Scholarship Management

ACES² allows users to maintain scholarship data. There are available fields that capture the distribution of scholarships over time, a process to add and update scholarship data for multiple applicants or a single applicant and a way to report on the history of scholarship transactions.

A. Adding a Scholarship manually within an individual applicant’s record

1. Log in to ACES², open an applicant’s record and then select the EVALUATION tab.
2. The Scholarships’ header displays the total amount awarded and the applicant’s commitment status to your school.
   a. The example below shows that currently the applicant neither has a scholarship nor has made a commitment to attend this law school.
3. Expand the Scholarships section.
4. Select Add.

5. The following fields are editable in the Scholarships section:
   a. Scholarship Name (set up values through UTILITIES/Fields.)
   b. Scholarship Type (set up values through UTILITIES/Fields.)
   c. Term and Year
   d. Amount
      i. This could be the total amount awarded over the course of 3 or 4 years
   e. The distribution of the award (up to 4 years)
   f. The dates the scholarship was requested, granted and/or approved
   g. Renewable indicator (a checkbox)
   h. Two UDFs (a drop-menu and a textbox)
   i. Notes field (256 characters)
6. If you award a full scholarship and want to distribute it equally over three years, enter a value in the Amount field and click the **Distribute** button. This equally divides the money over three years. The values in Year 1, 2, and 3 fields display as currency.

![Distribute button example](image)

User Tip: Always select the enrollment **Year** value when awarding scholarships that will be distributed.

![Year selection example](image)

7. If the scholarship will be distributed either over 4 years or with different amounts each year, manually enter the amount in the Year 1, Year 2, Year 3, and Year 4 fields.

![Year distribution example](image)

8. Select **Save**.
Note: Validation occurs when saving. The distribution must equal the Amount. An error message appears if there is a discrepancy.

Here are examples of errors:

This error indicates the user entered values in the Year fields but neglected to enter a value in the Amount field.

This error indicates the user entered a value in the Amount field but the values in the Year fields do not add up to the Amount value.

9. Within the Scholarships section there is a committed indicator. This displays when the Commitment Received/Deposit Paid checkbox is selected in the Status section. This is not editable in the Scholarships section.
10. The **Scholarship History** section displays any addition or update to the Scholarships section. This section also displays the ACES² user who added or modified the scholarship data. The columns in this section are sortable. In addition, they are reportable.

a. Each scholarship as a unique ID that allows the user to view all activity for that particular scholarship.

**Note:** A deleted scholarship is not displayed in the **Scholarship History** section.

**B. Managing Scholarship Information through File Manager**

Scholarship information can be added, updated and deleted through the Scholarship Management tool. Scholarship awards could be managed on either an individual applicant record or on multiple applicants through a batch. The benefit of this functionality is that there is a centralized location to manage these awards.

1. Log in to ACES²; select **FILE MANAGER/Scholarship Management**.
2. Scholarship Management contains **Grids** and **Groups**.

a. The Grid and Group has helper text that explains these two features. Hover the mouse over the corresponding icon to see the helper text provided.

b. **Grid** - similar to a Report, it contains columns of applicant-level fields

c. **Group** - similar to a Condition, is the selection criteria or filter used to limit the results. Any field could be used in the Group.

3. There are buttons to edit, add, copy and delete grids and groups.
   a. There is no limitation in the number or grids and groups a user could create.

**Please note**: Grids and Groups are developed similarly as reports. However, they cannot be configured in the Reports module. If there is an existing report or condition with the same name as the Grid or Group being created, an alert will appear. Give each Grid and Group a unique name.
4. To create a Scholarship Grid, select **Add**.
   a. The **Style** and **Subject** default to **Scholarship** and cannot be changed
   b. Enter a unique **Description**
   c. Select the **Report Type**. **User** is the default Type
   d. Use the **Field Name** search tool to locate fields for the Grid.
      i. Fields from the main Applicant table are available

5. Bring the fields into the Scholarship Grid by either double-clicking the field or selecting the > icon

6. Save the Scholarship Grid. It is now available as a menu option in the Grid.

7. To create a Scholarship Group, select **Add**.
   a. Enter a unique **Condition Name**
   b. Use the Field Name search tool to locate fields on which to filter the applicants for this group
   c. Save the Condition Profile. It is now available as a menu option in the Group.

