



**Scholarship Management System**  
**Training Guide**  
**Module 12 – Reviewing Applicants and Scoring – Reviewers**  
**Dashboard**  
**Ver 7.5**  
**Updated on: 7/2015**

Prepared by:

## Table of Contents

### Module #12 – Reviewing Applicants and Scoring – Reviewers Dashboard

This training module will show how the **applicant reviewer** will view their assigned applicant’s application, supporting materials and complete the score sheet for a specific Evaluation Task. This process is the same for any role type that has been assigned applicants to review.

1.	CONDUCTING APPLICANT REVIEWS – SCORING .....	3
1.1	INTRODUCTION TO REVIEW APPLICANTS .....	3
1.2	ACCESSING THE REVIEW APPLICANTS PAGE .....	3
1.3	REVIEWING THE APPLICANTS’ APPLICATION AND SCORE SHEET .....	5
1.4	ADDITIONAL PUSH SCORES OPTION FOR REVIEWERS.....	8

# 1. Conducting Applicant Reviews – Scoring

## 1.1 Introduction to Review Applicants

**Note to Administrator:** All role types that will be assigned applicants to review in the evaluation setup process will need to have access to the **Review Applicants Icon** on their Home Dashboard. If a user profile is created with the **Reviewer** role type they will automatically be directed to the Review Applicants page and will not have the Icon.

### Review Applicants:

Review Applicants allows the applicant reviewer to see the review task(s) assigned to them and the applicants that they have been assigned to review in that task. The applicant reviewer can then click on the applicants they have been assigned to view that applicant’s application form and answer the review questions and/or score the applicants on the required scoring tasks.

## 1.2 Accessing the Review Applicants Page

Depending on the role type given to you when your user profile was created, when you log in you will be directed either to your Home Dashboard or directly to the Review Applicants page.

- **Step 1:** If directed to your **Home** dashboard you will need to click on the **Review Applicants Icon**. (**Note:** If when logging in you were directed to the Review Applicants page, you will not need to click on this icon as you will already be in the Review Applicants section.)



### Review Applicants

- **Step 2:** You should now see the **Review Applicants** page, listing the application and the tasks you have been assigned to review.

Review Applicants			
Filter by Scholarship: All			
Scholarship	Task No.	Evaluation Tasks	Number of Applicants
Scholarship for organization accepting Graduates based on Merit and Financial need	1	Merit Score	2
Scholarship for organization accepting Graduates based on Merit and Financial need	2	Financial Need Score	2
Scholarship for organization accepting High School applicants with Multiple funds & Multiple Request Sections	2	Arvin McCord Score Sheet	1
Scholarship for organization accepting High School applicants with Multiple funds & Multiple Request Sections	3	Aaron Kessler Score Sheet	3
Scholarship for organization with multiple funds accepting Adult Learners	1	Review for Completeness	2

**Scholarship (funding source) Name** - This is the name of the application form you are assigned to review.

**Task No.** - There may be multiple tasks involved in the evaluation review process, the Task no. shows the number of the task or sequence that the task appears to the administrators.

**Evaluation Tasks** – This is the name of the task that is being performed, this may be titled as a specific review committee name, a review step in the process, or the name of the actual funding source you may be asked to review.

**Number of Applicants** - The number of applicants’ that have been assigned to you for review for the assigned task.

- **Step 3:** To view the applicants you have been assigned in a specific task, click on the Fund (Scholarship) name that is listed in the same row as the task you have been assigned.

Scholarship	Task No.	Evaluation Tasks	Number of Applicants
Scholarship for organization accepting Graduates based on Merit and Financial need	1	Merit Score	2
Scholarship for organization accepting Graduates based on Merit and Financial need	2	Financial Need Score	2
Scholarship for organization accepting High School applicants with Multiple funds & Multiple Request Sections	2	Arvin McCord Score Sheet	1
Scholarship for organization accepting High School applicants with Multiple funds & Multiple Request Sections	3	Aaron Kessler Score Sheet	3
Scholarship for organization with multiple funds accepting Adult Learners	1	Review for Completeness	2

- **Step 4:** This will display the listing of all the Applicants for the specific task assignment.

Blackbaud ID	Applicant	Percentage Completed	Score	Scoring Comment
	<a href="#">Cruz, Patricia</a>	0 %		
	<a href="#">Graves, Kathleen</a>	0 %		
	<a href="#">Gustitus, Anthony</a>	0 %		

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

This listing shows all the applicants assigned to you for that Task along with the current **Percentage Completed** status, the **Score** you have given them, and the **Scoring Comments** you made for the applicant if applicable.

