



community^{force}TM
SOFTWARE & SERVICES

Scholarship Management System
Training Guide
Module 8 – Evaluations – Applicant Status Report
Ver 7.5
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Prepared By:
community^{force}TM

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Module 8: Evaluations – Applicant Status Report

This module covers how to monitor the status of your applicants as they apply. You will learn how to review the applicant’s applications to confirm that all necessary data is being received and what status they are, in the application process. You will also learn how to communicate with your applicants using the notification center email templates, and release section back to the applicants to complete again.

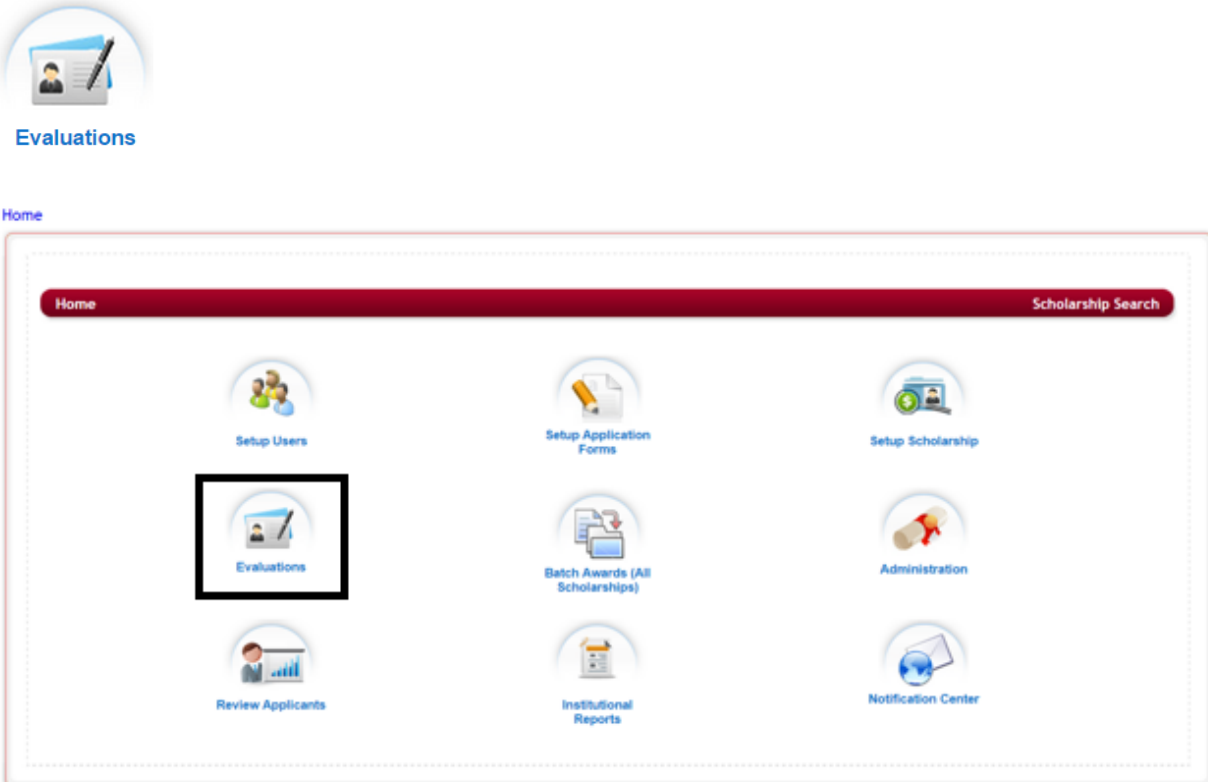
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1. Evaluations

The Evaluations dashboard is where you evaluate your applicants as they are applying, as well as monitor and set up your entire evaluation and awarding process. Every application form has its own Evaluations dashboard.

1.1 Accessing the Evaluations 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.



The screenshot shows the CommunityForce Home dashboard. At the top left, there is a circular icon for 'Evaluations' with a blue border and the word 'Evaluations' below it. Below this, the word 'Home' is visible. The main dashboard area is enclosed in a red border and contains a grid of icons: 'Setup Users', 'Setup Application Forms', 'Setup Scholarship', 'Evaluations' (highlighted with a black box), 'Batch Awards (All Scholarships)', 'Administration', 'Review Applicants', 'Institutional Reports', and 'Notification Center'. At the top right of the dashboard area, there is a 'Scholarship Search' button. At the bottom of the page, there is a navigation bar with links: 'CommunityForce | CommunityForce Training Site Database', 'Business Intelligence | Applications | Scholarship | Evaluations | Reports | Help | Logout'. The 'Evaluations' link in the navigation bar is highlighted with a black box.

- **Step 2:** This will direct you to the Evaluations application's listing. Select the application you want to evaluate by clicking on the application name under the Application Form Column.

Home > Evaluations

Evaluations

Search By:

Application Form: Scholarship: Sponsoring Organization: Search


Export to Excel Active

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

2. Monitoring an Applicant’s Status

The Applicant Status section is a report feature that allows you to monitor your applicant’s

activity and their current Status/Status Detail as the applications are being completed. It, also, allows you to view their Status and Status Details as they are moving through the entire application review and awarding process.

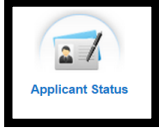





- **Step 1:** To access the Applicant Status report, select the **Applicant Status** icon from the application's **Evaluation** dashboard for the application you want to view.



Applicant Status

[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 3:** The Applicant Status report will open:

Applicant Status

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

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

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

Number Of Applicants: 17

Batch Student Info Update
Batch Admin PDF
Batch Reviewer PDF
Admin PDF
Applicant PDF
Reviewer PDF
Export To Excel

Import Application(s) Notify

Score Sheet	Applicant	Email	Blackbaud ID	Submitted Date & Time	Status	Status Detail	Released	Notification Date	Comments	Requested	Received	Is Paid	Payment Date
<input type="checkbox"/>	Arbo, Kiley				Withdrawn	-	No	-	Student withdrew application	100%	100%	No	
<input type="checkbox"/>	Cruz, Patricia			04/04/2014 05:17	Selected For Award	Final Award	No	-		75%	25%	No	
<input type="checkbox"/>	Day, Tright				Pending Submission	-	No	-		null	null	No	
<input type="checkbox"/>	Ellsworth, Carly				Pending Submission	Not Qualified	No	-	Did not include appropriate attachments	100%	25%	No	
<input type="checkbox"/>	Fry, Jonathan				Pending Submission	-	No	04/07/2014		100%	null	No	
<input type="checkbox"/>	Graves, Kathleen				Pending Submission	-	No	-		100%	null	No	
<input type="checkbox"/>	Gustitus, Anthony			04/01/2014 06:38	Under Committee Review	Final Award	No	-		100%	100%	No	
<input type="checkbox"/>	Kallin, Horne				Pending Submission	-	Yes	-		null	null	No	
<input type="checkbox"/>	Long, Michael				Pending Submission	-	No	-		null	null	No	
<input type="checkbox"/>	Males, Robert				Pending Submission	-	Yes	-		null	null	No	

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

Go to Page [Go](#) Page 1 of 2 Display Records per Page

2.1 Applicant Status Report Overview

The following columns are viewable in the Applicant Status Report:

- **Score Sheet:** From the Score Sheet you can see the committee scores, view a table view of the entire applicant’s application, and view attached documents.
- **Applicant:** Applicant’s name as it appears in their **user log-in account**. This is not the name they enter as part of a question in their application when filling out the actual application.
- **Email:** Applicant’s email as it appears in the **user log-in account**. Not the email that is entered as part of a question in their application when filling out the actual application.
- **Net ID:** This is an optional field and used to record an ID for your external site. If using integration to an external program this is the identifying ID on that external site. (i.e. Banner, PeopleSoft) **Note:** this column will not appear if you are not using this function and the Global Admin has not selected “yes” to activate in the **Administration>Site Setting: General Settings: Display SSO Id on all screens**.
- **Submitted Date & Time:** Once the applicant clicks the submit button on their dashboard and submits their completed application, this column will show the date and time that they submitted.
- **Status:** The current status category of the applicant. Where they are in the application process.

