

Virginia Commonwealth University

RAMS Scholarship HUB User Guide

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RAMS Scholarship HUB Overview

The RAMS Scholarship HUB is VCU's campus-wide award management system for VCU scholarships. The HUB offers many useful online features and benefits for students as well as for faculty and staff involved in the scholarship awarding process. Students can view available scholarships, apply for scholarships, and view and accept scholarship offers. Faculty and staff can view applicants eligible for specific scholarships, review and score applications, select recipients and offer scholarships.

Gaining access to the RAMS Scholarship HUB

- Students have access to the RAMS Scholarship HUB after they register for classes for the first time. They can log in at vcu.academicworks.com to begin the application process.

VCU Make it real.

Sign In

Opportunities Donors

Our Opportunities

Show Filters

Welcome to the RAMS Scholarship HUB!

Enrolled Students

- We invite you to discover and apply for scholarship opportunities by logging in (click the 'Sign In' button at the top right) with your VCU eID and password.
- Once you have logged in, review your personalized recommendations by navigating to your "Recommended Opportunities" page.

Search from Here

- Search for scholarship opportunities offered by VCU Schools and Colleges by clicking the "Show Filters" button above.
- Use the "Search by Keyword" to find scholarships by name, specific criteria, or other keyword descriptions.

Questions?

- For scholarship questions, contact us at scholarships@vcu.edu
- Learn more about VCU [HERE](#)

Search by Keyword

Award	Name	Actions
Varies	Judy VanSlyke Turk Endowed Scholarship The Judy VanSlyke Turk Scholarship was established with gifts from colleagues and friends in honor of Dr. Turk's service as director of the School...	Deadline 06/30/2020

- Faculty and staff can gain access by submitting a ticket through the VCU IT Support ticket system. They only have to submit a ticket once.

New users can include opportunity administrators, system administrators and new review committee members.

- The Office of Financial Aid will review new requests and grant-appropriate level of access.

****NOTE:** Faculty and staff members who request access to the RAMS Scholarship HUB **MUST** confirm they have completed training for VCU FERPA (Family Educational Rights and Privacy Act), available through Records and Registration. Members will not be granted access until this training has been completed. [Access the training.](#)

Administrator roles

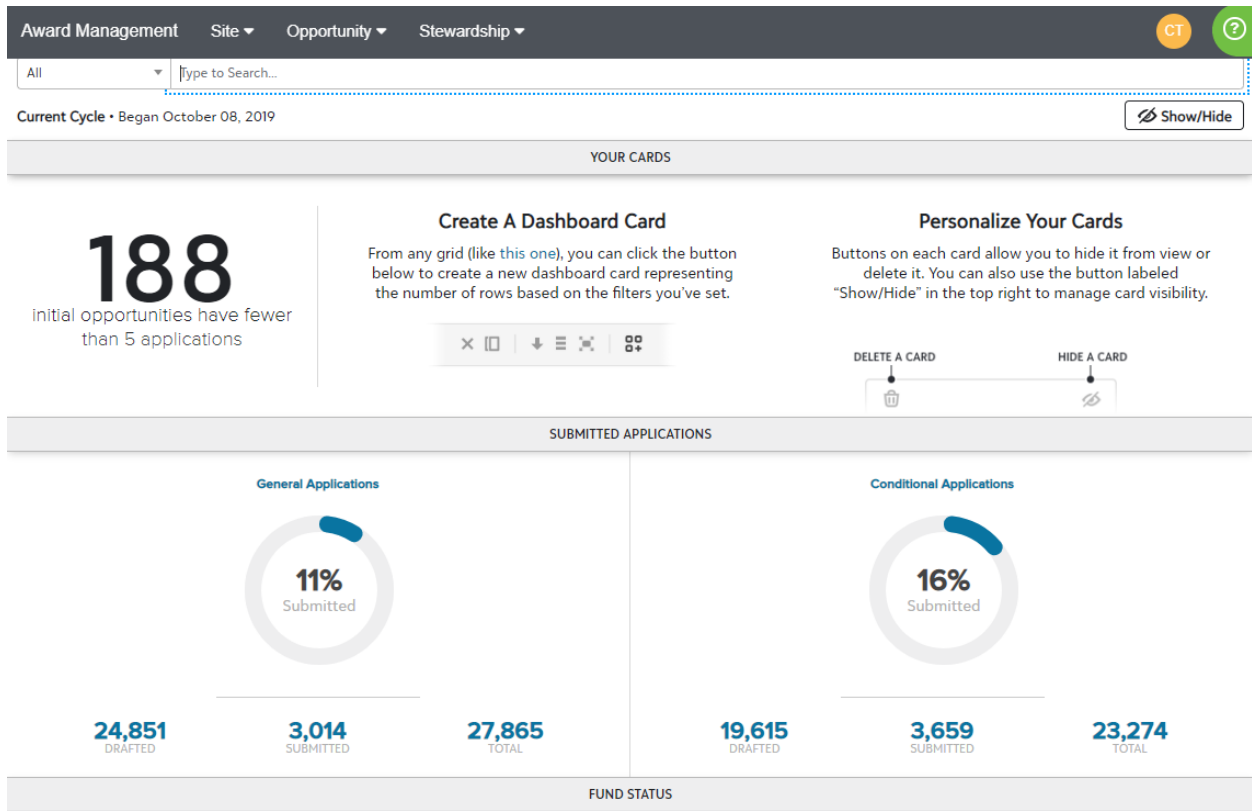
An administrator role allows a user to access the administrator portal of the system. There are different levels of access based on the role type.

