communityforce™
SOFTWARE & SERVICES

Scholarship Management System
Training Guide
Module 4 - Setting up Funding Source (Competition/
Funds/Scholarships/Grants)
Ver 7.5
Updated on: 7/2015

Prepared by:

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Module 4 – Setting up Funding Source (Competition/Funds/Scholarship/Grants)

In this Module we will discuss the Funding Source Setup Process in the system. A funding source is your allocation pool or monies that you will be awarding from. This will allow you to manage all the Funding Source funds that are for your Applications.

1. Setting up your Funding Source

The Funding Source is the source of funding used to fund a specific application process. In order to publish an application to accept applicants you must link that application to a funding source.

You could have multiple funds for one application or one application with one funding source for that application.

In order to monitor the awarding for each funding source, you must set up each source separately. (I.e. if you have three funding sources funding a specific application, you need three separate fund sources created.)

Important: If using a one to many application process, you will create a posting fund to link to the actual application that the applicants are applying to. Then publish that fund so that applicants can apply to it. However, you will still want to create separate funding sources for each of the separate funds that are included in that one application, but will not have an associated application linked to those individual funds.
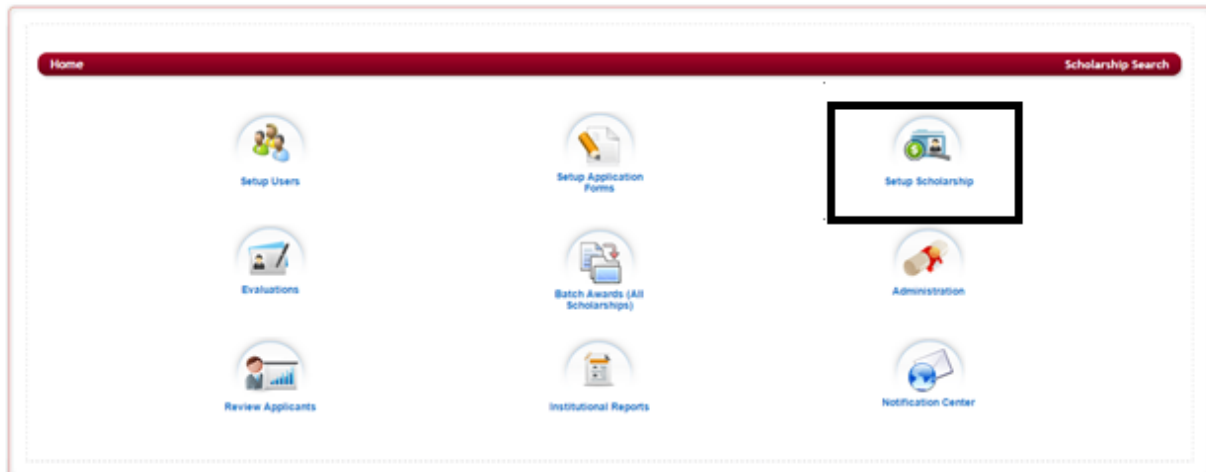
1.1   Creating a Funding Source

Exercise 1

➢ **Step 1:** From your Home dashboard, click on Setup Scholarships (this icon's label may have been changed according to the term that you use for your funding source)

Setup Scholarship

➢ **Step 2:** The following screen will open, listing any funding sources that you may have already setup on your system, otherwise it will be blank if you have not setup any funding sources.
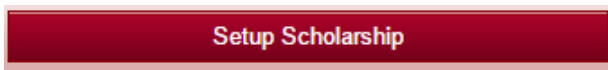

This listing will show the **Name of the Funding Source**, any **Application** directly linked to that funding source, the **Sponsoring Organization** that maintains the funding source, and if that funding source has been **published**.

➢ **Step 3**: Click on the **Setup Scholarship** button to create a new funding source

➢ **Step 4:** The Setup New Scholarship screen will open.

➢ **Step 5**: **Scholarship Name:** Enter the name of the funding source. If this is the posting fund use the name of the application cycle and the year (I.e. 2015 Scholarship Application) Otherwise use the actual name of the funding source that is familiar to those in your organization and the applicants applying.

➢ **Step 6: Associated Application:**
  • If each funding source has its own application, select the application for that single funding source.

  • If this is the posting fund for a one to many process, select the application that is used to apply to all the funds in that application process.

- If this is the awarding fund that is part of a one to many application processs, and you are using one application to apply to all the separate funds, when you create those individual funds leave this blank on each one.

➢ **Step 7: Sponsoring Organization:** Select the organization(s) responsible for maintaining the Funding Source fund.

➢ **Step 8: Annual Budget/Academic Year:** Enter the total amount to be awarded from this funding source for the current academic year and select the Academic Year for this award period. (If you have associated an application to the funding source, this will automatically populate with the same academic year as the application form.)

➢ **Step 9: General Ledger Account:** This is not a required field but you can use it to enter your General Ledger Account number that is used by your accounting program to track the funding for this fund.

➢ **Step 10: Award Amount:** This is not a required field. This is a text field that allows you add how the funding will be awarded, i.e. 10 awards @$1,000 each.

➢ **Step 11:** Complete any custom fields that may be required by your organization.

➢ There ar 20 pre-formated, customizable fields that are available for use. These fields will need to be set up by your Global Administrator in the **Administration>Site Settings:Grants/Fellowship Settings.** Therefore, many of they fields in the illustration above will be different depending on what your Global Administrator has activated. Please see your Global Administrator if you have any questions about the fields that have been set on your site.

➢ **Step 12: Published (Viewable to the Applicant:** This allows the Funding Source fund and its application to be public and viewable to all applicants.
  - Select "yes" to allow it to be viewable to applicant's

- Select "no" when it is has a private application process or it is no longer an active fund and no longer to be published.

Published(Viewable to the Applicant): ○ Yes ● No

Allow Non-CFTS applicants: ● Yes ○ No   Allow CFTS Applicants: ● Yes ○ No

➢ **Step 13: Allow Non-(your org. name) Applicants:**
  - Select "yes" if the Funding Source fund is available to applicants that are not a member of your organization. (if not using Single Sign on authentication then you would default this to "Yes" for all your funding sources)
  - Select "no" if this funding source is just for applicants that are members of your organization.