- **Status Detail:** The application status detail (stage) the applicant is currently in. This is a user defined field that may or may not be populated, depending on your process.
- **Released:** Shows if the administrator has released a section back to an applicant for completion. (for more information on how to release a section see the **Section Release** section in this module)
 - **Yes** - The section has been released and waiting for completion
 - **No** - There are no sections released for completion
- **Notification Date:** When an email is sent using the Notify button the date that the email was sent will appear here.
- **Comments:** Displays the comments that were recorded when the status/status detail was adjusted manually. When you hover over the comments that are visible, a box will appear showing the date and who entered the comment.
- **Requested:** When using Request Sections in an application, this column will show if the **applicant has requested** someone to complete the request section on their behalf, as well as show the percentage "%" of request they have requested.
 - **Null** - Applicant has not assigned an individual to complete any of the request sections. If there are no request sections in the application, then this will show as Null.
 - **100%** - Applicant has assigned all the request sections out to individuals to complete.
 - **% number less than 100 %** - Applicant has not assigned all their request section to individuals to complete.
- **Received:** When using Request Sections in an application, this column will show if the **assigned individual** has gone in and **completed** the request section on behalf of the applicant and clicked the submit on that section only.
 - **Null** - The assigned individual has not completed the request section on behalf of the applicant.
 - **100%** - All the assigned individuals have completed the request sections and clicked the submit on that section only
 - **% number less than 100%** - Means that not all the assigned individuals have completed the request sections.
- **Is Paid:** This will only display if you have a fee associated with the application form and your Global Admin has activated the payment feature in the **Administration>Site Settings: General Settings: Enable application Payments** by selecting "yes". Shows if the applicant has made the required payment for the application form.
- **Payment Date:** This will only display if you have a fee associated with the application form and your Global Admin has activated the payment feature in the **Administration>Site Settings: General Settings: Enable application Payments** by selecting "yes". Shows the date the payment was made.
- **"X" Delete: Use with Caution.** Allows you to delete an applicant's application form. Once it is deleted it cannot be retrieved.

- **Export to Excel** - allows you to export the Applicant listing report to excel and view an excel version of the Applicant Status Report.

Number Of Applicants: 14

- **Number of Applicants:** - this is the number of applicants being displayed in the report grid based on the Filter by Status/Status detail selection. If Filter by Status/Status detail is set to **All**, the Number of applicants will be the total number of applicants that have started the application form.

2.2 Searching For An Applicant

The screenshot shows a search interface for the Applicant Status report. It features a dark red header with the text 'Applicant Status'. Below the header is a search bar with the label 'Search By:' followed by four input fields: 'Last Name:', 'First Name:', 'Email:', and 'Blackbaud ID'. A red 'Search' button is located to the right of the input fields and is highlighted with a black border.

At the top of the Applicant Status report you can use the **Search By:** to search for a specific applicant. You can search on one of the items or all, by entering the data in the fields and clicking the **Search Button**.

- **Last Name**
- **First Name**
- **Email**
- **Net ID (if applicable)**

(Note: These items are looking for the **applicant data** that was created when the applicant created their **log-in account**, not the actual information that is entered in question fields within the application.)

2.3 Applicant Status Report - Status/Status Detail Functions

Status and Status Detail

As applicants move through the application process they're categorized into different stages called Status and Status Detail. Their status and status details is determined by where they are in the process.

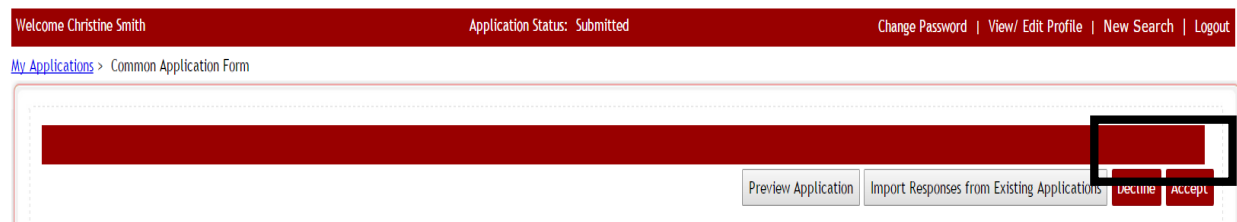
In the **Applicant Status Report**, the applicant's current status and status detail are shown in the **Status** and **Status Detail** columns.

Status and Status Detail Definitions

Status: The **Status** stage is a system defined status and usually is **automatically updated** as specific events occur.

- **Pending Submission** - The applicant has started their application but not yet submitted. (*Status is visible on Applicant's Dashboard*)

- **Submitted** - The applicant has completed their application and clicked the submit button on their dashboard. *(Status is visible on Applicant's Dashboard)*
- **Additional Info Requested** - The administrator has released a section back to an applicant that has already submitted their application, requesting that they complete the section and resubmit their application form. *(Status is visible on Applicant's Dashboard). Once the applicant re-submits the status will move back to Submitted.*
- **Withdrawn** - The applicant decides to withdraw their application by clicking the withdraw application option on their personal dashboard. *(Status is visible on Applicant's Dashboard)*
- **Under Committee Review** - Applicant has been assigned to a committee member for review. *(Status "not" shown on Applicant Dashboard. Applicant will continue to see Submitted.)*
- **Not Selected for Award** (not an automatic field) - Administrator must change manually when not selected for an award. *(Status not shown on Applicant Dashboard. Applicant will continue to see Submitted).*
- **Selected for Award** – When an applicant is awarded a **Final Award Amount** in the Batch Awards or Manage Awards section, the Status is automatically moved to Selected for Award. *(This status is not shown on the Applicant Dashboard. Applicant will continue to see Submitted, however their dashboard will now show **Decline and Accept** buttons as soon as they have moved or been moved to this status.)*



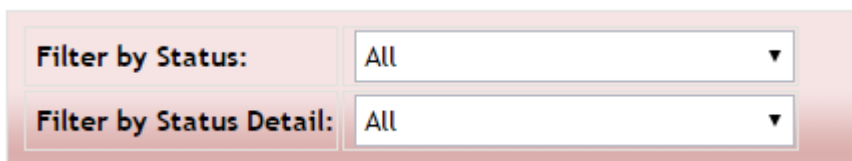
- **Award Accepted** – As soon as your applicant is moved to the status of “Selected for Award” their dashboard will automatically show the **Decline** and **Accept** buttons. When the applicant clicks on the Accept button they are moved automatically to the **Award Accepted** status. **See note below**
- **Award Declined** - As soon as your applicant is moved to the status of “Selected for Award” their dashboard will automatically show the **Decline** and **Accept** buttons. When the applicant clicks on the Decline button they are moved automatically to the **Award Declined** status. **See note below**

Note: Many times clients will also add an additional section that has been created with a status setting in the section setup Status(es) of *Selected for Award*. Once the applicant is moved to the status of *Selected for Award*, that section will appear in their dashboard, showing them the award they received as well as additional instructions on how to accept the award they have been awarded. They can then click the **Accept** or **Decline** button, and their status will change, notifying you that they have completed the section and clicked the Accept or Decline button in their dashboard.

- **Request Pending** – The applicant has submitted their application, and they have assigned all their request sections to be completed, but the individual(s) they requested to complete the section for them has not completed the request section. They can submit the application but the status will show as request pending until all the request sections have been completed (*Status is visible on Applicant Dashboard*)

Status Details: These are *custom* stages and applicants are only moved to a Status Detail manually, this is not automatic. (**Status Details must be created by the Global Admin in the Administration dashboard, please see your Global Admin if there is a status detail you would like to have added for your process**)

2.3.1 Filter By Status/Status Detail:



The image shows a user interface for filtering applicants. It consists of two rows of filter controls. The first row is labeled 'Filter by Status:' and has a dropdown menu currently showing 'All'. The second row is labeled 'Filter by Status Detail:' and also has a dropdown menu currently showing 'All'. The background is a light pinkish-red color.

When you first open the **Evaluations> Applicant Status** report “All” the applicants that have applied to the application will show in the report listing.

You can use the **Filter By Status** or **Filter by Status Detail** to search for a group of applicants based on a specific status or status detail and see only those applicants in that status/status detail.

You can select on both of the filters, or just one, depending on what group of applicants you want to view.

To filter by a specific Status/Status Detail:

1. Open the drop down menu next to the Status/Status Detail you want to filter on.
 2. Now select the Status item in the drop down menu
 3. Once you select status, the item system will automatically run the report to show only those applicants that meet that Status/Status Detail.
- **Note:** When filtering by Status there is the additional filter option to filter by both the Submitted and Request Pending together by selecting the filter of **Submitted/Request Pending**. This allows you to see all the applicants that have submitted their applications, including those that have submitted but are still waiting on their request section to be completed by the recommended individuals.

As you filter on the status the **Number of Applicants**, will also change to the number of applicants that are in the status/status detail you have filtered on.