- System administrator
 - Has full access to everything in the system.
 - Can make updates to system settings and edit opportunities/portfolios for any scope.
 - Can make updates to the General Application and email templates.
- Opportunity administrator
 - Is often a scholarship administrator within a department or unit.
 - Has limited access to the system, based on assigned scopes.
 - Can view and process applications to all opportunities within their scopes.
 - Can make award offers to students and run reports on applicants, applications, award disbursements and reviewer groups (including scores and notes).
- Department administrator
 - Can view opportunities and move applicants into various categories to be awarded.
 - Can access the fund disbursements and post-acceptance applications grids.
 - Can create review groups and assign reviews.
- Stewardship system administrator
 - Has full access to Stewardship Management.
 - Has limited access to Award Management.
 - Can create and edit other stewardship administrators.
- Act – stewardship administrator
 - Can do most tasks within Stewardship Management on scoped items.
 - Has no access to Award Management.
- View – stewardship administrator
 - Can see scoped items within Stewardship Management.
 - Has no access to Award Management.

Portal and dashboard

When an administrator logs on to the RAMS Scholarship HUB, the first thing that appears is the dashboard.

- The dashboard displays a real-time picture of the status of current opportunities and applications. Information displayed on the dashboard is specific to the particular scope(s) the opportunity administrator can access.



Custom dashboard cards

- Administrators can create their own custom dashboard cards so they can display the information they find most useful. Once a custom card is created on the dashboard, it serves as a shortcut to grid views.
 - The custom dashboard cards allow the administrator to add, delete and rearrange information on the grid in any way they prefer.

Award Management Site Opportunity Stewardship CT ?

All [Type to Search...]

Current Cycle • Began October 08, 2019 Show/Hide

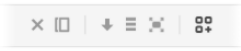
YOUR CARDS

188

initial opportunities have fewer than 5 applications


Create A Dashboard Card

From any grid (like [this one](#)), you can click the button below to create a new dashboard card representing the number of rows based on the filters you've set.



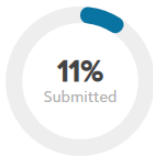
Personalize Your Cards

Buttons on each card allow you to hide it from view or delete it. You can also use the button labeled "Show/Hide" in the top right to manage card visibility.



SUBMITTED APPLICATIONS

General Applications



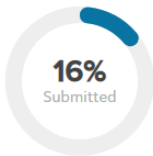
11%
Submitted

24,851
DRAFTED

3,014
SUBMITTED

27,865
TOTAL

Conditional Applications



16%
Submitted

19,615
DRAFTED

3,659
SUBMITTED

23,274
TOTAL

FUND STATUS

- The dashboard card above, for example, will take the user to a grid view of the General Applications that have been submitted or the Conditional Applications that have been submitted.
- A custom dashboard card can be created from any grid. Once a grid has been filtered and adjusted to the desired view, click on the Create a New Dashboard Card icon. This saves the card to the dashboard.

Oppo Create a new dashboard card from the current grid state (6 cards remaining)

✓ ✕ ☆ □ ↓ ≡ ↔ ☰

▼ Current Auto-Match 1-50 of 376 Page 1

View	Id	Type	Name	Description	Start At	End At	Begin Re...	End Revi...	Archived?	Archive At	Cr
		Auto-Match							No		

Scopes

A scope is a label used in RAMS Scholarship HUB to indicate the department/unit that is responsible for an opportunity.

- Opportunity Administrators must have scopes added to their accounts to access information associated with that particular scope.
 - The appropriate scopes will be added to an Opportunity Administrator by the Office of Financial Aid and Scholarships upon making them a user in the system.

Scholarship applications and student information

- The General Application is a brief, universitywide set of broad questions to gather basic information about applicants. The General Application is the first step that applicants must complete before being matched to opportunities.
 - For FERPA compliance, every applicant must agree to the following statement before they submit a General Application:
“By submitting this application, I certify I am the person for whom this application is being submitted and that the information I have provided on this online application is true and accurate to the best of my knowledge. Further, I give the VCU Office of Student Financial Services permission to release information regarding my academic and/or financial status to any appropriate scholarship committees.”
- The Conditional Application is an application created by a department/unit that has more detailed questions geared toward specific scholarships in the department/unit.
- “Imported data” is data loaded for each applicant from Banner. Banner information is updated in the HUB every evening. It includes the following personal, demographic and educational information:
 - VCU ID
 - Email
 - Name
 - Date of birth
 - Gender
 - Address (city, state, zip code and county code)
 - Telephone number
 - Enrollment status
 - Cumulative GPA and credits
 - Classification
 - College and major
 - Race/ethnicity
 - Citizenship
 - Level (undergraduate, graduate or professional)
 - High school GPA
 - ACT and SAT scores
 - eID
 - Account balance
 - FAFSA on file (current academic year and next academic year)
 - Need rating (current academic year and next academic year)
 - High school attended
 - Residency
 - SAP status - Satisfactory Academic Progress

General Application stage

- The applicant completes the General Application.
- The applicant's responses are paired with data imported from Banner.

Conditional Application stage



- RAMS Scholarship HUB will compare the completed General Application and imported data against the criteria for all available Conditional Applications.
- If the applicant meets the criteria of the Conditional Application, they can complete the Conditional Application to be considered for opportunities associated with that Conditional Application.
 - Department/units have created Conditional Applications based on their scholarship criteria.
 - Once a student submits a General Application, the Conditional Application based on their program of study becomes available.