   **Note:** the Group cannot contain an “Ask at Runtime” option in the condition.
C. The Main Page - Managing Applicant Scholarship Individually

1. Select the Grid and the Group.
2. A list of applicants appears that meet the condition specified in the Group.
3. The columns in the grid are sortable.

4. There is an export button that generates a file of the grid results.
5. The results initially display 25 records. If you would like to display all records, select the Records per Page option.

6. If you would like to apply a filter to the results, select the Filter tool.
   a. A filter can be applied to any field in the Grid
   b. Select Find
7. Select + to drill down the applicant’s row to see the Scholarship and Reviewer information.
   a. The scholarship data is editable. The review information is read only.
   b. If there is no scholarship awarded, there is a message displaying this.

8. The following tools are located lower left corner of the scholarship section:
   a. Trash can to delete a scholarship row
   b. Reload to refresh the grid
   c. Plus to add a new scholarship row
   d. Save to save the scholarship entry
   e. Cancel to discard changes

9. Select + to add a new scholarship row.
   **Note:** This section is large and has a left/right scroll bar to see all options
   a. Select a Scholarship Name
   b. If desired, enter dates requested, granted, approved
   c. Under data in UDFs, (textbox/menu option) if relevant
   d. Select the Scholarship Type
   e. Enter the scholarship amount
      i. Enter the amount. (numbers only)
      ii. There is an option to distribute the amount across several years. If the
          Distribute button is selected, the amount is equally distributed over
          three years.
      iii. If the amount needs to be distributed over four years, manually enter
           the amounts for Years 1, 2, 3 and 4.
   **Note:** There is validation when saving to make sure the distribution equals
   the amount.
f. There is a Renewable checkbox indicator that may be used

g. Select Term

h. Select Year (this is required)

i. Enter Notes, if relevant

10. Select **Save** icon to save the row.

D. Batch Update - Managing Multiple Applicants Scholarship

1. Select the Grid and the Group.

2. Select **Go to Batch Update** button.

3. A list of applicants who meet the condition specified in the Group displays.
   a. The standard fields include LSAC Account Number, Last Name, First Name, all the fields in the Scholarship section as well as the fields set up in the Grid
   b. The Grid consists of one row per scholarship per applicant
      i. Applicants with multiple scholarships will appear multiple times

**Note**: Reviewer information does not display on the Batch Update page.
4. If an export report is desired, select the applicants you want to appear in the report and then select Export.

<table>
<thead>
<tr>
<th>Exists</th>
<th>USAC Acc No</th>
<th>Name</th>
<th>Scholarship Name</th>
<th>Requested</th>
<th>Granted</th>
<th>Approved</th>
<th>UDF1</th>
<th>Type</th>
<th>Amount</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Re</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>01/14/2016</td>
<td></td>
<td>01/14/2016</td>
<td>$20,000.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No</td>
<td>02/01/2016</td>
<td></td>
<td>02/01/2016</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>03/17/2016</td>
<td></td>
<td>03/17/2016</td>
<td>$50,000.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No</td>
<td>01/14/2016</td>
<td></td>
<td>01/14/2016</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>01/14/2016</td>
<td></td>
<td>01/14/2016</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No</td>
<td>01/14/2016</td>
<td></td>
<td>01/14/2016</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>07/18/2016</td>
<td></td>
<td>07/18/2016</td>
<td>$150,000.00</td>
<td>$50,000.00</td>
<td>$50,000.00</td>
<td>$50,000.00</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No</td>
<td>02/14/2016</td>
<td></td>
<td>02/14/2016</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No</td>
<td>02/31/2016</td>
<td></td>
<td>02/31/2016</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No</td>
<td>03/13/2016</td>
<td></td>
<td>03/13/2016</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

5. The **Exists** column indicates whether or not an applicant has a scholarship.  
   a. **Yes** indicate a scholarship exists for the applicant.  
   b. **No** indicates there is no existing scholarship.