Applicant Status

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

Filter by Status: Pending Submission
 Change Status to: Select
 Filter by Status Detail: All
 Change Status Detail to: Select

Number Of Applicants: 14

Score Sheet	Applicant	Email	Blackbaud ID	Submitted Date & Time	Status	Status Detail	Released	Notification Date	Comments	Requested	Received	Is Paid	Payment Date
<input type="checkbox"/>	Dwy, Tright				Pending Submission	-	No	-		null	null	No	X
<input type="checkbox"/>	Ellsworth, Carly				Pending Submission	Not Qualified	No	-	Did not include appropriate attachments	100%	25%	No	X
<input type="checkbox"/>	Fry, Jonathan				Pending Submission	-	No	04/07/2014		100%	null	No	X
<input type="checkbox"/>	Graves, Kathleen				Pending Submission	-	No	-		100%	null	No	X
<input type="checkbox"/>	Kallin, Horne				Pending Submission	-	Yes	-		null	null	No	X
<input type="checkbox"/>	Long, Michael				Pending Submission	-	No	-		null	null	No	X
<input type="checkbox"/>	Malec, Robert				Pending Submission	-	Yes	-		null	null	No	X
<input type="checkbox"/>	Martin, Juliet				Pending Submission	-	Yes	-		null	null	No	X

Report now only shows the Pending submission applicants.

2.3.2 Change Status/Status Detail To:

Change Status to:

Change Status Detail to:

In the **Evaluations>Applicant Status** report, you can use the **Change Status to/Status Detail**, to select an applicant(s) to manually change the current status of an applicant or group of applicants to another Status/Status Detail in the process.

The following will show how to move an applicant manually from Pending Submission to Submitted.

Note: this is for illustrative purpose and not something you would normally have to do, as the system will automatically move them to submitted once they have clicked the submit button in their application form and all request sections have been completed by the individual requested to complete. However, there are times when you may allow an applicant to be moved to submitted without having completed the application form, in that case you would have to manually submit their application by changing their status from Pending Submission to Submitted.

- **Step 1:** To change the status from one status to another you must first **Filter the Status/Status Detail** that the applicant is currently in by using the **Filter by Status/Status Detail**.

Filter by Status: Pending Submission ▼
 Filter by Status Detail: All ▼

- **Step 2:** Select the applicant(s) you want to move, by putting a check in the box next to that applicant(s) name.

Score Sheet	Applicant	Email	Blackbaud ID	Submitted Date & Time	Status	Status Detail	Released	Notification Date	Comments	Requested	Received	Is Paid	Payment Date
<input checked="" type="checkbox"/>	Smith, Christine	christines@communityforce.com		06/30/2015 14:52	Pending Submission	-	No	-	test nsfa	null	null	No	

Select: All | None

- **Step 3:** Once you have selected the applicant(s), click the drop down arrow in either the **Change Status To** or **Change Status Detail** to fields and select the new status/status detail you want to move the applicant to.

Change Status to: Submitted ▼ **Change Applicant Status**
 Change Status Detail to: Select ▼ **Change Applicant Status Detail**

- **Step 4:** Once you have selected the change status or status detail, click on the button next to that field, **Change Applicant Status** or **Change Applicant Status Detail**, depending on which one you're wanting to change.

- **Step 5:** A **Change Applicant Status** box will appear for you to enter the reason for the Status/Status Detail Change. Enter your comment and click Save to save the change or Cancel to cancel the Status/Status Detail Change. If you do not want to enter a comment, you will still need to click save to save the change.

Change Applicant Status

Change Status To: Submitted

Status Change Comments:
 Manually moving the applicant to submitted as they have been approved to continue without having to complete their application form in full. - changed by Csmith

Save ▶ Cancel ▶

- **Step 6:** Once you return to the Applicant Status report the status or status detail of the applicant will now be updated to the new status/status detail. If you entered a comment in the comment box

that comment will now display in the comment column for that applicant, you can view all the comments by hovering over the comment that is currently showing in the comment column.

2.4 Applicant Status Report - Viewing Applicant's Dashboard/Staff Sections

There are occasions when it is necessary to view the applicant's dashboard from their perspective and to be able to edit or complete questions within the sections.

For example:

- 1) You have created **Staff Sections** to be completed by Staff.
- 2) The applicant needs assistance uploading a document to their application or answering a specific question.
- 2) You need to see the documents that have been uploaded.
- 3) You need to see who they have recommended for a request section.
- 3) You need to see if the recommender accepted or declined the request from the applicant.

Note: In order for you to edit an application or section after the deadline or the applicant has submitted their application, you will need to make sure that your Global Admin has set the setting in the **Administration Dashboard > Site Settings: General Settings: Disable Section Locks for Admin:** to "Yes". (The only exception to this is Staff Sections, which can be edited after the deadline, even if not disabled if you have set the setting on that specific section to allow edits after submittal.)

To view the Applicant's Dashboard:







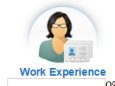



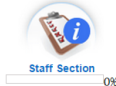
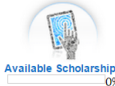


- **Step 1:** Locate the applicant in the Applicant Status Report grid.
- **Step 2:** Under the column "Applicant" click on the applicant's name

- **Step 3:** The applicant’s dashboard will open showing all the icons that are available in the application. Only the sections that the applicant is required to answer will appear. The applicant's name should be in the header at the top of this dashboard

Applicant: Smith, Christine Application Status: Submitted

Request Sections Preview Application

Instructions
Please click on each icon below and answer each of the questions in each section.

 General Information 0%	 Family Information 0%	 Education Information 0%	 Financial Information 0%	 School and Community Activities 0%
 Academic Honors 0%	 Work Experience 0%	 Additional Information 0%	 Student Signature 0%	 Teacher Recommendation Request Section 0%
 Staff Section 0%	 Available Scholarships 0%	 Testing New Section 17%	 AwardAccepted 0%	

Request Sections

- **Step 4:** Click on any of the Section Icons to update or view that section. Be cautious in making changes as any change you make is changing their replies in their application. Remember to click **Save or Save & Return to Dashboard** to save any changes you want to keep prior to leaving the section. If you do not want to save any changes click the Discard changes and return.

Save ▶ Save & Return to Dashboard ▶ Discard changes and return ▶

- **Step 5:** If you have a **Staff Section** open that section and complete it from this dashboard.
- **Step 6:** To view the **Request Sections**, and see who the applicant has recommended to complete, click the Request Sections Button located on the dashboard.

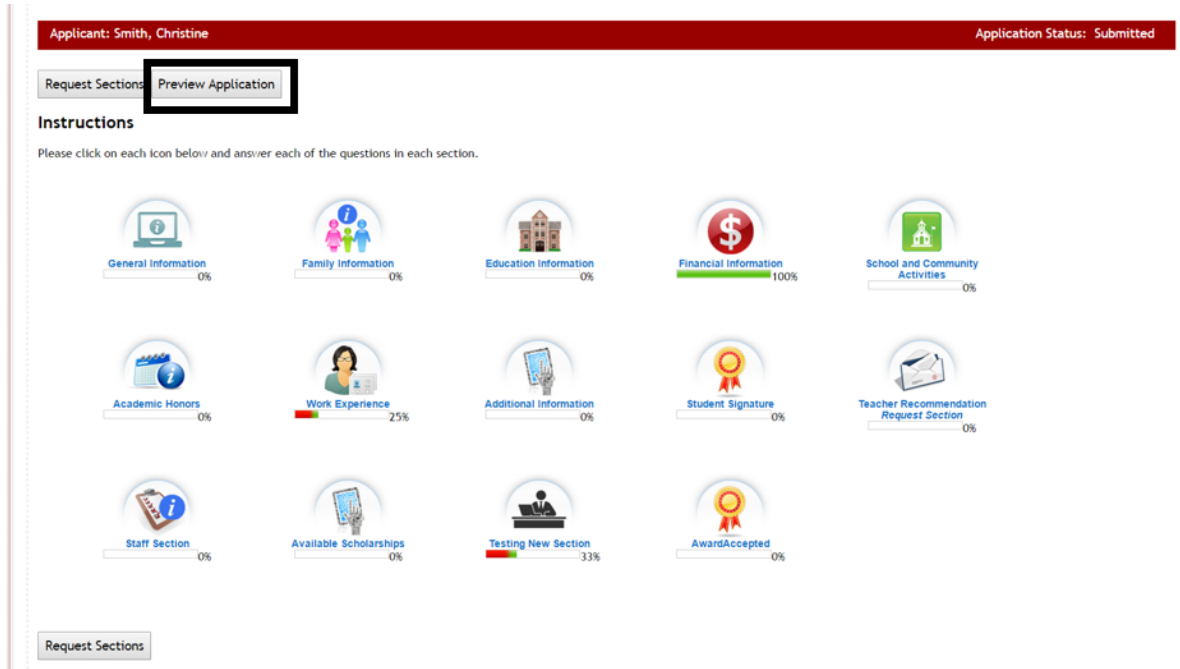
Request Sections

- **Step 7:** This will show any recommendations the applicant has made and the current status of this request. Click the “Return to Dashboard” to go back to the applicant’s dashboard.

Request For	Requested From	Email	Status	Requested Date	Received Date
Teacher Recommendation	John	Jones@cf.com	Requested	01 Jul 2015	

Return To Dashboard ▶

- **Step 8: Viewing attached documents** – While in the applicant’s dashboard you can view all the attached documents by clicking on the **Preview Application** button.