Opportunity types


- Auto-Match: Students are automatically matched to opportunities based on information submitted on the General Application and any Conditional Application that has been completed.
 - If the student meets the minimum criteria for an auto-match opportunity, an application for that opportunity is automatically generated and submitted to the applicant pool. The student does not have to submit anything else to be considered for this opportunity.
- Apply-To: The student receives a list of recommended Opportunities based on the information submitted from the General Application.
 - Apply-To Opportunities have additional requirements — typically an essay or additional questions, called Supplemental Questions — that the student must complete.
 - An application to an Apply-To Opportunity is submitted once the student completes all of the required Supplemental Questions unique to the specific scholarship.




Opportunity-Specific Information


Description

B *I*   Help Preview Edit

The Dabney and Joseph Cortina Scholarship will be awarded to rising undergraduate juniors or seniors pursuing a degree within the VCU Robertson School with a grade point average of 3.0 or above and demonstrated need. Preference will be given to students who identify as first generation college students.

Example Formatting: ***bold***, *_italics_* Full Screen 

Type Auto-Match  Apply-To  

Source  College of Humanities and Sciences Application

Portfolio vs. Opportunity

The RAMS Scholarship HUB organizes large amounts of digital information in two key sections: Opportunities and Portfolios. The Portfolio contains general information about the scholarship. The Opportunity contains the basic materials for the application process.

- Portfolios bundle related opportunities under a single header. The Portfolio is created first; opportunities are created within the Portfolio to collect applications and make awards. Portfolios contain information about scholarship opportunities that do not change from year to year, such as:
 - Name
 - GUID (unique identifier code extracted from RADAR)
 - Scopes
 - Renewal information

The screenshot displays the 'Dabney and Joseph Cortina Scholarship' portfolio page. At the top, there are navigation tabs: 'Details' (selected), 'Opportunities', 'Renewal Applications', and 'Encumbered Applications'. Below the tabs, the portfolio name 'Dabney and Joseph Cortina Scholarship' is shown with a 'Notes (1)' and 'History' button. The 'Basic Information' section contains the following fields:

- Name:** Dabney and Joseph Cortina Scholarship
- Fund Code:** 70b4481f-08ec-428a-8ab1-7bfe2a49da49
- Auxiliary Fund Code:** (empty)
- Project ID:** (empty)
- Donors:** Add Donors (dropdown)
- Scopes:** Add Scopes (dropdown) with selected scopes: VCU Foundation, College of Humanities and Sciences, Robertson School of Media & Culture.
- Visibility:** Always Visible (selected), Visible When Open, Always Hidden.


The 'Fund Information' section at the bottom shows the GUID Fund Code: 70b4481f-08ec-428a-8ab1-7bfe2a49da49 and an 'Update Portfolio' button.

- Opportunities are the scholarships to which the applicant applies in RAMS Scholarship HUB. The opportunity contains information for a specific period, such as:
 - Details: Start and end dates, reviewing dates
 - Questions: Supplemental questions specific to the opportunity
 - Qualifications
 - Applications

- Post-acceptance

To view active opportunities in a portfolio, click on the Active Opportunities drop-down and select the opportunity.

Details
Questions
Qualifications
Applications
Communications
▼ Reviews
▼ Post-Acceptance



Dabney and Joseph Cortina Scholarship
▼ Fall 2019 | Ended 110 days ago

Notes
History

Basic Information

Name Dabney and Joseph Cortina Scholarship

Fund Code 70b4481f-08ec-428a-8ab1-7bfe2a49da49

Auxiliary Fund Code None Given
For accounting purposes, et al.

Project ID None Given

Donor None Given

Scopes College of Humanities and Sciences, Robertson School of Media & Culture, VCU Foundation

Visibility Always Visible

Fund Information
Information directly published from Stewardship Management.


GUID Fund Code 70b4481f-08ec-428a-8ab1-7bfe2a49da49

Foundation Account # 0-63318


Update Opportunity

When cycle management occurs, opportunities from the previous year will be archived, but the information will remain accessible in the portfolio details. To view all opportunities in a portfolio, click on the Opportunities tab.

Details
Opportunities
Renewal Applications
Encumbered Applications



Dabney and Joseph Cortina Scholarship
▼ Active Opportunities



Notes (1)
History

Applicant

Season	Start Date	End Date	Archive Date	Applications
Winter 2017	12/15/2017	03/02/2018	11/15/2018	9
Fall 2019	11/01/2019	02/29/2020	-	7
Future	-	03/15/2019	10/08/2019	0

New scholarships

When a new scholarship is established, the department must notify the Office of Donor Relations and Events (DRE) and the Office of Financial Aid and Scholarships. To do so, they must complete a shared Google Form to set up the funds in RADAR (CRM database used by the Office of Development and Alumni Relations) and to create a new Financial Aid Fund Code for awarding. Once the form is submitted, the scholarship opportunity can be added to the RAMS Scholarship HUB by DRE.

Create a new portfolio **this step is to be completed by the Systems Administrator only*

Create a New Portfolio

Portfolio Information

Name

Fund Code

Auxiliary Fund Code
For accounting purposes, et al.