You can click on the **Export to Excel** to open this report in an Excel document and save it to your local desktop.

Each applicant that you have completed will show **100%** percent complete. If the percentage does not show as 100% then there is a question that has not been completed in the tasks.

### 1.3 Reviewing the Applicants' Application and Score Sheet

- **Step 1:** To open the **Applicant's Score Sheet** for a specific Task. Click on the **Applicant's Name** listed in the task.

Blackbaud ID	Applicant	Percentage Completed	Score	Scoring Comment
	Cruz, Patricia	0 %		
	Graves, Kathleen	0 %		
	Gustitus, Anthony	0 %		

- **Step 2:** One of the following screens will appear for the applicant:

If the Global Administrator has set the **Show Application Summary As A Link** control in the **Administration>Site Setting** to “No”: The following task/score sheet is displayed: (The applicant’s application form will appear to the right of the task’s questions to complete)

**Applicant Name: Cruz, Patricia**

[View Application](#) | [Admin PDF](#)

**Criterion #1: Academic Performance Measurement:** Refer to the Education Information, Academic Honors and Academic information from the Guidance Counselor sections. SAT scores above the 2013 VA average: Combined Math + Reading = 103, Writing = 498, Total = 1,529. Class rank in the upper 25%. Academic challenging classes chosen (Academic Honors, higher math appropriate for career path, etc). Achievement of academic potential. **Please score 1-10 with being the best score.\***

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

Application Summary of : Cruz, Patricia	
General Information	
*First Name:	Patricia
Middle Initial	M
*Last Name:	Cruz
*Date of Birth:	
*Gender:	Female
Home/Mailing address:	
*Address:	
*City or County:	
*State:	
Zip Code:	
*Home phone:	
Student cell phone:	

If the Global Administrator has set the **Show Application Summary As A Link** control in the **Administration>Site Setting** to Yes: The following task/score sheet is displayed: (This will not show the application form, you will have to click on the “View Application” to open the application form in another tab in your browser.)

- **Step 3:** When viewing the application using either the “View Application” or in the display view, you can view any attachments that may be available by locating the actual question in the application form and clicking on the highlighted document;

**FASFA EFC Information**

<p><b>Financial Information</b></p> <p>Some Community Foundation scholarships take students' financial circumstances into account as part of the scoring process. Please share information that will help reviewers understand your situation.</p>	
<p><b>FASFA/STUDENT AID REPORT:</b></p> <p>A Student Aid Report is emailed or mailed to students who have completed the FAFSA or Federal Application for Student Aid. It includes the students Estimated Family Income or EFC number.</p> <p><b>Please upload only the first page, or Summary page, of your Student Aid Report or SAR.</b></p> <p><a href="#">A sample SAR can be seen here</a> (opens in a new browser window.)</p>	
<p>*EFC as reported on your Student Aid Report</p>	<p>\$55,945</p>
<p>*Upload the Summary of your SAR</p>	<p><a href="#">SAR_file.pdf</a></p>

Or you can scroll to the bottom of that application form and locate the Attached Documents section showing all the attachments and click on the attachment there.

Document Title	Question	Date Uploaded
<a href="#">SAR_file.pdf</a>	Upload the Summary of your SAR	4/3/2014 1:50:00 PM

- **Step 4:** If you want to print a PDF copy of the applicant’s application combined with all the attached documents you can click on PDF option available. This will create one PDF document of the application and all the attachments.

**Applicant Score Sheet**

**Aaron Kessler Score Sheet**

Save Save & Exit Save & Next Exit without Save Reset Form

Applicant Name: **Cruz, Patricia**

[View Application](#) [Admin PDF](#)

ⓘ 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.\***

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

- **Step 5:** Once you have completed answering all the available questions or scores, you can click the **Save & Exit** to return to the listing of applicants and select the next applicant to review. If you are reviewing multiple applicants, you can click the **Save and Next** to be directed to the Next applicant in the task for review.

- **Step 6:** Once you return to the listing of assigned applicants it will show the percentage complete for that applicant. If it does not show 100% complete then you will need to return to that applicants score task and complete any missed questions.