(This is used for clients using single sign that have applicants from their organization log in through their portal. If they select **"no"** to this item then only applicants that are logging in directly from their portal will be able to access this funding source anyone that tries to log in outside the portal will not have access to this funding. If they select **"yes"** then all applicant, no matter how they log in to access the site will be able to apply for this funding source)

➢ **Step 14: Allow (your org. name) Applicants:**
  - Select "yes" to allow applicants that are members of your organization to apply for this specific Funding Source.
  - Select "No" if this funding source is **only for Non-members** of your organization to apply to.

➢ **Step 15: Email Signature:** When sending emails from the site, if you use the "Scholarship Signature (site setting)" merge field in the email templates for that funding source's application form, the system defaults to the site signature that was set on the **Administration>Site Settings: General Settings: Signature** by the Global Admin. If you want the "Signature" for emails sent regarding this funding source's application to be different than the default, enter that signature in this box. This would then override the site setting signature. Otherwise you can leave this blank.

  - o **Note:** if you are setting up a funding source that does not have an application directly associated to it in the Associated Application field (i.e. One to many application process and this is the awarding fund not the posting fund) this signature will not override. Only funding sources that have application forms directly linked in the Associated Application Field can have the signature overridden in that applications Notification Center email templates.

➢ **Step 16: Brief Description:** Enter the short description of the Funding source that is displayed in the fund search listing

➢ **Step 17: Description:** Enter the full description of the Funding Source fund that is available after the applicant logs in.

➢ **Step 18:** You may have some additional customized editor boxes that were set by your organization, complete those as required.

> **Step 19:** Click Save and Next

> **Step 20:** Depending on what setting have been set on your site, you may be directed to the Add a Contact, Add a Donor, and Search Filter setup. Please see the following instructions on how to perform each if required by your organization.

> **Step 21:** if there are no other items to be completed, you will receive a message that the fund has been created, click ok to return to the Funding source listing

Status Update	171
Scholarship has been created.	
Ok	
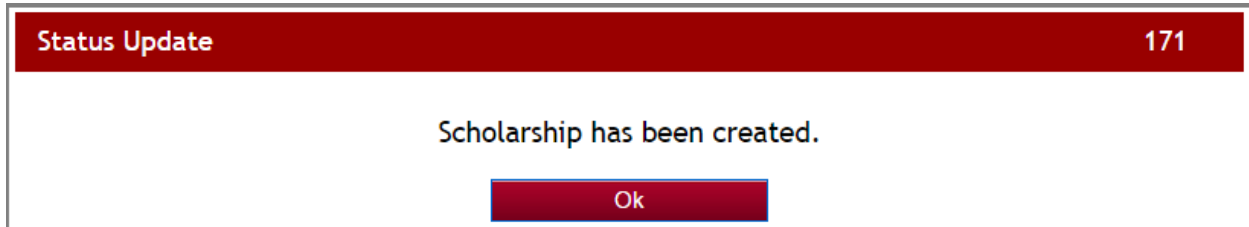
Note: once you create your funding source and open it again the **Grant Link:** will appear. This is the URL link that you can add to emails or your website that directs an applicant directly to this funding source to apply to it. This will not appear until after you have saved the initial setup and returned to this page.

Grant Link: https://scholarshiptraining.communityforce.com/Funds/FundDetails.aspx?
3974434C474C374F385A77704B6B58334C3250464C50492F764E6A4843584C54334D672B37735A75387047727732615035786C375138472F696D69496F685871

1.2   Adding a Contact to a Fund (Optional)

The fund contact is the staff member responsible for the Funding Source fund. You can enter multiple contacts if more than one person is responsible.

In order to use the Contact Feature in your funding source, your Global Admin must first select "Yes" for the **Enable Fund Contact** feature in the **Administration>Site Settings: Grants/Fellowship Settings.**

Once this feature is activated it can be accessed two ways:

1. **When first creating your funding source** and you click Save and Next, the Add a Contact Screen will appear:

Setup New Scholarship
Contacts
No Record(s) Found
Add A Contact
Previous   Next   Cancel
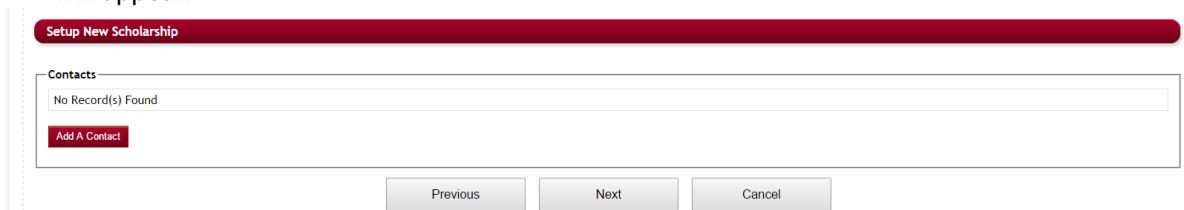
2. **Existing Funding Source**: When in the funding source listing click on the name of the funding source you want to add a contact to. Scroll to the bottom of the page to view the Add A Contact

Contacts

No Record(s) Found

Add A Contact

Exercise 1

➢ **Step** 1: To add a contact click on the Add A Contact button.

Add A Contact

➢ **Step 2:** The Add Contact Screen will appear:

Add Contact

Search By:

Net ID:	Last Name:	First Name:	Email:

Role Type: Department:

Select   Search

No Record(s) Found

Exit ▶

➢ **Important:** Contacts must already have a user account set up in the system. If they do not have an account you must go to the User Setup and create an account for them, prior to adding them as the fund contact.

➢ **Step 3:** Use the **Search By:** feature to search the Users table list for the contact you want to attach to this Funding Source fund (you can search on one or more of the search options available).

➢ **Step 4:** A listing of names that meet the search criteria you selected will appear

Select	Last Name	First Name	Email	Cell Phone	Department
Add	Smith	Lydia	smit1416@cf.com		
Add	Smith	Snow	msncs2@msn.com		na
Add	Smith	Lee	rls@cfcsra.org	706-724-1314	Reviews
Add	Smith	Christine	christines@communityforce.com		n/a
Add	Smith	Cody	cody_msmith@cf.com		
Add	Smith	Connor	connorsmith@cf.com		
Add	Smith	Jean	jean.smith@CF.com		FASYAA Ezra Stiles College
Add	Smith	Christine	ChristineS@CF.com		admin
Add	Smith	Cosmo	msncs2@verizon.net		na
Add	Smith	Christine	Christine@CF.com		Training
Add	Smith	Sarah	carrie.smith@cf.com		
Add	Smith	Chelsey	csmith2326@cf.com		

Exit ▶

➢ **Step 5:** Click the Add button next to the contact you want to add.