Project ID

Donors

Scopes

Visibility Always Visible Visible When Open Always Hidden

1. Go to Opportunity > Portfolios > Create New.
2. Enter the portfolio information (information that applies to all opportunities in this portfolio):
 - a. Opportunity name: Visible to applicants and reviewers
 - b. Fund code: RADAR GUID (appears in both Fund Code and GUID fields)
 - c. Donors: Can link an associated donor profile page.
 - d. Scopes: Control which opportunity administrators can access this portfolio — typically, the foundation and school associated with the opportunity.
Example: VCU Foundation, School of Social Work
 - e. Foundation account number
 - f. Money source: Permanently or Temporarily Restricted
 - g. Financial aid fund code
 - h. Banner Index: If known or provided by the department
 - i. Fund description (according to information provided by the opportunity administrator and cross-referenced with the gift agreement to ensure donor intent is followed)
 - j. Type: Auto-match, apply-to, external

- k. Application source: The school's Conditional Application, if needed beyond the general application for the particular scholarship
- l. Post-acceptance questions for permanently restricted funds (might also be applied to donor-funded temporarily restricted funds)

Create a new opportunity

After the Systems Administrator in DRE enters the fund as a portfolio, the department/unit is notified. The department must verify the information listed in the previous section has been entered correctly **AND** add other information to open a new opportunity, such as:

1. Visibility
 - a. Always Visible: A listing is always available, even if all opportunities for the portfolio have been archived.
 - b. Visible When Open: A listing is available only if an opportunity is currently published and accepting applications.
 - c. Always Hidden: A listing is never available, even if the opportunity is currently Published and accepting applications.
2. Additional scopes (if applicable)
3. Opportunity dates: Start date, end date(s), review date(s), etc.
4. Award Details: Amount, quantity, visible award amount (applicants can see)
5. Communications language for In-System Offer and Post-Acceptance Email: Language may vary by school.

Once the new award has been entered in the RAMS Scholarship HUB, the department is notified. The opportunity administrator can view the opportunity and add information such as additional scopes, qualifications, award details, etc.

Supplemental questions for opportunities

In addition to information provided by the student import and the General/Conditional Applications, apply-to opportunities have supplemental questions that applicants should answer when applying for the scholarship. This could include more detailed questions related to the opportunity or requirements, such as letters of recommendation or an essay. The questions/requirements are listed under the Questions tab within the opportunity. For donor-funded scholarships, the questions must comply with donor intent.

The screenshot shows the 'Award Management' interface. At the top, there are navigation tabs: 'Award Management', 'Site', 'Opportunity', and 'Stewardship'. On the right, there are 'CT' and '?' icons. Below the navigation, there are tabs for 'Details', 'Questions', 'Qualifications', 'Applications', 'Communications', 'Reviews', and 'Post-Acceptance'. The 'Questions' tab is selected. The main content area shows the 'Chandra Broadnax-Payne Scholarship' with a dropdown for 'Fall 2019' and 'Ended 100 days ago'. There are 'Notes' and 'History' buttons. Below this, there are tabs for 'Applicant', 'Administrator', and 'Reviewable'. A table lists the supplemental questions with columns for 'Text', 'Field', 'Required', 'Reviewable', and 'Type'.

Text	Field	Required	Reviewable	Type
Applicant must demonstrate that they actively participate in the community and submit an essay of at least 250 words addressing the question 'What does it mean to be passionate?'	1097	Yes	Yes	Essay
What are you passionate about, and how are you following that passion?	1098	Yes	Yes	Essay
Provide a 50-100 word statement about why you are qualified to receive this scholarship.	1104	Yes	Yes	Essay
Provide a resume including jobs, achievements, off-campus activities, etc.	1114	Yes	Yes	File Upload
Provide up to six writing or other samples of your work (published stories, advertisements, public service announcements, press releases, demo tapes, etc.).	1118	Yes	Yes	File Upload

Supplemental question formats

- Choose one: Applicant can only choose one correct response.
 - Radio buttons
 - Single-select list
- Choose multiple: Applicant can choose several responses.
 - Checkboxes
 - Multiselect List
- Open-ended: Applicant can type their own response.

- Short answer
 - Number
 - Date
 - Phone number
 - URL
 - Essay
- File: Applicant can upload a document.
 - File upload
 - Embed URL
- Reference request: Used for letters of recommendation.
 - Name and email address

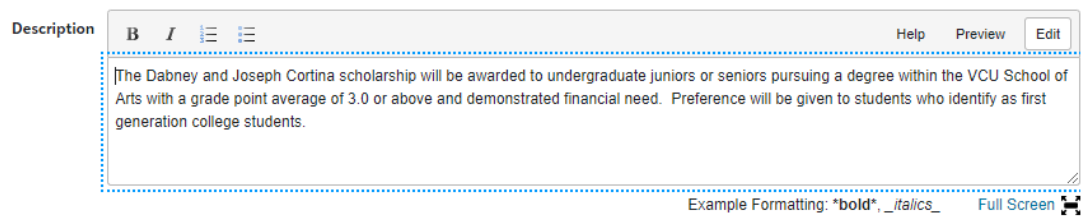
Adding supplemental questions to an apply-to opportunity

1. Go to Opportunity > Portfolios > All and select the opportunity.
 - a. Select the Details tab to ensure the opportunity is set as an Apply-to Opportunity.
2. Click the Questions tab. By default, it will be on the Applicant tab.
3. Click Add Applicant Question.
4. Type the question being added or choose an Existing Applicant Question from the list.
5. Choose Single Question or Question Set.
6. If Single Question is selected, choose the Question Type and add answer choices as appropriate.
7. Click Save Question.