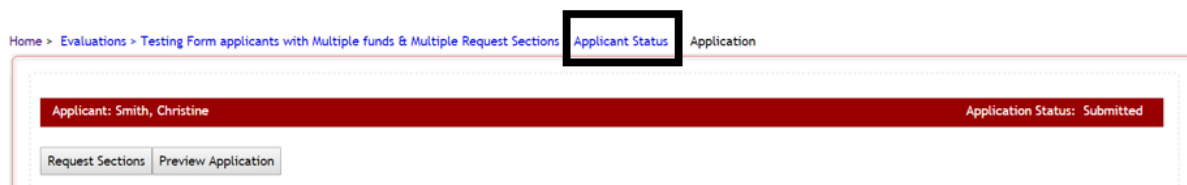
- **Step 9:** This will open a new window in your browser displaying a printable summary of the application. You can view the document by scrolling to the actual question where the upload was received,

* File Document upload Please upload a copy of your FAFSA:	www.irs.gov/pub/irs-pdf_fw4.pdf
--	--

Or by scrolling to the end of the application form and viewing all the attached documents.

Document Title	Question	Date Uploaded
www.irs.gov/pub/irs-pdf_fw4.pdf	FAFSA Upload	7/1/2015 3:05:06 PM

- **Step 10:** You will need to then click on the attached document to view it.
- **Step 11:** close this window to return to the applicant’s dashboard.
- **Step 12:** While in the applicant’s dashboard, you can click on the Applicant Status at the top of the page in the breadcrumb navigation, and return to the Applicant Status report to view another applicant.



2.5 Viewing the Score Sheet

From the **Evaluation>Applicant Status** report you can see how the applicant has scored for the specific tasks that have been created during the evaluation process.

- **Step 1:** Click on the **Score Sheet** next to the applicant's name in the Applicant Status report grid.

Number Of Applicants: 17		Batch Student Info Update	Release Section(s)	Batch Admin PDF	Batch Reviewer PDF	Admin PDF	Applicant PDF	Reviewer PDF	Export To Excel	Import Application(s)	Notify		
Score Sheet	Applicant	Email	Blackbaud ID	Submitted Date & Time	Status	Status Detail	Released	Notification Date	Comments	Requested	Received	Is Paid	Payment Date
	Arbo, Kiley			03/27/2014 12:13	Under Committee Review	-	No	04/02/2014		100%	100%	No	X
	Cochran, Michael				Pending Submission	-	No			50%	null	No	X

- **Step 2:** This will open the Applicant Score Card, showing all the Tasks the applicant has been assigned to, the Reviewer assigned, the percentage of completion, the total score by that reviewer, and any comments that were included by the reviewer.

Applicant Score Card							
Filter By Task Name		Search		View Application	Admin PDF	Reviewer PDF	Export to Excel
Applicant Name: Arbo, Kiley							
Task	Task Name	Reviewer	Email	Complete	Total Score	Scoring Comment	
<input type="checkbox"/>	1 Merit Score	Cochran, Michael	Michael1@Communityforce.com	0 %	0		
<input type="checkbox"/>	1 Merit Score	Support, CommunityForce	Support@Communityforce.com	0 %	0		
<input type="checkbox"/>	2 Financial Need Score	Cochran, Michael	Michael5@Communityforce.com	0 %	0		
<input type="checkbox"/>	2 Financial Need Score	Support, CommunityForce	Support@Communityforce.com	0 %	0		
Total Score:					0.00		
Select: All None							

This report listing can be viewed online or exported and viewed in excel by clicking on the **Export to Excel** button.

Note: If you have not created scoring tasks the score card will appear as blank.

- **Step 3:** If you want to see how a specific reviewer scored the applicant you can click on the **Task Name** for the listing that has that reviewers name listed in the Reviewer column or on the actual score in the **Total Score** column.

Applicant Score Card

Filter By Task Name : All Search View Application Admin PDF Reviewer PDF Export to Excel

Applicant Name: Arbo, Kiley

Task	Task Name	Reviewer	Email	Complete	Total Score	Scoring Comment
<input type="checkbox"/>	1 Merit Score	Cochran, Michael	Michael1@Communityforce.com	0%	0	
<input type="checkbox"/>	1 Merit Score	Support, CommunityForce	Support@Communityforce.com	0%	0	
<input type="checkbox"/>	2 Financial Need Score	Cochran, Michael	Michael5@Communityforce.com	0%	0	
<input type="checkbox"/>	2 Financial Need Score	Support, CommunityForce	Support@Communityforce.com	0%	0	
Total Score:						

Select: All | None

- **Step 4:** To view a specific task, click on the dropdown for **Filter by Task name** and select the task you want to view and click **Search**.

Applicant Score Card

Filter By Task Name : All Search View Application Admin PDF Reviewer PDF Export to Excel

Applicant Name: Arbo, Kiley

Task	Task Name	Reviewer	Email	Complete	Total Score	Scoring Comment
<input type="checkbox"/>	1 Merit Score	Cochran, Michael	Michael1@Communityforce.com	0%	0	
<input type="checkbox"/>	1 Merit Score	Support, CommunityForce	Support@Communityforce.com	0%	0	
<input type="checkbox"/>	2 Financial Need Score	Cochran, Michael	Michael5@Communityforce.com	0%	0	
<input type="checkbox"/>	2 Financial Need Score	Support, CommunityForce	Support@Communityforce.com	0%	0	
Total Score:					0.00	

Select: All | None

- **Step 5:** You can also click on the **View Application** button in this section to see a printable table view of the applicant’s application form or you can click the **Admin Pdf** or **Reviewer Pdf** to get a pdf version of the application.

2.6 Creating a PDF of the Applicant’s Application

There are occasion when you will need to create a PDF copy of the applicant’s application form.

While in the **Evaluations>Applicant Status** report you will notice five separate buttons for creating PDFs of the applicant’s application.

Applicant Status

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

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

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

Number Of Applicants: 1 Batch Student Info Update Release Sections Batch Admin PDF Batch Reviewer PDF Admin PDF Applicant PDF Reviewer PDF

To create a PDF of an applicant’s application you will need to **select the applicant(s)** you want the pdf for by checking the box next to the name of the applicant and then selecting the appropriate button for the PDF type you are wanting to create.

Score Sheet	Applicant	Email	Blackbaud ID	Submitted Date & Time	Status	Status Detail	Released	Notification Date	Comments	Requested	Received	Is Paid	Payment Date
<input checked="" type="checkbox"/>	Smith, Christine	christines@communityforce.com		07/01/2015 14:33	Withdrawn	-	No	-	test nsfa	100%	null	No	

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

Important Note: If you application form is still live when creating PDF’s there is a one minute delay from the applicants entering data on a live application, before uploads will appear in the PDF Document.

Admin PDF: Creates a combined PDF of the applicant's entire application and all uploaded attachments. This PDF will shows all the questions and sections in the application form. All hidden questions will be included with the exception of encryptedfield question type.

Note: If you application has encryptedfield questions, only the Global Admin can run a Admin PDF that includes those question. All other role types that have access to areas that have the Admin PDF option, will get all the questions *except* the encryptedfield questions.

Applicant PDF: Creates a combined PDF of the applicant's application and uploaded attachments. All questions and sections marked “hidden from applicant” will not be viewable. It also, will not show any questions triggered by conditions that they did not answer, replies to request sections, and entries for staff sections.

Reviewer PDF: Creates a combined PDF of the applicant's application and uploaded attachments. It will not show any question from staff sections or any question marked as **hide from reviewer**.

2.6.1 Batch PDF’s



Batch PDF’s allow you to select multiple applicants, to create a batch folder of the PDF documents. The batch PDF will download a folder that you can save to your own computer with a separate PDF document for each applicant you selected.

Name	Type	Compressed size	Password ...	Size	Ratio	Date modified
Arbo, Kiley_fd8120	Adobe Acrobat Document	16 KB	No	18 KB	13%	5/12/2015 12:04 PM
Cruz, Patricia_be1d7a	Adobe Acrobat Document	21 KB	No	24 KB	15%	5/12/2015 12:04 PM
Day, Tnight_2f7ada	Adobe Acrobat Document	6 KB	No	7 KB	14%	5/12/2015 12:04 PM

To create a batch pdf, select all the applicant’s you want to include in the batch folder by checking the box next to each applicants name. Then click either the Batch Admin PDF or Batch Reviewer PDF button.

Batch Admin PDF – creates a batch PDF of the Applicant’s application showing only the items viewable to the Administrators.

Batch Reviewer PDF – creates a batch PDF of the Applicant’s application showing only the items viewable by the Reviewers. Questions marked as “Hidden from Reviewer” will not be included.

