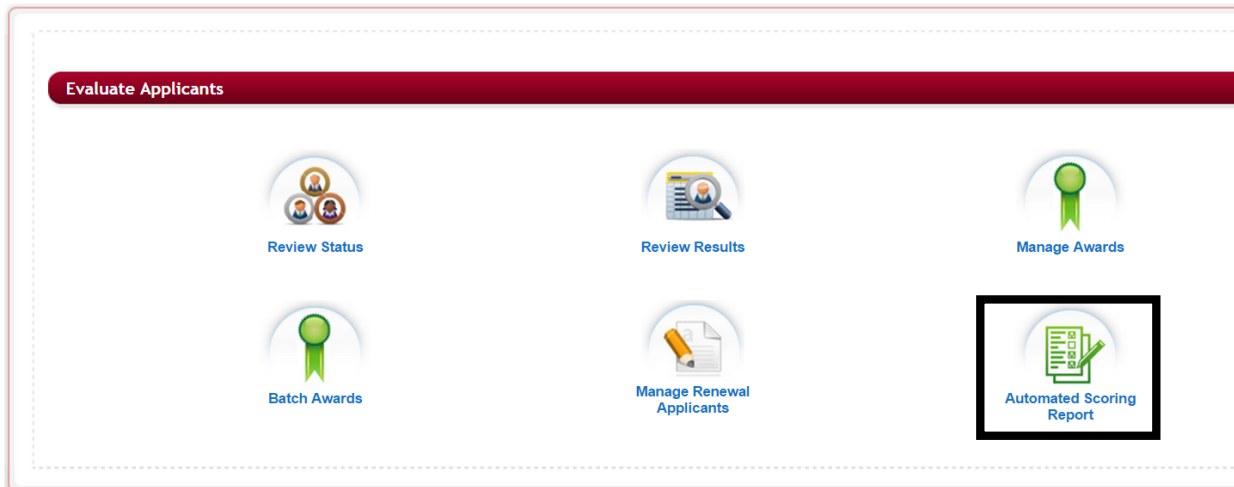
➤ **Step 12:** Once you are at the report list remember to first click the Update Reporting Database button. Then once the database has updated, locate the report you just created and click on the View icon located to the right of that reports name to open the report. Once you open the report it can be exported to Excel.

## 1.5 Automated Scoring Report

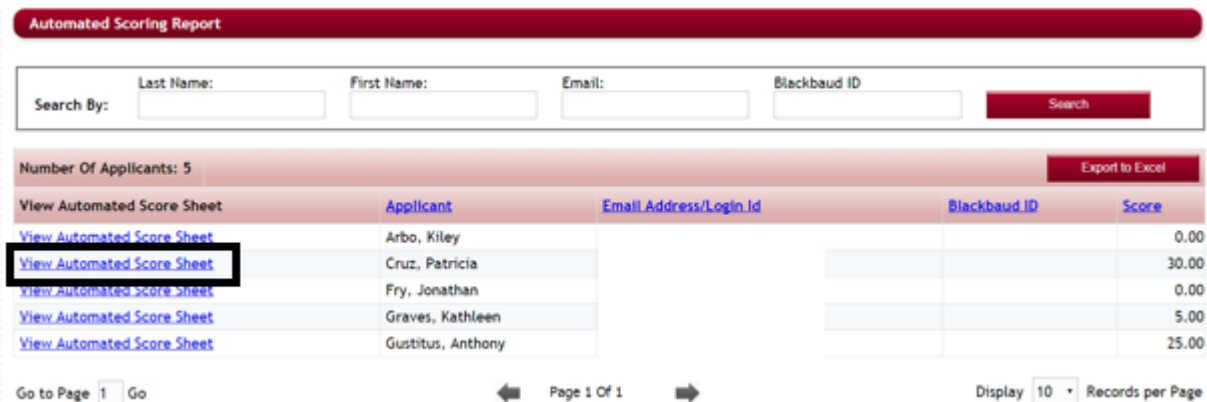
The Automated Scoring Report allows you to view the results for the scores based on automated scoring set on questions within the application using the Manage Automated Scoring setup feature.

- **Step 1:** From the **Evaluations>Evaluate Applicants** dashboard for the application you are reviewing, select the **Automated Scoring Report** icon.

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



- **Step 2:** The Automated Scoring report will open showing all the applicants that have submitted their applications and the automated score total for that applicant.



- **Step 3:** To see the breakdown of the individual automated scores given to each applicant, click on the **View Automated Score Sheet** listed to the left of the applicant's name.

Automated Scoring Sheet

Number of records: 3

Applicant Name: Cruz, Patricia

Section	Question	Answer	Score
Additional Information	Additional information essay		0.00
FASFA EFC Information	EFC as reported on your Student Aid Report	13991	25.00
General Information	State	VA	5.00
<b>Total Score:</b>			<b>30</b>

- **Step 4:** This will show the individual score the applicant received for each automated scoring question that was set in the Automated Scoring setup.
- **Step 5:** To return to the Automated Scoring Report click on the Automated Scoring Report 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 > Evaluate Applicants > Automated Scoring Report > Automated Scoring Sheet