➢ **Step 6:** You will receive a confirmation message saying that the Contact was added successfully. Click OK to confirm

Status Update   **269**

The contact was added.

Ok
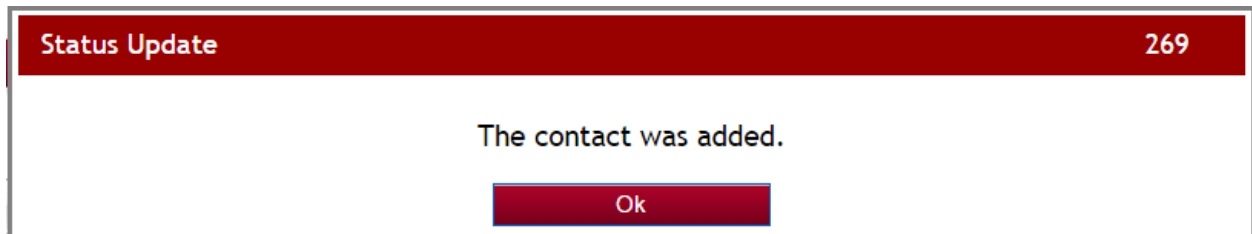
➢ **Step 7:** The name will appear under the Contacts section.

Contacts							
Display Order			Last Name	First Name	Email	Cell Phone	Department
✖	▲	▼	Smith	Christine	Christine@CF.com		Training

Add A Contact

Repeat these steps for each contact you want to add.
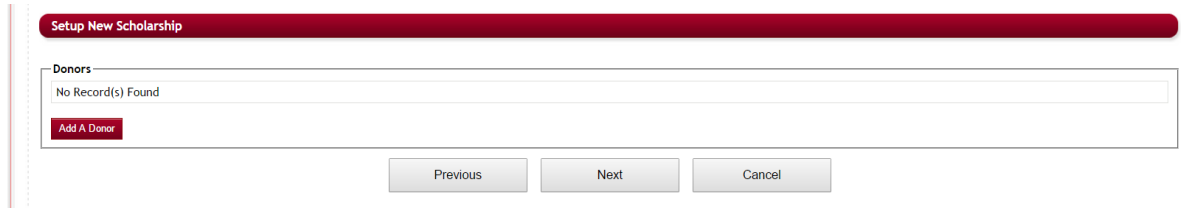
➢ To remove a contact click the red "X" next to the name you would like to remove.

1.3   Adding a Donor to the Fund (Optional)

In order to use the Donor Feature in your funding source, your Global Admin must first select "Yes" for the **Enable Fund Donor** feature in the **Administration>Site Settings: Grants/Fellowship Settings.**

Once this feature is activated it can be accessed two ways:

1. **When first creating your funding source** and you click "Save and Next", the Add a Contact Screen will appear, if activated, click Next on that screen. If it is not activated then the next screen will be the Add a Donor screen:

2. **Existing Funding Source**: When in the funding source listing click on the name of the funding source you want to add a donor to. Scroll to the bottom of the page to view the Add A Donor.

Exercise 1

➢ **Step** 1: To add a donor click on the Add A Donor button.

➢ **Step 2:** The Add/Edit Donor Screen will appear:

Add/Edit Donor

* Donor ID:	7da993d5
Last Name:	
First Name:	
Organization:	
Email:	
Cell Phone:	
Notes:	

Save ▶   Cancel ▶

➢ **Step 3:** Enter the donor information and click Save to save it to the Funding Sources/Funds.

➢ **Step 4:** The donor's information will now appear under the Donors Section for the funding source.

Donors

	Last Name	First Name	Organization	Email	Cell Phone	Notes	Donor ID
✎ ✖	Johnson	James				Donor to this fund. Would like to be acknowledged in all postings.	7da993d5

Add A Donor

➢ Repeat these steps for each Donor you want to add.

➢ To edit the Donor information click on the 🖉 Edit icon next to the donor's name.

➢ To remove a contact click the red "X" next to the name you would like to remove.

1.4 Adding Search Filters for Fund (Optional)

This feature is used to help an applicant search for funds that they may be eligible for, prior to applying. This is helpful when you have multiple funding sources available for your applicants because it allows them to filter out only the funds they are eligible for, without having to scroll through and view multiple funds to find them.

Prior to setting up search filters specific to a funding source fund, global search filters must be created by the Global Admin under **Administration> Search Filters**.
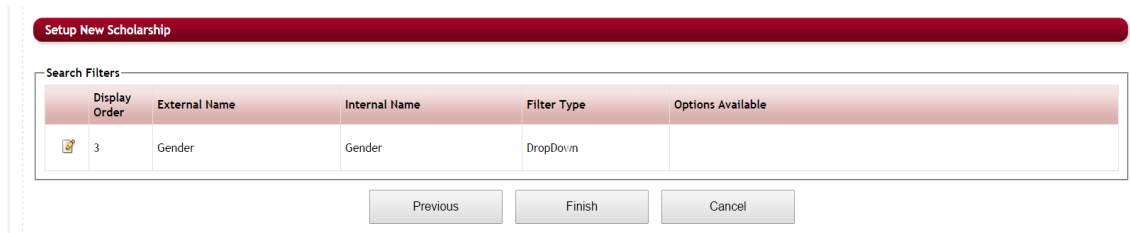
Search filter are organized into criteria groups. With each group containing the required values for that specific group.

If your organization has set up global search filters, when you are in the funding source setup for a specific fund, you will see a listing of all the available search filters to select under the "Search Filters" section.

If your organization is not using the global search filters, then this section will be empty and selection will not be available.

Once this feature is activated it can be accessed two ways:

1. **When first creating your funding source** and you click "Save and Next", if activated, the Add a Contact Screen will appear, click "Next' on that screen. Also, if activated, the Add a Donor Screen will appear next, click "Next" on that screen. You will now be at the Search Filters section. (If the Add Contact or Add Donor are not activated you will be go directly to the Search Filters Section

2. **Existing Funding Source**: When in the funding source listing click on the name of the funding source you want to add a search filter to. Scroll to the bottom of the page to view the Search Filters.