2.7 Applicant Status–Email Notifications

While in the **Evaluations>Applicant Status** report you can send notification emails to your applicants, instead of doing so in the Notification center.

- **Step 1:** While in the Applicant Status report, select the applicant(s) you want to send the notification to, and then click the Notify button.

Note: if you select **All** at the bottom of a page, it will only select the applicants on that page. If you have multiple pages of applicants, you will need to notify the applicants separately on each individual page. If you want to do all your applicants, it is best to change the *Display Records per Page to ALL*, then select the All in the selection, to get all your applicants at one time.

Score Sheet	Applicant	Email	Blackbaud ID	Submitted Date & Time	Status	Status Detail	Released	Notification Date	Comments	Requested	Received	Is Paid	Payment Date
<input checked="" type="checkbox"/>	Smith, Christine	christines@communityforce.com		07/01/2015 14:33	Withdrawn	-	No	-	test nsfa	100%	null	No	

- **Step 2:** The Notification email box will open where you can create the email you want to send:

Notification

Schedule The Email Send Now Preview Cancel

*From: scholarships@communityforce.com

*To: christines@communityforce.com

This should list all the email addresses for all the applicants you selected in the Applicant status report.

Mail Format: HTML

*Subject: Email Subject

Email Template: ---Select---

*Body:

Available Merge Fields

- *Applicant FirstName {FirstName}
- *Applicant LastName {LastName}
- Applicant Email {EmailID}
- *Grants/Fellowship Name {Grants/Fellowships Name}
- Application Name {Application Name}
- Application Deadline Date {Deadline Date}
- Additional Optional Details {Comments}
- Application Contact Person First Name {Contact First Name}
- Application Contact Person Last Name {Contact Last Name}
- Application Contact Email {Contact Email}

Enter the message to the applicant.

Schedule The Email Send Now Preview Cancel

- **Step 3: Subject:** enter the subject line that you want the applicant to see in the mailbox.
- **Step 4: Email Template:** You can select from one of your existing email template, or leave this as select and create a new email just for this mailing.
- **Step 5: Body:** Enter your message into the editor box.

Available Merge Fields for Custom generated templates:

To the left of the editor’s box are Available Merge Fields that you can copy and paste into your email. When you send an email, these fields will automatically be populated with the desired data. For example, if you choose {First Name}, it will automatically change to the applicant’s actual First Name, while sending a mail.

Simply highlight the merge field, right click, copy and paste into the body of your email. Be sure to select the brackets {} as part of the field, that are in the beginning and end of the field.

Note: Use caution not to add extra spaces or delete any of the field when copying it. Each template has certain Merge fields available if the field you are looking for is not listed in the column to the left, then it is not available for this specific template.

- **Step 6:** You can schedule the email to go out at a later date by selecting the **Schedule The Email** button, or you can send it immediately by clicking on the **Send Now** button.
- **Step 7:** Once you return to the Applicant Status report, the Notification Date column will now display the date of the last email notification sent to that applicant.

Score Sheet	Applicant	Email	Blackbaud ID	Submitted Date & Time	Status	Status Detail	Released	Notification Date	Comments	Requested	Received	Is Paid	Payment Date
	Smith, Christine	christines@communityforce.com		07/01/2015 14:33	Withdrawn	-	No	07/01/2015	test nsfa	100%	null	No	

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

2.8 Import Applications

Import Applications allows you to import a batch of applications from an Excel document into the appropriate application process.

- **Step 1:** While in the **Evaluations>Applicant Status** report for the application you want to import the applications to, select the Import Applications, button



Applicant Status

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

Filter by Status: Change Status to:
 Filter by Status Detail: Change Status Detail to:

Number Of Applicants: 1

Score Sheet	Applicant	Email	Blackbaud ID	Submitted Date & Time	Status	Status Detail	Released	Notification Date	Comments	Requested	Received	Is Paid	Payment Date
<input checked="" type="checkbox"/>	<input type="checkbox"/> Smith, Christine	christines@communityforce.com		07/01/2015 14:33	Withdrawn	-	No	-	test nsfa	100%	null	No	

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

Go to Page Go Page 1 of 1 Display Records per Page

➤ **Step 2:** A box will appear where you can upload your Excel File.

Import Application(s)

Select Excel File [Click here to download Application\(s\)](#)

➤ **Step 3:** Click the “Click here to download Application(s)” to download a pre-formatted Excel document that contains **all** the current applicant data showing all the applicants that have applied already and fields that have been created in your online application. (This downloaded document can also be used to upload information to your external program, i.e. FIMS)

CFCompletionID	CFApplicationName	CFEmailID	CFSSOID	CFFirstName	CFLastName	CFFundName
7e1f92c7-bde5-4dc2-bef8-8809f4d8a14	Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections	Anthony.Gusttus@gmail.com		Anthony	Gusttus	Scholarship for organization accepting High School applicants with Multi
ab194888-0657-4d5f-8a38-14379e0c1017	Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections	April.White@gmail.com		April	White	Scholarship for organization accepting High School applicants with Multi
214a3374-0446-430d-aef0-4c3d06aa1b57	Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections	Carly.Ellsworth@gmail.com		Carly	Ellsworth	Scholarship for organization accepting High School applicants with Multi
0d7b3fbb-5c38-43ce-a65d-c8f416899680	Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections	christines@communityforce.com		Christine	Smith	Scholarship for organization accepting High School applicants with Multi
c00b140-178d-4c9f-bc2b-0c5270ce91de	Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections	Christopher.Mulhall@gmail.com		Christopher	Mulhall	Scholarship for organization accepting High School applicants with Multi
265cc2b3-2ae6-480b-bb37-18a8de641faa	Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections	Collin.Mix@gmail.com		Collin	Mix	Scholarship for organization accepting High School applicants with Multi
2eda0f67-4697-498d-948d-c84f0ec8375f	Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections	Desiree.Thomas@gmail.com		Desiree	Thomas	Scholarship for organization accepting High School applicants with Multi
b87b3c53-8d0f-4a93-ad4f-600795552c5	Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections	horne.kallin@yahoo.com		Horne	kallin	Scholarship for organization accepting High School applicants with Multi
c5b39099-8ae8-4e8a-8b4b-a4e1241b2883	Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections	Jonathan.Fry@gmail.com		Jonathan	Fry	Scholarship for organization accepting High School applicants with Multi
3f72906c-4065-4ee9-ba60-cf34792b5170	Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections	Juliet.Martin@gmail.com		Juliet	Martin	Scholarship for organization accepting High School applicants with Multi
d2b24836-4c09-452d-9dab-27b2b265c6a5	Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections	kathleen.Graves@gmail.com		Kathleen	Graves	Scholarship for organization accepting High School applicants with Multi
e34e9380-ded7-43aa-e5cb-bb7a6408e80a	Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections	Kiley.Arbo@gmail.com		Kiley	Arbo	Scholarship for organization accepting High School applicants with Multi
4c0c9659-0c08-40a4-9647-80378645e043	Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections	magspugh@gmail.com		Maggie	Pugh	Scholarship for organization accepting High School applicants with Multi
1e24f797-7443-4880-9409-9536bd453c2a	Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections	Michael.Long@gmail.com		Michael	Long	Scholarship for organization accepting High School applicants with Multi
0431459d-e641-40cb-b28c-c36cd7076e2	Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections	Patricia.Cruz@gmail.com		Patricia	Cruz	Scholarship for organization accepting High School applicants with Multi
17104a0bbc-d622-416e-b1e0-0e78238dd609	Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections	Robert.Malec@gmail.com		Robert	Malec	Scholarship for organization accepting High School applicants with Multi
9b356d2b-6931-4f8d-af32-a38bc5347d62	Form for organization accepting High School applicants with Multiple funds & Multiple Request Sections	trnight.day@gmail.com		Trnight	Day	Scholarship for organization accepting High School applicants with Multi

It is advisable to first create a copy of this document before making any changes so that you have a backup copy you can convert back to, if needed, as this will overwrite any existing data already in the applicant's applications.

Note: when completing this form, if any of the fields are multiple choice selection fields (i.e. Dropdowns, checkboxes, radio buttons), be sure to input the data exactly how it appears as a selection in the multiple choice question of the application. **Any existing data that you change on existing applicants will overwrite their data in their original application, when this document is uploaded back to the system.**

This form can also be used to complete a batch of questions that the administrator may have to input, (i.e. questions in a staff section). You can enter the replies into this form under the column for that question and then re-upload the document to have the replies automatically input into that question on the online application. *Use caution when using this function as you do not want to accidentally change an applicant's reply.*

- **Step 4:** Once you have populated that Excel document with the applications you want to import, you can then upload that document by clicking on the **Upload Excel File**. This will then enter the information back into the application and add any new applicant(s) that had been input onto the Excel Document.

2.9 Import Applicant Data

This is a special feature that will require CommunityForce to activate.