Qualifications for opportunities

Qualifications are the criteria that an applicant must meet to be eligible for an opportunity. Qualifications use information from the Banner import, General Application, Conditional Application, and supplemental questions to match potentially qualified applicants to opportunities. The process is used to narrow the field of applicants to the most qualified applicants. The qualifications are based on the scholarship criteria. The scholarship criteria can be found in the description under the Details tab of the opportunity.

Opportunity-Specific Information



The screenshot shows a rich text editor interface. On the left, the word "Description" is visible. The editor's toolbar includes icons for bold (B), italic (I), bulleted list, and numbered list. On the right side of the toolbar, there are buttons for "Help", "Preview", and "Edit". The main text area contains the following text: "The Dabney and Joseph Cortina scholarship will be awarded to undergraduate juniors or seniors pursuing a degree within the VCU School of Arts with a grade point average of 3.0 or above and demonstrated financial need. Preference will be given to students who identify as first generation college students." At the bottom right of the editor, there is a text label "Example Formatting: *bold*, _italics_" and a "Full Screen" button with a maximize icon.

The qualifications are added to the Qualifications tab under the opportunity. For the RAMS Scholarship HUB to determine if applications are qualified or unqualified, the opportunity must have at least one qualification group.

Award Management Site Opportunity Stewardship CT ?

Details Questions Qualifications Applications Communications Reviews Post-Acceptance

Dabney and Joseph Cortina Scholarship in the Arts Notes History
 ▼ Summer 2021 | Starts in 416 days

'Classification' must include Junior or Senior.
 'College Combined' must include AR.
 'Cumulative GPA' must be greater than or equal to 3.0.
 'Current Year FAFSA' must include Y.
 'Enrollment (Time Status)' must include Full Time.
 'First Generation' must include FIRSTGEN.

Choose a question to qualify on. ▼

20 conditional application matches based on this group [Duplicate Group](#) [Delete Group](#)

OR

'Classification' must include Junior or Senior.
 'College Combined' must include AR.
 'Cumulative GPA' must be greater than or equal to 3.0.
 'Current Year FAFSA' must include Y.
 'Enrollment (Time Status)' must include Full Time.

Choose a question to qualify on. ▼

126 conditional application matches based on this group [Duplicate Group](#) [Delete Group](#)

[Add Another Group](#)

126 conditional application matches based on all groups [Update Qualifications](#)

Qualification logic

Rule No. 1: All qualification criteria within a single qualification group must all be true *at the same time* for an applicant to be considered qualified.

Dabney and Joseph Cortina Scholarship in the Arts Notes History
 ▼ Summer 2021 | Starts in 416 days

'Classification' must include Junior or Senior.
 'College Combined' must include AR.
 'Cumulative GPA' must be greater than or equal to 3.0.
 'Current Year FAFSA' must include Y.
 'Enrollment (Time Status)' must include Full Time.
 'First Generation' must include FIRSTGEN.

Choose a question to qualify on. ▼

20 conditional application matches based on this group [Duplicate Group](#) [Delete Group](#)

In the example above, a qualified student must be a junior or senior in the School of the Arts, have a cumulative GPA of 3.0 or higher, must have a FAFSA on file, be registered full time and must be a first-generation college student.

Rule No. 2: More than one kind of applicant can be considered qualified by using “or” statements.

In the above example, both juniors and seniors would be considered qualified for this opportunity.

Rule No. 3: All qualifications are read simultaneously. The order of qualifications or qualification groups does not make any difference.

The screenshot shows the 'Dabney and Joseph Cortina Scholarship in the Arts' interface. At the top, it says 'Summer 2021 | Starts in 416 days' and has 'Notes' and 'History' buttons. Below this, there are two qualification groups separated by an 'OR' statement. Each group contains a set of criteria: 'Classification' must include Junior or Senior, 'College Combined' must include AR, 'Cumulative GPA' must be greater than or equal to 3.0, 'Current Year FAFSA' must include Y, 'Enrollment (Time Status)' must include Full Time, and 'First Generation' must include FIRSTGEN. The first group has 20 conditional application matches, and the second group has 126 conditional application matches. Each group also has 'Duplicate Group' and 'Delete Group' options.

In this example, even though first-generation college students are listed in the first qualification group, that alone does not indicate they receive preference. Both groups are given equal consideration.

The scholarship description noted that preference is given to first-generation college students; this is why the qualifications in group 1 and the qualifications in group 2 are the same, except for the first-generation college student requirement in group 1. The student could still be qualified for this scholarship if they are not a first-generation college student because they would match to qualification group 2.

Rule No. 4: Qualification groups are read independently of one another.

While all criteria within a single qualification group must be true at the same time to qualify an applicant, each qualification group is read independently. Information contained in one group has no impact or interaction with any other qualification group.

Rule No. 5: Short-answer questions answered by the applicant do not work well as qualification criteria.

Adding qualifications to an opportunity

1. On an opportunity, click on the Qualifications tab.
2. Create a qualification group.
 - a. Choose a question for qualification.
 - b. Based on the question, choose a condition (e.g., must contain, must include, must be greater than).

- c. Choose a value.
 - d. Select Add.
 - e. Repeat until all qualifications have been added. If an applicant meets all qualifications, the applicant will receive one (1) qualification point.
3. Select Update Qualifications.

References/Letters of recommendation

Many opportunities require that applicants provide personal or professional references with their applications. A reference or letter of recommendation request can be added to the supplemental questions on an apply-to opportunity.