➢ When the list first appears all the search filter items will be blank in the Options Available column, if search filters have not been set on this fund.

Exercise 1

➢ **Step 1:** Access the search filter section by using one of the methods mentioned above.

➢ **Step 2:** You will need to set **every search filter** that is active and showing on the search filter listing.

Search Filters

	Display Order	External Name	Internal Name	Filter Type	Options Available
✎	2	County	County	DropDown	
✎	3	Gender	Gender	DropDown	
✎	4	Is US citizenship required?	Citizenship Required?	DropDown	
✎	5	Major	Major	DropDown	
✎	6	State	State	DropDown	

➢ On the filters that apply to your funds specific eligibility only select the correct replies to be eligible for that fund. The other search filters you would select "all" as they would all apply.

For example:
Your funding source is for female applicants only. The following search filters are active:
County (select all)
Gender (select female only)
Is Us Citizenship Required? (Select all)
Major (select all)
State (select all)

➢ **Step 3:** Click on the Edit icon ✎ next to each of the search filters to set the values. The edit Search Filter box will appear.

Edit Scholarship Search Filter

Options Available:
(Click in the box to Edit)   Select ▼

Save ▶   Cancel ▶

➢ **Step 4:** In the "Options Available" click the drop down arrow to see the available replies that an applicant can search on to locate a funding source.

• If all the replies are eligible for your funding source fund, select the "All" at the bottom of the drop down listing. All the values will then be marked with a check mark. **Click OK to continue**.

Edit Scholarship Search Filter

Options Available:
(Click in the box to Edit)

Caroline,Clifton Forge,Fredericksburg,King ▼

☑ Caroline
☑ Clifton Forge
☑ Fredericksburg
☑ King George
☑ Lynchburg
☑ Orange
☑ Prince William
☑ Spotsylvania
☑ Stafford
☑ Westmorel&Other

Select [All] | None   Ok

- If only one of the replies is eligible, select only the eligible reply and **click OK to continue**.

Edit Scholarship Search Filter

Options Available:
(Click in the box to Edit)

Female   ▼

☐ Male
☑ Female

Select: All | None   Ok

➢ **Step 5:** The selection(s) will now appear in the Options Available. Click Save to save the filters and return to the setup screen.

Edit Scholarship Search Filter

Options Available:
(Click in the box to Edit)

Female   ▼

Save ▶   Cancel ▶

➢ **Step 6:** The Search Filters section will now display all the selections for that filter.

	Display Order	External Name	Internal Name	Filter Type	Options Available
📝	2	County	County	DropDown	Caroline~Clifton Forge~Fredericksburg~King George~Lynchburg~Orange~Prince William~Spotsylvania~Stafford~Westmorel&Other
📝	3	Gender	Gender	DropDown	Female
📝	4	Is US citizenship required?	Citizenship Required?	DropDown	Yes~No
📝	5	Major	Major	DropDown	Anthropology~Art~Art History~Astronomy~Biochemistry~Biology~Business~Chemistry~Classical Studies~Communication~Computer Science~Economics~Education~English~Environmental Science~French~Gender Studies~Geology~German~Health and Movement Studies~History~International Studies~Kinesiology and Integrative Physiology~Mathematics~Medieval Renaissance Studies~Music~Philosophy~Physics~Political Science~Pre Dentistry~Pre Law~Pre Med Pre Health~Pre Pharmacy~Pre Physical Therapy~Pre Veterinary Sciences~Psychology~Sociology~Spanish~Theatre~Theological Studies~Other
📝	6	State	State	DropDown	Alabama~Alaska~Arizona~Arkansas~California~Colorado~Connecticut~Delaware~District of Columbia~Florida~Georgia~Hawaii~Idaho~Illinois~Indiana~Iowa~Kansas~Kentucky~Louisiana~Maine~Maryl&Massachusetts~Michigan~Minnesota~Mississippi~Missouri~Montana~Nebraska~Nevada~New Hampshire~New Jersey~New Mexico~New York~North Carolina~North Dakota~Ohio~Oklahoma~Oregon~Pennsylvania~Rhode Isl&South Carolina~South Dakota~Tennessee~Texas~Utah~Vermont~Virginia~Washington~West Virginia~Wisconsin~Wyoming

Save ▶   Save and Exit ▶   Exit without Save ▶

> **Step 7:** Repeat these steps for every filter. Once all the filters are completed, Click Save or Save and Exit on the Fund setup page to save the information.

1.4.1   How does the applicant search using the search filters:

In order for the eligibility search filters to be viewable by the applicant the Global Admin will need to select "**Yes**" to the **Enable Search by Eligibility Criteria** in the **Administration>Site Settings: General Settings section.**

Once this is activated all the activated search filters will display on the applicant's search screen for the applicant to search on.

Search by Scholarship Eligibility

Display Scholarship that match **All** of my selections:
(Select more options to return a narrower set of results)

County	Select ▼
Gender	Select ▼
Is US citizenship required?	Select ▼
Major	Select ▼
State	Select ▼

Search by Eligibility   Clear

The applicant will select their search filters by clicking the drop down arrow selection for each filter and then click the **Search by Eligibility** button to search for those funds that meet the filters selected. They can also click clear to clear the selections and re-enter new filters

County	King George ▼
Gender	Female ▼
citizenship required?	Yes ▼
Major	Computer Science ▼
State	Virginia ▼

Search by Eligibility   **Clear**

All the funds that match their selection will appear.

Total Scholarship: 20 / My Results: 1	New Search | Sort By: Scholarship (A-Z) ▼

1 First Fund

This funding is available to all female applicants. The donor of this fund was a single mother of three daughters and wanted to inspire other young females to pursue their goals of education.