6. The results can be filtered even further by creating additional conditions within the Batch Update Page.  
   a. Conditions can be applied to the fields displayed in the results Grid.
7. The Group associated with the Grid appears and cannot be changed.
   a. Hover the mouse over the question icon to see helper text

8. Expand the Field to see the conditions for the Group. These are locked and cannot be changed on this screen

9. Select any fields, operators, and values if additional criteria is needed
   a. If more criteria is needed, select More Options

10. Specify the join that applies to all results.
    a. AND – All criteria must be met
    b. OR – Any criteria

11. Select Search button.
12. To reset a filter, select the Reset icon or Reset All button to clear all filters.

13. There are two options for scholarships managed through Batch Update:
   a. **Updating/Adding** - allows users either to update applicants with existing scholarships or to add new scholarships to applicants with no scholarship award.
   b. **Adding** – allows users to add a new scholarship
14. There is Helper text for the Scholarship options. Hover the mouse over the question icon to display.

15. Select **Updating for existing; adding for non-existing** if you wish to updating an existing scholarship that applicants already have or add a new scholarship to applicants without the award
   a. Select the applicants you wish to update
   b. Select the Scholarship Fields you wish to update
      i. Select the Distribute button if you wish to distribute the scholarship amount equally over three years
   c. Select Preview. A red asterisk * appears indicating change being made
   d. If the user wishes to reset any options, select the individual Reset icon. To clear all, select **Reset All**
   e. If you wish to generate an export report, select the **Export on Submit** checkbox.
   f. Select **Submit**
16. A confirmation window appears notifying the user how many scholarship records will be updated and how many scholarship records will be added.

17. Select **OK** to continue or select **Cancel** to return to the grid results preview.

![Confirmation Window](image)

**Always Adding New Scholarship Option**

18. Select **Always adding new** if you wish to add a new scholarship to an applicant.

**Note:** The grid results roll up into the applicant level.

- Select the applicants you wish to update
- Select the Scholarship Fields you wish to add
  - If you wish to distribute the scholarship amount equally over three years, select the Distribute button
- Select Preview. A red asterisk ★ appears indicating change being made
- If the user wishes to reset any options, select the individual Reset icon. To clear all, select **Reset All**
- Select **Submit**

![Scholarship Grid](image)
19. A confirmation window appears notifying the user how many scholarship records will be added.
20. Select OK to continue or select Cancel to return to the grid results preview.

21. If you wish to overwrite a valued field with a blank, select the applicant, select the corresponding scholarship checkbox, and choose the blank value.
22. Preview to verify.
23. Submit.

**Note:** All changes to scholarships are displayed in the Scholarship History section.
E. User Rights

1. To update an individual applicant's scholarship information, a user must have access to Applicant – Applicant.Scholarships/Modify.

2. To use the Scholarship Management tool, a user must have access to File Manager – FileManager.ScholarshipManagement.

3. To allow a user to view the scholarship information on the Daily Check page, a user must have access to the HomePage and to HomePage.DailyCheck.Scholarships.
4. Users who have access to the Daily Check Scholarship section will see the following information:
   a. Total Scholarships
      i. Total number and amount of scholarships awarded to applicants with a commitment to the school
      ii. Total number and amount of all scholarships offered
   b. Drill down to see the Scholarship Type
      i. Total number and amount of scholarships awarded to applicants with a commitment to the school
      ii. Total number and amount of all scholarships offered
   c. Drill down to see the Scholarship Name
      i. Total number and amount of scholarships awarded to applicants with a commitment to the school. The committed applicants are displayed first followed by all scholarships offered
      ii. Total number and amount of all scholarships offered
      iii. Individual applicants, the number and amount of scholarship and whether or not the applicant is committed to the school.
   d. Select an applicant to navigate directly to the Evaluation tab. The Scholarships and Scholarship History sections will be at the top of the page and expanded.