					Applicant	Administrator	Reviewable
Text	Field	Required	Reviewable	Type			
Do you plan to be enrolled as a full-time student (12 or more credit hours) for both the fall and spring semesters of the 2020-21 academic year?	1366	Yes	Yes	Radio Buttons			
Submit an essay of about 500 words describing experiences, personal interests, and career and study objectives.	1362	Yes	Yes	File Upload			
Please provide the name and email address of a VCU faculty member to write a letter of reference on your behalf. (Please note: It is the applicant's responsibility to see that your reference submits their letter by the deadline. Applications with missing references will be disqualified and will not be considered.)	1364	Yes	Yes	Name and Email Address			
Please provide the name and email address of a second VCU faculty member to write a letter of reference on your behalf.	1365	Yes	Yes	Name and Email Address			

- When an applicant provides a name and email address of a reference, the RAMS Scholarship HUB automatically sends an email to that address informing the recipient of the request.
- The email will contain the link for the reference recipient to follow. There is a separate log-in tab for References and Reviewers.

Opportunities

Applicants and Administrators
References and Reviewers

Welcome!

Welcome back! In order to access your account to serve as a reference or reviewer, please sign in using your email address and the password you set when you created your account. If you need to recover your password, please click on [trouble signing in](#).

Email Address

Password

[Trouble signing in?](#)

- The reference can provide a letter directly into the RAMS Scholarship HUB. The letter can be an upload or typed in simple-text format.

Renewable scholarships

Students can receive renewable scholarships over multiple years. Renewable scholarships typically have specific requirements to continue receiving the award. There can be two different sets of requirements associated with the award:

1. Requirements to qualify for the **initial scholarship offer**. Examples of initial qualifications:
 - GPA (high school or current)
 - Prior achievements or essay
2. Requirements to **maintain the scholarship** over the duration of the scholarship. Examples of renewal qualifications:
 - Maintaining a specified minimum GPA
 - Continuing with a specific major
 - Earning a specified number of credits

The RAMS Scholarship HUB allows the user to set up a portfolio as renewable and to set renewable qualifications that differ from the initial scholarship qualifications. It is the responsibility of the Opportunity Administrator to ensure that the recipient maintains the requirements in order to maintain the scholarship.

Renewable portfolio setup

1. Create a new portfolio.
2. On the portfolio record, go to the Details tab.
3. Under Renewal Settings, enter the following information:

Renewal Settings

Award Iterations

Disbursement Periods

<input type="text" value="05/20"/>	<input type="text" value="End Date (MM/DD)"/>	<input type="checkbox"/> Selective Renewals?
<input type="text" value="12/20"/>	<input type="text" value="End Date (MM/DD)"/>	<input type="checkbox"/> Selective Renewals?
<input type="text" value="Start Date (MM/DD)"/>	<input type="text" value="End Date (MM/DD)"/>	<input type="checkbox"/> Selective Renewals?

[Add Another](#)

Anticipated Total Amount
The total amount an applicant can expect to receive over the course of this scholarship.

Anticipated Total Amount Applicant Visible?
Check this box to surface the anticipated total amount to applicants.

Financial Information

Summary information for all non-archived initial and renewable opportunities in this portfolio.

AY 20-21	Fund Period Amount	\$1,105.00	Fund Period Awards	0
Winter 2020 Automatch	Committed Amount	(\$0.00)	Committed Awards	(0)
	Total Remaining Amount	\$1,105.00	Total Remaining Awards	0
Spring 2020 Renewal	Opportunity Amount	\$0.00	Opportunity Awards	0
	Committed Amount	(\$0.00)	Committed Awards	(0)

[Update Portfolio](#)

- a. Award iterations: Sets the total number of award renewals included in the award.
 - i. The award iterations include the initial opportunity award plus the number of times the renewal qualifications will be checked.
 - ii. Example 1: A freshman award, renewed once per year, lasting four years would have four (4) award iterations.
 - iii. Example 2: A four-year award, reviewed every semester, would have eight (8) award iterations.
- b. Disbursement periods: Sets the date for each renewal opportunity.
 - i. Start date: When the renewal applications will be generated.
 1. When the renewal start date arrives for a renewable portfolio, the system will automatically generate a new renewal opportunity in the portfolio.
 2. This renewal opportunity will contain automatically generated renewal applications for any applicant eligible for renewal.
 - ii. End date: Provides deadline for applicant responses. *Only necessary if collecting additional information from recipients.*
- c. Anticipated total amount: Specifies the dollar amount an applicant can expect to receive over the full duration of an award (as long as the applicant stays in compliance)
- d. Anticipated total amount applicant visible: This determines whether to show this amount to applicants.

4. Select Update Portfolio.

Update criteria for future renewal opportunities

1. On the renewable portfolio, select Opportunities.

Details **Opportunities** Renewal Applications Encumbered Applications

Dr. Wally Memorial Scholarship
▼ Active Opportunities

Notes History

Basic Information
Any changes you make below will affect all of the opportunities in this portfolio.

Name: Dr. Wally Memorial Scholarship

Fund Code: e1583a52-0409-4533-ac0f-ef077056859a

Auxiliary Fund Code:

Project ID:

Donors: ▼ Add Donors

Scopes: ▼ Add Scopes SOB Foundation School of Business Business - Dean's Office

Visibility: Always Visible Visible When Open Always Hidden

2. Under Renewal, select Future.

Details Opportunities **Renewal Applications** Encumbered Applications

Dr. Wally Memorial Scholarship
▼ Active Opportunities

Notes History

Applicant

Season	Start Date	End Date	Archive Date	Applications
Winter 2020	02/17/2020	03/17/2020	-	0

Renewal

Disbursement Period	Archive Date	Applications
Future	-	-
Spring 2020 Renewal	-	0
Winter 2020 Renewal	-	-

3. Update the following information:
 - a. Source: The information you need to evaluate applicant compliance.
 - i. Imported: Only uses imported records. Does not require applicant interaction.