Begin Accepting Applications Date: 06/12/2015
Deadline Date (EST Time Zone): 06/18/2015 12:00AM

Go to Page 1 Go   ⬅ Page 1 Of 1 ➡   Display All ▼ Records per Page

## 1.5   Editing Existing Fund

To edit an existing fund while in the Setup Funding Source listing click on the Name of the specific fund you wish to Edit. This will open up the Funding Sources/Funds Details page. Make any appropriate changes and click on Save or Save and Exit to save the changes.
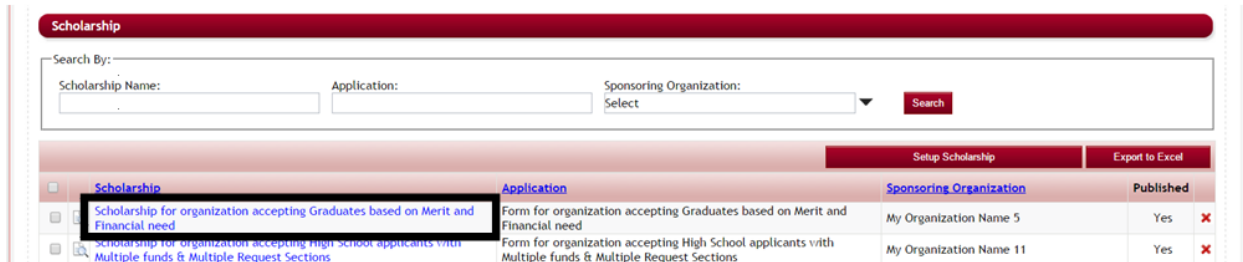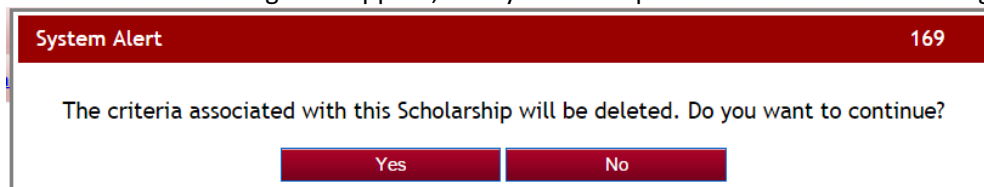

1.6   How to Delete a Fund

To delete an existing fund, while in the Setup Funding Source listing click on the click on the red **"X"** at the end of the Funding Source fund you want to edit.

*Caution: Deleting a Funding Source fund will delete any information tied to the fund as well.
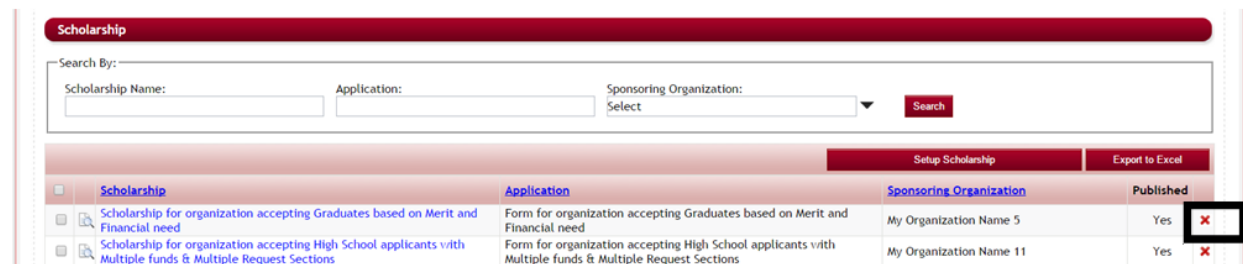
A confirmation message will appear, click yes to accept the deletion of the Funding Source fund.

1.7   How to Search for a Fund

While in the Setup Funding Source listing section, you can search for a specific Funding Source fund by using the Search By feature located at the top of the section.

You can search by one or all of the search filters and click the **Search** button to locate the Funding Source fund.

- **Funding Sources/Funds Name:** Search the name of the Funding Source fund
- **Application Name:** Allows you to search for all Funding Sources/funds by the Application they are linked to.
- **Sponsoring Organization:** Allows you to search for funding sources by a specific sponsoring organization, showing only those funds that are for that organization.

1.8   How to Preview a Fund

You can preview how a Funding Source fund will appear to the applicant when they are viewing from the search screen or in matching fund areas.

While in the funding source setup listing, clicking on the Preview Icon next to the Funding Source fund you want to preview.

The View Funding Sources/Funds Details view will appear for you to preview.

Welcome   Search for Scholarship | Login

Scholarship for organization accepting Graduates based on Merit and Financial need

Begin Accepting Applications Date: 01/15/2014
Deadline Date (EST Time Zone): 12/31/2014 10:00PM

Description:

GENERAL INFORMATION:
Two types of fellowships are being offered for the 2014-2015 academic year: (1) merit-based and (2) need-based. Merit-based fellowships are awarded on the basis of academic and leadership accomplishments and need-based fellowships are awarded on the basis of financial need, academics and leadership accomplishments. Applicants who opt to complete the Financial Information section will be considered for both merit-based and need-based fellowships.

Fellowships are available through the Foundation and made possible by contributions from generous alumnae, family and friends. The Foundation receives more applications than these funds can support. Many scholarships and fellowships were designated by the donors to members of specific chapters, specific geographic areas or specific fields of study. Failure to qualify for financial aid from a federal or state student-aid program does not disqualify you for consideration of a Foundation financial aid award.

Custom Field 17 Essay:
Minimum Requirements

1. You must demonstrate scholastic achievement and submit proof of acceptance into a 2014-2015 graduate program before the award check can be dispersed.

2. You must be a member in good standing, including payment of $25 for international alumnae dues.

1.9   How to Export the Funds Listing to Excel

If you would like an Excel spreadsheet report of all the Funding Sources/Funds you currently have set up in your program, click the Export to Excel button in the funding source listing section.
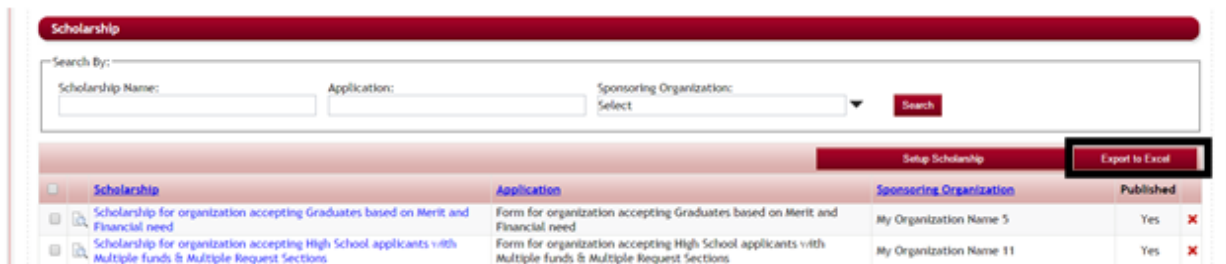
This will give open an Excel report showing the Funding Source fund Name, Application Form Name, Sponsoring Organization, if it is published, and the Annual Budget.