Import Applicant Data allows the functionality to be able to copy all the applicant data from one application to another application.

This is useful if you open an application multiple times within an academic year and want to include the applicants that applied in one period into the next application period without having to reapply.

This feature is located in the **Evaluations>Applicant Status**.

- **Step 1:** To import this data, select the **new application** that you want to **import the data into** under **Evaluations** and then select the **Applicant Status** icon in that dashboard.

The screenshot shows the 'Applicant Status' page. At the top, there is a search bar with fields for 'Last Name', 'First Name', and 'Email'. Below this are filter options for 'Filter by Status' and 'Filter by Status Detail'. A row of buttons includes 'Batch Student Info Update', 'Batch Admin PDF', 'Batch Reviewer PDF', 'Admin PDF', 'Applicant PDF', 'Reviewer PDF', and 'Import Applicant Data' (highlighted with a red box). Below the buttons is a table with columns: Applicant, Email, Submitted Date & Time, Status, Status Detail, Released, Notification Date, Comments, Requested, and Received. The table contains six rows of applicant data. At the bottom, there is a 'Go to Page' field and a 'Display' dropdown set to '10 Records per Page'.

➤ **Step 2: There are two ways to import data:**

- 1) **Applicant has already applied to the new application** and you want to only push the data down for those applicant's that have applied.
 - a. In the new application, **select the applicant's** first by putting a check in the box next to the name of the applicant.
 - b. Click the **Import Applicant Data** button. A new box will appear.

The 'Import Applicant Data' dialog box has a red header. It contains the following elements:

- 'Application Name (Source):' dropdown menu with 'Financial Aid Recipient Application Form' selected.
- 'Sections:' dropdown menu with 'GeneralInformation, EducationInformation, A' selected.
- 'Import Applicants:' checkbox, which is currently unchecked.
- 'Import Data' button with a right-pointing arrow.
- 'Cancel' button with a right-pointing arrow.

- c. Select the Source Application (the application that you want to push the data down from).
- d. Select all the sections from the source application you want to push down.

Note: the XML names must match exactly, therefore only the Section and Field XML names in the Source application that are the same in the Destination application will be pushed down.
- e. **Do Not** check the box Import Applicants.
- f. Click the Import Data button (all the data from the source application will now be pushed down to the new application for only the applicants selected).

Note: You can also use this to push data down for just a **specific section**. (i.e., staff section data from one application to another. The applicant has already applied in the destination application and you want to push the data from the source application's staff section down to the new application to keep history intact)

- 2) The applicants **have not yet applied** and you want to **push all the applicants** from the first application into the new application.
 - a. Open the new application and click on the **Import Applicant Data** button. A new box will open.

- b. Select the Source Application (the application that you want to push the data down from)
- c. Select all the sections from the source application you want to push down.

Note: the XML names must match exactly, therefore only the Section and Field XML names in the Source application that are the same in the Destination application will be pushed down.
- d. **Check the box** Import Applicants.
- e. The **Status and Status Detail** fields will appear. If you want to only import applicants from the source application that are a specific status or status detail, click the dropdown arrow in the field and select the appropriate status or status detail. Click ok in the dropdown listing to save that selection. If you do not want a specific status or status detail, do not select any items and go to the next step.

Import Applicant Data

You are trying to import data into Stage 2 Scholarship Application 2016 from

Application Name (Source):

Sections: ▼

Import Applicants:

Status: ▼

Status Detail: ▼

- f. Click the Import Data button (**all the applicants** and the data from the source application will now be pushed down to the new application for only the applicants selected).
- g. All the applicants that have been pushed down will show a status of "Pending Submission".
- h. The applicant will now have this new application in their My Applications Dashboard. (this will automatically start the application for the applicants but will not submit their application) The applicant will need to go in and complete any additional questions in the new application and click submit on the new application.

2.10 Batch Student Info Update

Used when integrating with an external system, i.e. Banner, PeopleSoft.

The Batch student Info Update will only be available on those sites that have integration with their external database.

When you click the button it will update all the student application data with data from the external site. This data is not automatically updated and therefore you will need to click this button to update.

While in the **Evaluations>Applicant Status Report**, select the applicant(s) that you want to update and click on the **Batch Student Info Update** button.

Applicant Status

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

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

Number Of Applicants: 1

Score Sheet	Applicant	Email	Blackbaud ID	Submitted Date & Time	Status	Status Detail	Released	Notification Date	Comments	Requested	Received	Is Paid	Payment Date
<input checked="" type="checkbox"/>	Smith, Christine	christines@communityforce.com		07/01/2015 14:33	Withdrawn	-	No	-	test nsfa	100%	null	No	

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

3. Section Release

3.1 Introduction to Section Release

Once an application has been **submitted**, and you have disabled the ability to edit after an application has been submitted, the applicant can no longer make editions to their application form. The **Section Release** allows you to release sections of the application back to the applicants, so that they can re-enter information after they have submitted their application.

This is useful when an applicant contacts you realizing they did not answer a question correctly due to misinterpretation, they uploaded the wrong documents, or when reviewing the application you find missing or additional information that you need from the applicant.

Applicants with a status of **pending submission cannot** have a section released. An applicant must at least have a status of submitted in order to have a section released back to them.

3.2 Accessing the Section Release

Section Release can be accessed in two different locations:

- 1) Evaluations>Applicant Status report
 - a. Select the **Yes/No** under the Released column for the applicant you want to release the section for.

Applicant Status

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

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

Number Of Applicants: 1

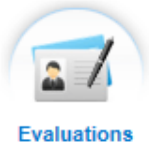
Score Sheet	Applicant	Email	Blackbaud ID	Submitted Date & Time	Status	Status Detail	Released	Notification Date	Comments	Requested	Received	Is Paid	Payment Date
<input type="checkbox"/>	Smith, Christine	christines@communityforce.com		07/01/2015 18:40	Submitted	-	No	07/01/2015	test.rofa	100%	null	No	

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

Go to Page Go Page 1 of 1 Display Records per Page

2) Evaluations>Section Release

➤ **Step 1:** From the **Home** page select **Evaluations**.



Home

Home Scholarship Search

Setup Users

Setup Application Forms

Setup Scholarship

Evaluations

Batch Awards (All Scholarships)

Administration

Review Applicants

Institutional Reports

Notification Center

➤ **Step 2:** In the Evaluation Application listing, select the application you want to release the sections on.

Home > Evaluations

Evaluations					
Search By:					
Application Form:	Scholarship:	Sponsoring Organization:	<input type="button" value="Search"/>		
		Select			
<input type="button" value="Export to Excel"/> Active					
Application Form	Scholarship	Sponsoring Organization	Start Date	Deadline	
Master Template			N/A	N/A	
2015 Application			06/09/2015	06/26/2016	✘
		My Organization Name 8 My Organization Name 4 My Organization Name 5 Test			
2015 Common Application form	Common Application Form	My Organization Name 1 My Organization Name 3 My Organization Name 10 My Organization Name 11 My Organization Name 7 My Organization Name 9 My Organization Name 6 Community Foundation of Rappahannock River My Organization Name 2	N/A	N/A	✘
2015-2016 Application For all funding	2015-2016 Scholarship Application for all funding	My Organization Name 1 Test	06/12/2015	06/01/2016	✘


➤ **Step 3:** The Evaluation dashboard will open, select the Section Release icon




Section Release

Home > Evaluations > Form for organization accepting Graduates based on Merit and Financial need


Form for organization accepting Graduates based on Merit and Financial need




Applicant Status




Evaluation Setup




Evaluate Applicants



Reports



Section Release



Notification Center

➤ **Step 4:** The following Section Release screen will display:

Section Release

Number of Records: 16 Status: All Search Export to Excel

	Applicant	Email	Blackbaud ID	Released	View Application
<input type="checkbox"/>	Arbo, Kiley	Kiley.Arbo@gmail.com		No	View Application
<input type="checkbox"/>	Cochran, Michael	Michael@Communityforce.com		No	View Application
<input type="checkbox"/>	Cruz, Patricia	Patricia.Cruz@gmail.com		No	View Application
<input type="checkbox"/>	Day, Tnigh	tnight.day@gmail.com		No	View Application
<input type="checkbox"/>	Fry, Jonathan	Jonathan.Fry@gmail.com		No	View Application
<input type="checkbox"/>	Graves, Kathleen	Kathleen.Graves@gmail.com		No	View Application
<input type="checkbox"/>	Gustitus, Anthony	Anthony.Gustitus@gmail.com		No	View Application
<input type="checkbox"/>	kallin, Horne	horne.kallin@yahoo.com		No	View Application
<input type="checkbox"/>	Knoc, Michelle	knox.michelle@live.com		No	View Application
<input type="checkbox"/>	Long, Michael	Michael.Long@gmail.com		No	View Application

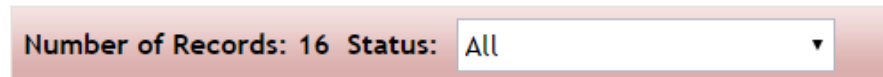
Go to Page 1 Go Page 1 Of 2 Display 10 Records per Page

Applicants with editable Sections Number of Records: 1 Search Export to Excel

	Applicant	Email	Blackbaud ID	Released Sections	Date Email Sent	Released	Comments
<input type="checkbox"/>	Ellsworth, Carly	Carly.Ellsworth@gmail.com		Reference Gamma Phi Beta	05/05/2014	Yes	Comments

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

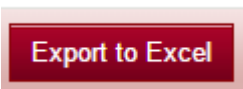
Number of Records: You can filter for applicants with a specific **status** from the status dropdown and can view all the applicants falling under that status category. The number listed is the number of applicants according to the status selected. All is the default.