- ii. Imported and General Application: Uses imported records and fields from the General Application. Requires submitted General Application.
 - iii. Imported and Supplemental: Uses imported records and supplemental questions. Requires applicants to submit additional application to renewal opportunity (but not the General Application).
 - 1. To add supplemental renewal questions, click on the Questions tab.
 - iv. Imported, General Application and Supplemental: Uses imported records, fields from the General Application and supplemental questions. Requires applicants to submit General Application and additional application to renewal opportunity.
 - v. None: Does not require additional information (but does require admin action to distribute award).
- b. Award Information: Fill out as you would any other opportunity.
4. Select Update Opportunity.
 5. If an opportunity has specific renewal qualification criteria, click on the Qualifications tab and set up qualifications to check applicant compliance with the terms of the renewable award.

Details
Qualifications

Dr. Wally Memorial Scholarship

▼ Future Renewal Opportunities

Portfolio Information

Name [Dr. Wally Memorial Scholarship](#)

Fund Code e1583a52-0409-4533-ac0f-ef077056859a

Auxiliary Fund Code
For accounting purposes, et al.

Project ID None Given

Donor None Given


Scopes Business - Dean's Office, School of Business, SOB Foundation

Visibility Always Hidden

Applications

An opportunity administrator can review all of the current applications for a specific opportunity under the Applications tab of the opportunity. The grid provides the applicants' imported information, General Application information, Conditional Application information, and opportunity-specific supplemental questions.

[Details](#) [Questions](#) [Qualifications](#) **Applications** [Reviews](#) [Communications](#) [Post-Acceptance](#)

 **General Scholarship** [Notes](#) [History](#)
 ▼ Fall 2017 | Published, Ends in 134 days

Begin typing to search by name, email address, or user ID...

▼ Shareable View - Default 1.50 of 74 Page 1										
	View	Category	Categori...	Award Period	Amount Offered	Qualification Points	ACT Compos...	High School ...	City	State
<input type="checkbox"/>	View	Submitted	09/01/2016		\$0.00	1	23.0	4.0	Pensacola	FL
<input type="checkbox"/>	View	Submitted	09/01/2016		\$0.00	1			Fairhope	AL
<input type="checkbox"/>	View	Submitted	09/04/2016		\$0.00	1	30.0	4.0	Mobile	AL
<input type="checkbox"/>	View	Submitted	09/06/2016		\$0.00	1			Navarre	FL
<input type="checkbox"/>	View	Submitted	09/06/2016		\$0.00	1	23.0	4.0	Mobile	AL
<input type="checkbox"/>	View	Submitted	09/06/2016		\$0.00	1	24.0	3.59	Monroeville	AL
<input type="checkbox"/>	View	Submitted	09/06/2016		\$0.00	1	26.0	4.0	Mobile	AL
<input type="checkbox"/>	View	Submitted	09/06/2016		\$0.00	1	26.0	3.8	Hoover	AL
<input type="checkbox"/>	View	Submitted	09/06/2016		\$0.00	1	22.0	2.97	Mobile	AL
<input type="checkbox"/>	View	Submitted	09/06/2016		\$0.00	1	25.0	4.0	Saraland	AL
<input type="checkbox"/>	View	Submitted	09/06/2016		\$0.00	1	25.0	3.43	Semmes	AL
<input type="checkbox"/>	View	Submitted	09/07/2016		\$0.00	1		3.63	Gettysburg	PA
<input type="checkbox"/>	View	Submitted	09/07/2016		\$0.00	1	24.0	3.53	Mobile	AL
<input type="checkbox"/>	View	Submitted	09/08/2016		\$0.00	1	26.0	3.9	Gulfport	MS

View: A specific applicant's information from all sources can be reviewed by clicking on View in the View column.

Category: This column provides the administrator with each applicant's current opportunity-specific application status.

Qualification points: Each applicant's qualification points are listed in the Qualification Points column.

Qualification points

An applicant's qualification points are calculated automatically based on the qualification groups. If an applicant matches all of the criteria in a qualification group, the system will generate one (1) point for the applicant.

Dabney and Joseph Cortina Scholarship in the Arts
Summer 2021 | Starts in 416 days

Notes History

'Classification' must include Junior or Senior. 'College Combined' must include AR. 'Cumulative GPA' must be greater than or equal to 3.0. 'Current Year FAFSA' must include Y.
'Enrollment (Time Status)' must include Full Time. 'First Generation' must include FIRSTGEN.

Choose a question to qualify on.

20 conditional application matches based on this group Duplicate Group Delete Group

OR

'Classification' must include Junior or Senior. 'College Combined' must include AR. 'Cumulative GPA' must be greater than or equal to 3.0. 'Current Year FAFSA' must include Y.
'Enrollment (Time Status)' must include Full Time.

Choose a question to qualify on.

126 conditional application matches based on this group Duplicate Group Delete Group

In this example:

- The student would receive 0 qualification points if they do not match all the criteria in group 1 or group 2.
- The student would receive 1 qualification point if they match all of the criteria in group 1 **OR** group 2, but not in both.
- The student would receive 2 qualification points if they meet all of the criteria in group 1 **AND** group 2.