Scholarship	Application Form	Sponsoring organization	Published	Annual Budget
2014-2015 SDSU Scholarshi	-		No	$0
Aaron C. Kesler Future Firef	-	Test , My Organization Nam	Yes	$5000
Arvin-McCord Scholarship	-	My Organization Name 3 , N	Yes	$500
Bob J. Tandy Scholarship	-	My Organization Name 9 , I	Yes	$500
Brian Bowman Memorial Sc	-	My Organization Name 5 ,	No	$0
Common Application Form	2015 Common Application	My Organization Name 2 , N	No	$100000
Common Fund 1	Common Fund 1	Test , My Organization Nam	Yes	$5000
Common Fund 2	Common Fund 2	My Organization Name 2 , N	Yes	$5000
Cory Knecht Memorial Scho	-	My Organization Name 5 ,	No	$0
Edith V. Botts Nursing Scho	-	My Organization Name 5 ,	No	$0
Ernest and Diana Rhoads S	-	My Organization Name 5 ,	No	$0
Florence and Lee Servies Sch	-	My Organization Name 5 ,	No	$0
Frances E. Gray Family Scho	-	My Organization Name 5 ,	No	$0
Fred and Ina Clark Scholars	-	My Organization Name 5 ,	No	$0
Homer C. Warren Family Sc	-	My Organization Name 5 ,	No	$0

2. Associating multiple funding sources to one application

Associating multiple funding sources to one application, allows you to set matching eligibility criteria in your applications, that will match your applicants to multiple funding sources that may be available to them. There are two separate instances that you would want to associate multiple funding sources to one application:
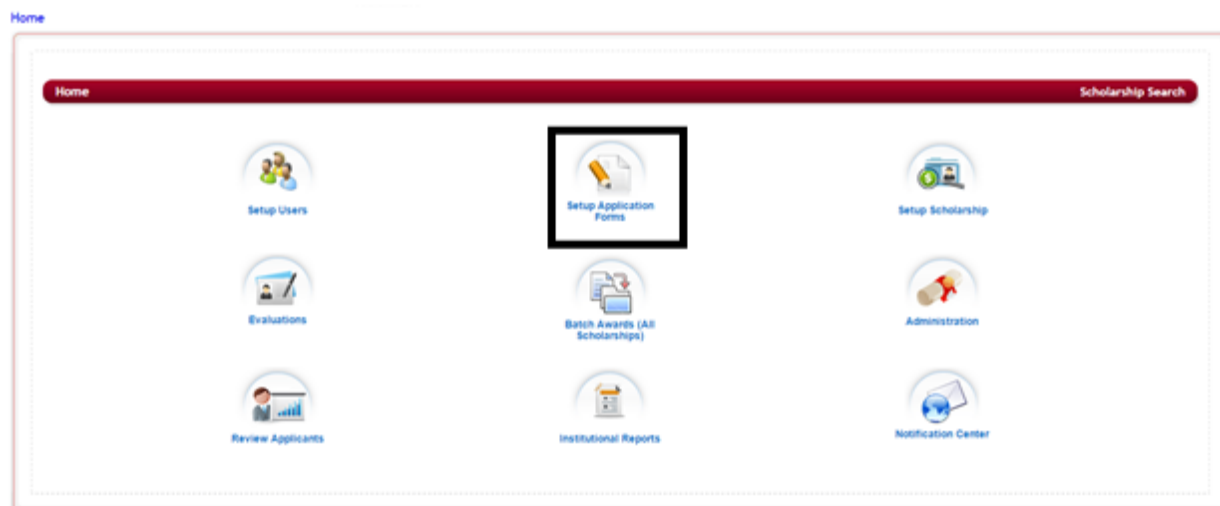
1) When setting up a One to One application and using the View Matching Scholarships process.
2) When setting up your One to Many application and you need to be able to match applicants in that one application to all the funding sources they are eligible for.

2.1   Accessing the Manage Application Funds

Manage Application Funds allows you to link the separate funding sources to one single application.

Exercise 1

➢ **Step 1:** From the **Home Dashboard** select the **Setup Application Forms**.

➢ This will open the Applications' listing:

> ➤ **Step 2:** In the One to Many application: Select the group application that is being used by the applicants to apply to all your funding sources. In the One to One application select just the application for that one funding source.

> ➤ **Step 3:** The application's dashboard will open:

> ➤ **Step 4:** Select the Manage Application Funds Icon

> ➤ **Step 5:** The Manage Application Funds will open. There are two boxes that are available Un-Assigned Scholarship and Assigned Scholarship.

> ➢ The Un-Assigned box will be a listing of all your funds that are currently published that you can assign to your application.
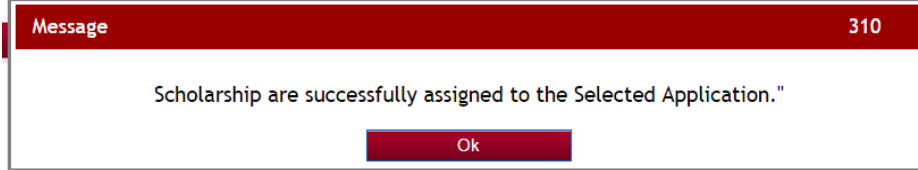
Manage Application Funds

Select Application : 2015-2016 Application For all funding ▼

Un-Assigned Scholarship
```
2015-2016 Scholarship Application for all funding
Aaron C. Kesler Future Firefighters Scholarship
Arvin-McCord Scholarship
Bob J. Tandy Scholarship
New Fund 3
Test Fund
Z1 First Fund
Z2 Second Fund
Z3 Third Fund
Z4 Forth Fund
```

Assigned Scholarship

▶
◀
Save

> ➢ **Step 6:** In the Un-Assigned column, select all the funding sources that are to be added to this application and click on the right directional arrorw to add it to the Assigned Scholarship column. You can click the left directional arrow to move it back to the Un-Assigned.
>
> **Note:** If you do not see a fund then it was not marked as published. You will need to return to the fund setup, mark it published, and then assign it on this section.