- Applicant** - click on the applicant name to look to look at the applicant dashboard
- Email** - is the email address that the release request will be sent to.
- Released** – Current release status of the applicant No means the applicant does not have any released sections.
- View Application** – click on the view application link to view the applicant’s application summary report.

The top section of the screen will show you all the applicants listed that have do not have a section released and the bottom section shows the applicants that currently have sections that have been released and need to be edited.

Export to Excel:

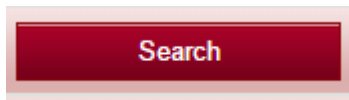


You can export the entire listing of applicants by clicking on Export to Excel button.

3.3 Searching for an applicant in Section Release

While in the Evaluations>Section Release, you can do a Search and find a specific applicant that has applied for this application. You can search applicants that have not been released as well as on applicant that have sections released to be edited.

- **Step 1:** Click the **Search** button located at the top of the section you want to search on:



Home > Evaluations > Form for organization accepting Graduates based on Merit and Financial need > Section Release

Section Release

Number of Records: 16 Status: All

	Applicant	Email	Blackbaud ID	Released	View Application
<input type="checkbox"/>	Arbo, Kiley	Kiley.Arbo@gmail.com		No	View Application
<input type="checkbox"/>	Cochran, Michael	Michael@Communityforce.com		No	View Application
<input type="checkbox"/>	Cruz, Patricia	Patricia.Cruz@gmail.com		No	View Application
<input type="checkbox"/>	Day, Tright	tright.day@gmail.com		No	View Application
<input type="checkbox"/>	Fry, Jonathan	Jonathan.Fry@gmail.com		No	View Application
<input type="checkbox"/>	Graves, Kathleen	Kathleen.Graves@gmail.com		No	View Application
<input type="checkbox"/>	Gustitus, Anthony	Anthony.Gustitus@gmail.com		No	View Application
<input type="checkbox"/>	Kallin, Home	home.kallin@yahoo.com		No	View Application
<input type="checkbox"/>	Knoc, Michelle	knox.michelle@live.com		No	View Application
<input type="checkbox"/>	Long, Michael	Michael.Long@gmail.com		No	View Application

Go to Page 1 Go Page 1 Of 2 Display 10 Records per Page

Applicants with editable Sections

Number of Records: 1

	Applicant	Email	Blackbaud ID	Released Sections	Date Email Sent	Released	Comments
<input type="checkbox"/>	Ellsworth, Carly	Carly.Ellsworth@gmail.com		Reference Gamma Phi Beta	05/05/2014	Yes	Comments

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

- **Step 2:** A new window will open up. Enter the one or all of the search criteria and click on Search button to find that particular applicant(s) with that search criteria.

Search ✕

First Name:

Last Name:

Email ID:

[Search](#)

- **Step 3:** Only the applicants that match the search criteria will appear in the section listing that you searched on:

Section Release

Number of Records: 1 Status: All

	Applicant	Email	Blackbaud ID	Released	View Application
<input type="checkbox"/>	Smith, Christine	christines@communityforce.com		No	View Application

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

Applicants with editable Sections

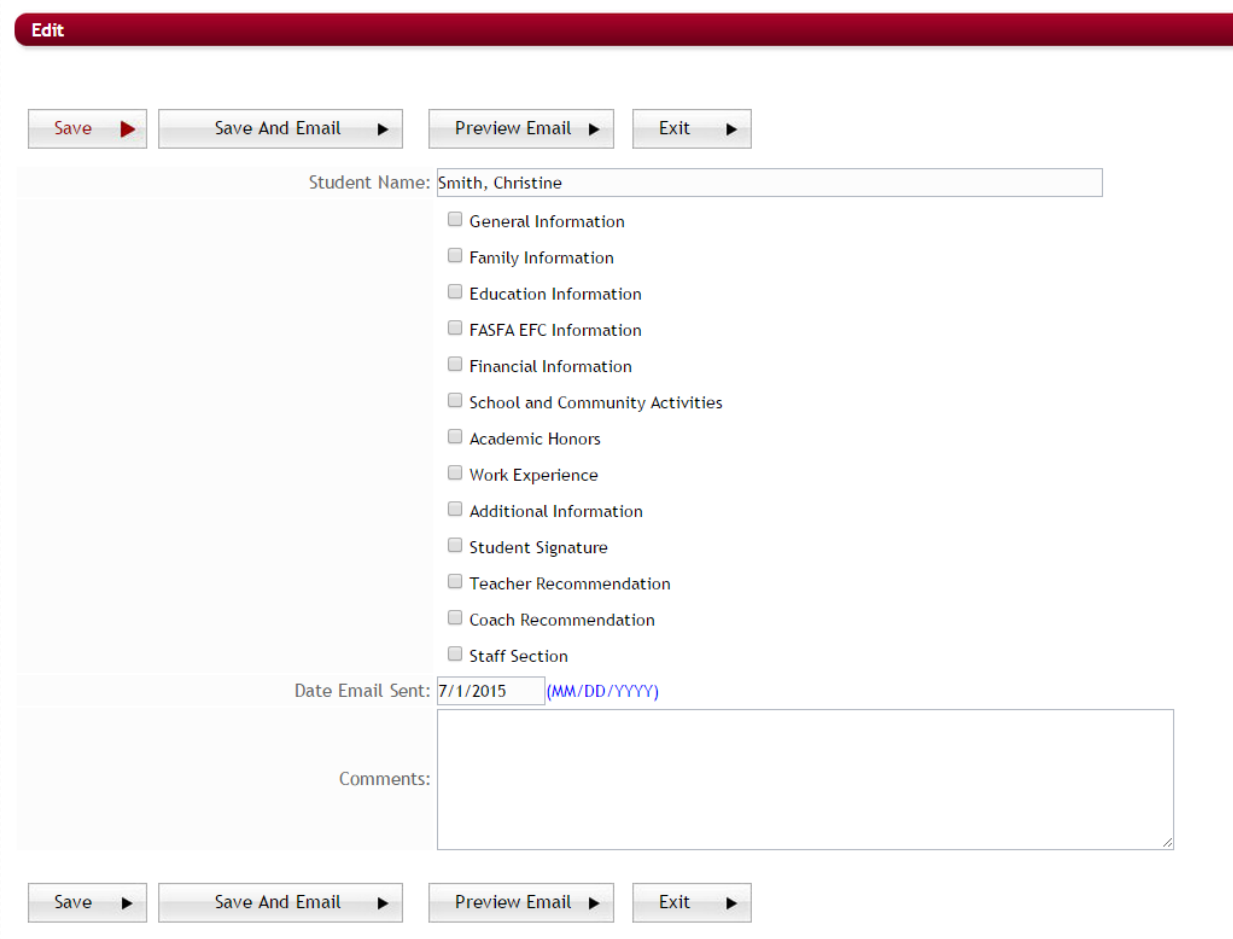
No Data Found

3.4 Releasing a Section(s) to an Applicant

- **Step 1:** Click on the **No** link under the Released column.



- **Step 2:** The following screen will open, showing all the sections in the application that can be released back to the applicant:



- **Step 3:** Place a check in the box next to the section you wish to release back to the student.

Edit

Save Save And Email Preview Email Exit

Student Name: Smith, Christine

- General Information
- Family Information
- Education Information
- FASFA EFC Information
- Financial Information
- School and Community Activities
- Academic Honors
- Work Experience
- Additional Information
- Student Signature
- Teacher Recommendation
- Coach Recommendation
- Staff Section

Deadline Date 

Deadline Date 

Date Email Sent: 7/1/2015 (MM/DD/YYYY)

Comments:


Save Save And Email Preview Email Exit


Edit

Save ▶ Save And Email ▶ Preview Email ▶ Exit ▶

Student Name: Long, Michael

Personal Information
 Personal Statement
 Education
 Involvement
 Reference Gamma Phi Beta
 Reference Community
 Review
 Financial Information

Deadline Date 

Deadline Date 

Date Email Sent: 7/1/2015 (MM/DD/YYYY)

Comments:

Save ▶ Save And Email ▶ Preview Email ▶ Exit ▶

Note: Only sections you release will be editable. All other sections the applicant filled out originally will be in a read only mode.