**Review Applicants**

Evaluation Task: Aaron Kessler Score Sheet

[Export to Excel](#)

Blackbaud ID	Applicant	Percentage Completed	Score	Scoring Comment
	<a href="#">Cruz, Patricia</a>	17 %	10	
	<a href="#">Graves, Kathleen</a>	0 %		
	<a href="#">Gustitus, Anthony</a>	0 %		

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

- **Step 7:** To navigate back to the Tasks listing click on the Task name or the Review Applicants listed in the bread crumb navigation at the top of the page.

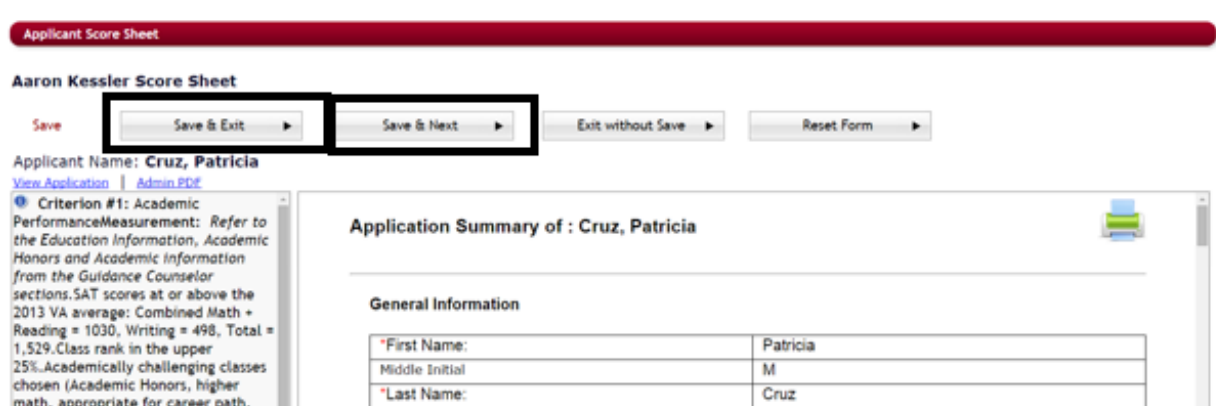
[Home](#) > [Review Applicants](#) > Scholarship for organization accepting High School applicants with Multiple funds & Multiple Request Sections

## 1.4 Additional Push Scores option for Reviewers

If the Global Administrator has selected in the Administration>Site Setting: General Settings: Push Committee Scores: **Push Scores within Application** or **Push Scores across all Applications within the Academic Year**, then once the assigned reviewer reviews an applicant and clicks either **Save and Next** or **Save and Exit** they will have the option to push scores for other tasks or applications they may be assigned to for the same applicant.

**Important Note to Administrators:** Only the scoring questions that are created in each score card with the exact same XML name and question type formatting will be pushed. If the XML Name on a scoring question is not the exact match, or the question type formatting has been changed it will not import and push that data. Therefore, it is best to clone the tasks when creating them in order to keep them consistent.

- **Step 1:** Once the reviewer completes the individual score card review for the applicant they will click either the **Save and Exit** or **Save and Next**, button:



Applicant Score Sheet

Aaron Kessler Score Sheet

Save Save & Exit Save & Next Exit without Save Reset Form

Applicant Name: Cruz, Patricia  
[View Application](#) | [Admin PDF](#)

④ 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.

Application Summary of : Cruz, Patricia

General Information

*First Name:	Patricia
Middle Initial	M
*Last Name:	Cruz

- **Step 2:** If they have been assigned to that same applicant in another review task, the following screen will appear, showing any additional tasks they have been assigned to for that applicant:



**Push Scores For Applicant**

The Applicant Cruz, Patricia is also assigned to you for the below reviews

Applicant	Evaluation Task	Application Name
<input type="checkbox"/> Cruz, Patricia	ArvinMcCordScoreSheet	Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections

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

- **Step 3:** If they want to push the replies they just entered on the previous score card, they will put a check in the box next to the applicants name. Once they check it and click **Save**, all the scores from the prior score sheet that match questions in the additional score sheet(s) will be automatically pushed to the selected tasks. Only the selected tasks will be pushed.

<input checked="" type="checkbox"/> Cruz, Patricia	ArvinMcCordScoreSheet	Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections
--	-----------------------	--

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

If they do not want to push to any of the tasks then they can simply click Cancel and continue the review of the other applicants.

- **Step 4:** Once they push those changes they will still want to go to the additional task(s) and complete any other additional required questions that may be present on that task and confirm its completion.