Manage Application Funds

Select Application : 2015-2016 Application For all funding ▼

Un-Assigned Scholarship
```
2015-2016 Scholarship Application for all funding
Aaron C. Kesler Future Firefighters Scholarship
Arvin-McCord Scholarship
Bob J. Tandy Scholarship
New Fund 3
Test Fund
```

Assigned Scholarship
```
Z4 Forth Fund
Z3 Third Fund
Z2 Second Fund
Z1 First Fund
```

▶
◀
Save

> ➢ **Step 7:** Once you have you funds moved to the assigned column, click on the Save to save the assignment.
>
> ➢ **Step 8:** An alert will appear confirm that you want to assign those funds to this application. Select OK to continue

Alert   309

Are You Sure You want to Assign the Funds

Ok

➢ **Step 9:** Click OK on the successfully assigned message:

➢ **Step 10:** The funds assigned to your application will now show at the bottom of the page and the assignment is complete.
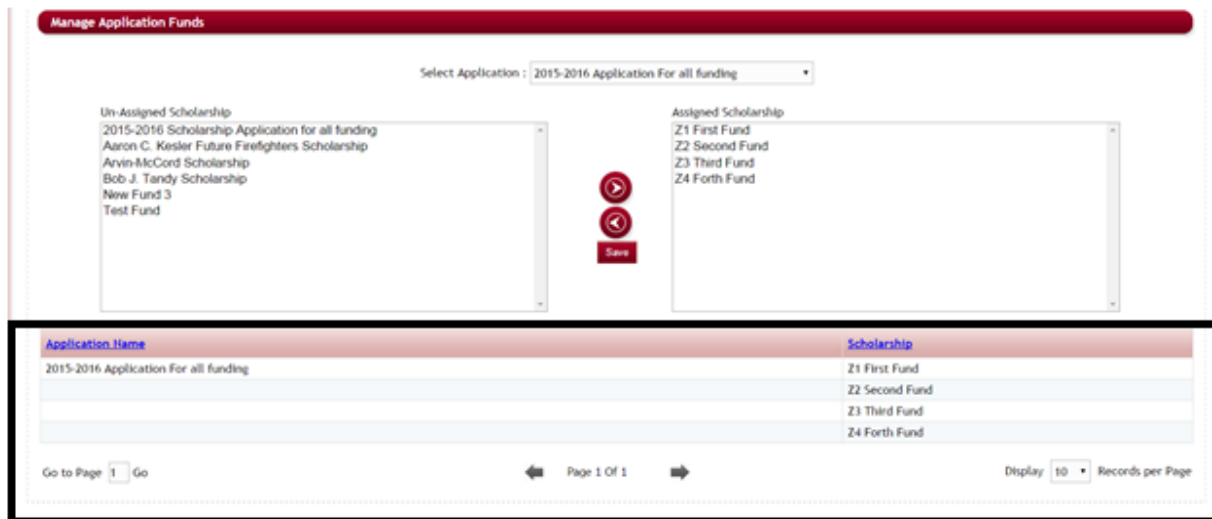
➢ **Step 11:** You will now need to set the eligibility criteria on each of the associated funds, in the **Manage Funds Criteria**, click on the application name in the breadcrumb navigation at the top of the page to return to the Application's dashboard.

2.2   Associating Multiple Funds to a single application form – One to Many application

This is used in a ***one to many process***. When you have one application that is used by your applicants to apply for multiple funding sources.

(Note: This is different from the Common Application Process, please see the Training guide: Setting up a Common Application Process.)

When setting up the funding source in the Funding source setup, you will recall that if using a one to many relationship you do not associate an application to that individual funding source, you would leave the Associated Application field blank. You only associate the main application to a posting fund. So then that raises the question how is a funding source linked to the group application?

When you have an application that has multiple funds tied to the application you will need to be able to get a listing of applicants that match to specific funds based on criteria questions that were set up in the application form.

Important: You will also need to make sure to include a section that contains the Matching Fund Eligibility Question. (See: **Module 3: Application Form Setup>Adding Questions to your application form>Adding the Matching fund Eligibility Question**). If you do not want the applicant to see this section you can make it a staff section. However, this question must be present in the group Application Form in order to use the Manage Application process.

Once you have the questions built into the application, and you have your funding source funds created, you can begin linking your funds to the application using the **Manage Application Funds** and the **Manage Funds Criteria Information.**

2.3   Associating Multiple Funds to a single application form – One to One application

When using the *one to one* application process, if you are using the **View Matching Funds** feature, you will need to assign to each separate application that is part of that process, all the additional funding sources that you want the applicant to be able to apply to.

1) Each funding source has its own application associated to it.
2) Then in each application, you must link all the additional funding sources to it using the **Manage Application funds** and the **Manage Funds Criteria Information**.

(See Module 3: Additional Application Setup Features; View Matching Scholarships, for more details on the use of this functionality)

2.4   Managing Funds Criteria Information

Managing Fund Criteria creates the criteria condition reports that match applicants to each fund according to how they answer those specific eligibility criteria question.

This will allow you to pull applicants that meet the eligibility criteria for a specific fund.

This is useful in the following ways:

1. You want applicants to see a listing of all the funds they have matched to using the Matching Fund Eligibility question. They can then unselect from that listing any funds they do not want to apply to.

2. You would like to be able to set logic on other questions and sections using the selected funds in the Matching Fund Eligibility questions. You can set logic on other additional questions or sections in the application that are to be answered if a specific fund is selected. Those questions/sections would only appear if the fund was matched to the applicant.