- **Step 4:** Once you select the section a **Deadline Date** field will appear to the right of the section. Enter a new deadline date for the applicant to complete the section by. The applicant will have until that date to change the information.
- **Step 5: Confirm the Date Email Sent:** this is the date the email will be sent to the applicant notifying them that the section was release back and that more information is required to be completed. (The email template that is sent to the applicant is the email template in your **Notification Center - Application: Additional Information Requested**. Please be sure to update this email template prior to releasing any sections back to your applicants.)
- **Step 6: Comments** – Enter a brief comment to the applicant to be included in the body of the email (Comment Field) explaining why they are receiving this email.

Save ▶ Save And Email ▶ Preview Email ▶ Exit ▶

Student Name:

General Information
 Family Information
 Education Information
 FASFA EFC Information
 Financial Information
 School and Community Activities
 Academic Honors
 Work Experience
 Additional Information
 Student Signature
 Teacher Recommendation
 Coach Recommendation
 Staff Section

Deadline Date

Deadline Date

Date Email Sent: (MM/DD/YYYY)

Comments:

Your application has incorrect data in these section please return and complete these by the deadline date.

Save ▶ Save And Email ▶ Preview Email ▶ Exit ▶

➤ **Step 5: Preview Email:** allows you to preview your email prior to sending it to the applicant.

Preview Email

Dear Christine Smith:

Additional information or clarification is needed to process your application to the Aaron C. Kesler Future Firefighters Scholarship. Please provide the following :

Your application has incorrect data in these section please return and complete these by the deadline date.

This is the message from comment field.

The information requested is located in the following section/s:

Family Information - Re-submit deadline:07/15/15
 Education Information - Re-submit deadline:07/15/15

If you have any questions about this request for additional information, please email Christine Smith at cmssrq@gmail.com.

Thank you,

CommunityForce Scholarship Application Portal

➤ **Step 6: Save and Email:** saves the information and sends the email to the applicant notifying them to complete the released section.

Save: (only use if you do not want to send an email) this will release the section(s) to the applicant and will save the information with comments, **but will not email the applicant.**

Exit: cancels the release and returns you to the Section Release report

- **Step 7:** You will receive a Confirm message showing the sections you are releasing. Click Send Mail to continue.

Confirm
280

The following section(s) is released for edit:
 Family Information - Re-submit deadline:07/15/15
 Education Information - Re-submit deadline:07/15/15

Send Email
Cancel

- **Step 8:** Once you return to the Section Release Report the applicant’s name will now appear in the bottom section of that report: **Applicants with editable Sections.** Each section that has been released will show.

Applicants with editable Sections				Number of Records: 2	Search	Export to Excel	
<input type="checkbox"/>	Applicant	Email	Blackbaud ID	Released Sections	Date Email Sent	Released	Comments
<input type="checkbox"/>	Smith, Christine	christines@communityforce.com		Education Information	07/01/2015	Yes	Comments
<input type="checkbox"/>	Smith, Christine	christines@communityforce.com		Family Information	07/01/2015	Yes	Comments

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

3.5 Viewing Released Applicants

Applicants that have sections released that are pending completion will show in the bottom section of the Section Release Report: **Applicants with editable Sections.**

Applicants with editable Sections				Number of Records: 2	Search	Export to Excel	
<input type="checkbox"/>	Applicant	Email	Blackbaud ID	Released Sections	Date Email Sent	Released	Comments
<input type="checkbox"/>	Smith, Christine	christines@communityforce.com		Education Information	07/01/2015	Yes	Comments
<input type="checkbox"/>	Smith, Christine	christines@communityforce.com		Family Information	07/01/2015	Yes	Comments

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

Applicant - click on the applicant name to look to look at the applicant dashboard

Email - is the email address that the released request was sent to.

Released Sections – this is the section(s) that have been released back to the applicant to complete.

Date Email Sent – date that the Additional Information Requested email was sent to the applicant notifying them to complete the section(s).

Released – **Yes** shows that the sections are still released.

- **Note:** an applicant must hit the submit button again in order for the release status to change back to NO and their application status back to Submitted.

Comments: any comments that were entered in the comment box by the Admin when releasing the section to the applicant.

The applicant will now show in your Evaluations>Applicant Status Report as a status of **“Additional Info Requested”**.

Score Sheet	Applicant	Email	Blackbaud ID	Submitted Date & Time	Status	Status Detail	Released	Notification Date	Comments	Requested	Received	Is Paid	Payment Date
	Smith, Christine	christines@communityforce.com		07/01/2015 18:40	Additional Info Requested		Yes	7/01/2015	Your application has incorrect data in these sections please return and complete these by the deadline date.	100%	null	No	

You can click on the **“Yes”** located under the Released column to view the sections that have been released and to resend the Section Release notification with a new deadline date.

Applicant	Email	Blackbaud ID	Released Sections	Date Email Sent	Released	Comments
Smith, Christine	christines@communityforce.com		Education Information	07/01/2015	Yes	Comments
Smith, Christine	christines@communityforce.com		Family Information	07/01/2015	Yes	Comments

You can edit a deadline, un-release an existing released section, or release a new section.

4. Searching Globally for an Applicant

If you have multiple applications live at one time, and the same applicants can apply to each, you can search an applicant to view all the applications they have applied to using the Global Search Feature.

To search globally for an applicant your Global Admin will first need to set enable the global search setting by selecting **“yes”** in the Administration>Site Settings: General Settings: Enable Global Search for Applicants.

Once the Global Admin has activated this, you will see at the top right hand corner of your dashboard header the **Search Applicants** field.

Logged in as CommunityForce Support | [Change Password](#) | [Help](#) | [Logout](#)

 Search Applicants

- **Step 1:** Enter all or part of the name of the applicant you are searching for and click the search icon.

 Christine

- **Step 2:** The **Search Results** listing will display, listing all the matches to the search name that you entered. This will show you the Applicant Name, their email, the Scholarship Name, and the Application Name for the application(s) they have applied to.



Search Results

Applicant Name	Email	Blackbaud ID	Scholarship Name	Application Name
Smith, Christine	christines@communityforce.com		Aaron C. Kesler Future Firefighters Scholarship	Testing Form applicants vwith Multi
Smith, Christine	christines@communityforce.com		Common Application Form	2015 Common Application form
Smith, Christine	christines@communityforce.com		Common Fund 1	Common Fund 1
Smith, Christine	christines@communityforce.com		Common Fund 2	Common Fund 2
Smith, Christine	christines@communityforce.com		Scholarship for organization accepting High School applicants vwith Multiple funds & Multiple Request Sections	Form for organization accepting Hi
Smith, Christine	christines@communityforce.com		Scholarship for organization vwith multiple funds accepting High School applicants	Form for organization vwith multiple
Smith, Christine	cmsrq@cf.com	1447416201	Scholarship for organization vwith one fund accepting Adult Learners	Form for organization vwith one fun
Smith, Christine	cmsrq@cf.com	1447416201	Scholarship for organization vwith one fund accepting High School applicants in Indiana	Form for organization vwith one fun
Smith, Christine	christines@communityforce.com		Z1 First Fund	Funding Source 1 application
Smith, Christine	christines@communityforce.com		Z2 Second Fund	Funding Source 2 application

Go to Page 1 Go Page 1 Of 2 Display 10 Records per Page

- **Step 3:** Select the applicant’s name listed in the Applicant Name column to see more details about all the applications that applicant has applied.
- **Step 4:** This will list all the current applications for that applicant and any award details for the application.

Current Applications:

								Export to Excel	
Academic Year	Scholarship Name	Application Name	View Application	Applicant Dashboard	Status	Sponsoring Organization	Grant Contact Email	Initial Award	Final Award
2015-2016	Aaron C. Kesler Future Firefighters Scholarship	Testing Form applicants with Multiple funds & Multiple Request Sections		Click to view Application	Submitted	My Organization Name 10 My Organization Name 6 Test My Organization Name 4 My Organization Name 3 My Organization Name 11 My Organization Name 5 My Organization Name 1 My Organization Name 7 My Organization Name 2 My Organization Name 8 My Organization Name 9	cmssrq@gmail.com		
2015-2016	Z1 First Fund	Funding Source 1 application		Click to view Application	Pending Submission	Test My Organization Name 1 My Organization Name 8 My Organization Name 10 My Organization Name 7 My Organization Name 5 My Organization Name 4 My Organization Name 3 My Organization Name 6 My Organization Name 11 My Organization Name 2 My Organization Name 9			

- **Step 5:** you can click on the View Application to view the application summary grid report, or you can click on the Click to view application to be directed to the applicant’s application dashboard.