3. You have multiple funding source funds connected to just one application and you review on a **per fund basis** and need to know all applicants eligible for a specific funding source fund when assigning them to the reviewers.
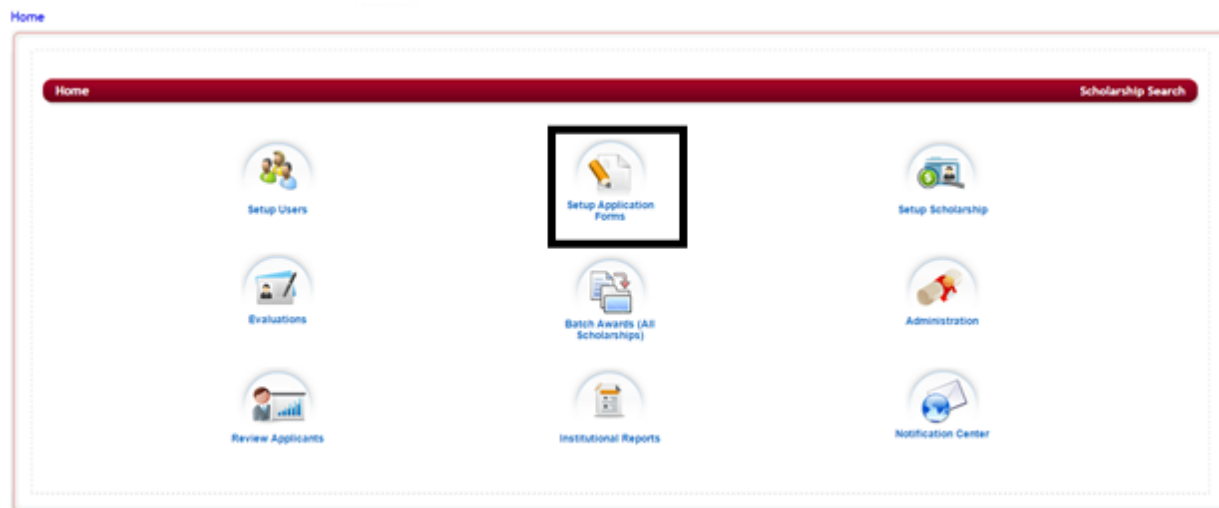
4. You have multiple funding source funds connected to just one application and you need to be able to see a listing of all eligible applicants eligible for a specific funding source when awarding specific funds.

5. You have multiple funding sources and each funding source **has its own application**. However, there could be funding sources that are similar that the applicant could apply to, based on the same criteria as another funding source. You need the applicant to be able to be matched to those additional applications based on the criteria that was matched in each and be able to select if they want to apply to those additional applications or not.

2.4.1 How to Set Up the Managing Funds Criteria Information:

Prior to setting the criteria in the Manage Funds criteria you will need to first associate those fund(s) to the application, in the Manage Application Funds. Once they have been linked to the application you can set the criteria for only the fund(s) linked to that application.

Exercise 1

➢ **Step 1:** From the **Home Dashboard** select the **Setup Application Forms**.

➢ This will open the Applications' listing:

- ➢ **Step 2:** In the One to Many application: Select the group application that is being used by the applicants to apply to for all your funding sources. In the One to One application select just the application for that one funding source.

- ➢ **Step 3:** The application's dashboard will open:

- ➢ **Step 4:** Select the **Manage Funds Criteria Information** Icon

- ➢ **Step 5:** The Manage Eligibility Criteria listing will open, listing all the funds that were linked to this application in the **Manage Application Funds.**

Manage Scholarship Eligibility Criteria

Export to Excel

Scholarship	Eligibility Criteria
Z1 First Fund	Set Criteria
Z2 Second Fund	Set Criteria
Z3 Third Fund	Set Criteria
Z4 Forth Fund	Set Criteria

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

➢ **Step 6:** Locate your fund and click the **Set Criteria** under the Elgibility Criteria column located in the same row as your fund.

Scholarship	Eligibility Criteria
Z1 First Fund	Set Criteria
Z2 Second Fund	Set Criteria
Z3 Third Fund	Set Criteria
Z4 Forth Fund	Set Criteria

➢ **Step 7:** The criteria conditions screen will appear for that fund where you will set each condition filter for each question making that determines the applicants eligible for that fund.

Manage Scholarship Eligibility Criteria : Z1 First Fund

Select Filters

Add New Condition

| Save ▶ | Save & Exit ▶ | Exit ▶ |

➢ **Step 8:** To add a criteria Condition click the **Add New Condition** button.

Add New Condition

➢ **Step 9:** The condition selection will appear. You will be selecting the questions and the values that allow eligibility.

> ➢ **Step 10:** Try creating a condition on a fund using the following guidelines.

1. **Report Item** – Select the area of the application process where the item is located:
   a.   **Application Data** – allows you to pull on the following items:
      - Status
      - Status Details
      - Status Details Comments
      - Previous Status
      - Is Archived
      - Date Time Submitted
   b. **Section Data:** will allow you to select the sections in your application and the questions in that section. Select the section that contains the question.
   c. **Score Card Information**: allows you to pull all values from the question fields with-in the **Evaluation Tasks** that you set up as a part of your review process.

2. **Section Name:** Select the section in your application that has the criteria question

3. **Field Name:** Select the actual criteria question

4. **Filter:** what is the filter condition of the answer/value that has to be met in order for the applicant to be eligible.
   - 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.

5. **Filter Value:** What is the answer/value the applicant must answer in order to meet the eligibility? Enter the value. (The value must be entered exactly as it is in the question setup)

6. **Group:** This column 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.

7. **Blank/And/Or operator**: Used when entering multiple lines of condition values. Once you enter your first line you will click on the and/or box or leave it blank if you don't have any additional conditions to set.
   - **And** means all of the conditions in the listing need to be met in order for the applicant to be eligible.
   - **Or** means either of the conditions needs to be met.

   This applies to the row that and/or is on, and the next condition row following. If you have groups of conditions, it applies to each line in the group and then on the last line of the group, how it relates to the next group of condition values. On the last line in the group leave this box blank.

Example 1

➢ Your fund is only eligible for applicants that are Females living in Virginia. Therefore applicants would have to answer "Female" for the Gender Question, and "Virginia" for the state question.

➢ **Step 11:** Once you have created all the filters for that fund, click on Save and Exit. To save the filter and return to the Mange Fund Criteria listing.

➢ **Step 12:** Notice that once you set the criteria the "Set Criteria" will change to "View Eligibility Criteria" under the Eligibility Criteria column. You can click on the **View Eligibility Criteria** to go back in and make any changes to the conditions that you may have set.

➢ **Step 13:** Once applicants start applying you can go to the Manage Eligibility Criteria and view the applicants that have matched by clicking on the Scholarship Name.

Manage Scholarship Eligibility Criteria : Common Fund 1				
			Total records found: 1	Go Back
FirstName	LastName	EmailID	SSOID	Status
Christine	Smith	christines@communityforce.com		Request Pending

After you have performed these steps you can select the Fund Filter when setting up your **Evaluations Setup>Assignments** and assigning committee reviewers to applicants, as well as be able to select the fund in the **Manage Awards** when managing awards to see the listing of applicants eligible by that specific fund.