The scholarship in the above example gives preference to first-generation college students. The students who meet all of the qualifications **AND** are first-generation college students would be given 2 qualification points, whereas students that are qualified but are **NOT** first-generation college students would only receive 1 qualification point.

Locating renewal applications

Whenever a renewal start date arrives for a renewable portfolio, the system will automatically generate a new renewal opportunity in the portfolio. The renewal opportunity will contain automatically generated renewal applications for any applicant eligible for renewal.

Renewal applications can be tracked from several places in the RAMS Scholarship HUB.


- Individual opportunities: On a renewal opportunity record, select Applications.
- Individual applicants: On an applicant record, select Applications. All past, present and projected future disbursements of the award will be available.
- Entire portfolios: On a renewal opportunity record, select Applications.
- Entire system: Go to Opportunity > Portfolios > Renewal Applications.

Within the renewal opportunity's Applications tab, locate the Category column (to see the status of their application) and Qualification Points column (to determine whether applicants have met the award renewal criteria). Other columns to monitor the status of each renewal, as well as take action to process renewal awards, are available.

Review process

Each department/unit can set up review committees for different opportunities.

All Archived

All Reviewer Groups  [Create a Reviewer Group](#)

Name	Scopes	Members	Attached?	Auto Assigns?
P+F Dean's Scholarship	Photography	0	Attached	No
School of World Studies (Italian Studies Fund)		6	Attached	Yes
Student Teacher Reviewer Group	Art Education	1	Detached	No
Temp general application review group		1	Attached	No
VCU School of Business Academy of Selling	School of Business	2	Detached	No
VCU School of Business and H&S - ECON	School of Business	4	Detached	Yes

Create reviewer groups

1. Go to Opportunity > Evaluators > Reviewer Groups.
2. At the top right, select Create a Reviewer Group.
3. Fill in the following information:
 - a. Name
 - b. Group Information: A description of the group for other administrators.
 - c. Public: Select to make this group available to all administrators.
 - d. Scopes: Select scope(s) to make this group available for specific opportunity administrators.
 - e. Source: Choose which opportunities and applications you want available for this group.
 - f. Assign Reviews: Choose how reviews are assigned to reviewers.
 - g. Only Review Qualified Applications: Select to exclude applicants who don't meet your group's qualification criteria.
4. Select Create Group.

Awarding process

Once the review committee has selected a recipient, the chair of the committee will notify the opportunity administrator for the department/unit. They should include the award name, student name and reason the applicant was chosen. The administrator will verify that the student meets the award requirements and that the opportunity administrator can offer the award to the applicant.

Offer awards to applicants

1. Select Opportunity > Portfolios > All.
2. From the Opportunities grid view, click View to access the opportunity being awarded.
3. To view qualified applicants, click on the Applications tab.

The screenshot shows the 'Mallory Callan Scholarship in Communication Arts' page. The 'Applications' tab is highlighted with a red arrow. The page displays the following information:

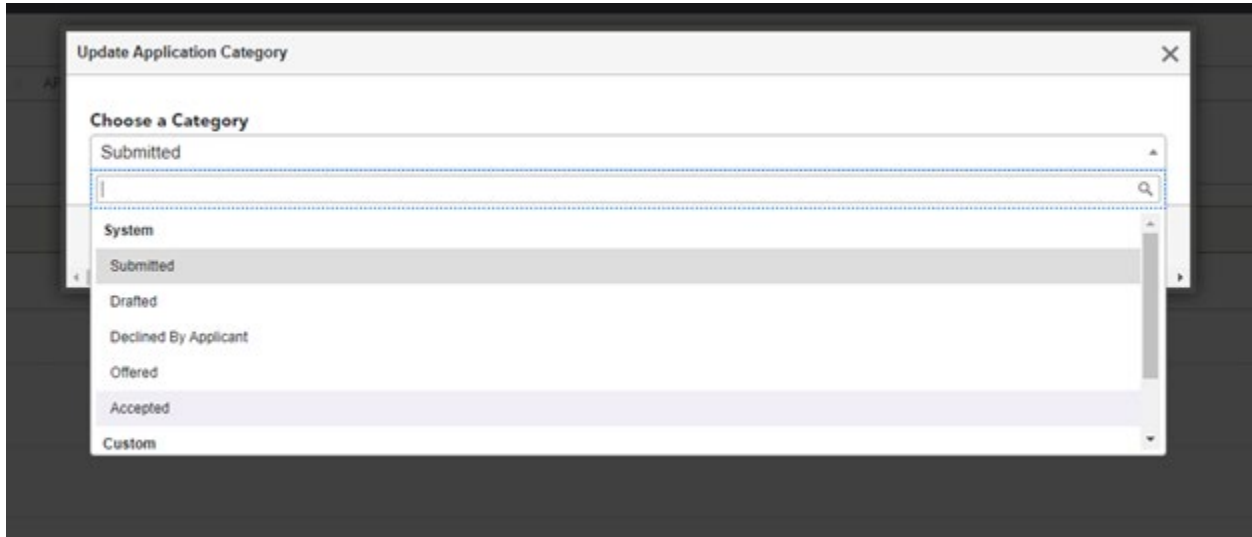
- Basic Information:**
 - Name: Mallory Callan Scholarship in Communication Arts
 - Fund Code: None Given
 - Auxiliary Fund Code: 640177
 - Project ID: None Given
 - Donor: None Given
 - Scopes: Communication Arts, School of the Arts, VCU Foundation
 - Visibility: Always Visible
- Fund Information:**
 - Foundation Account #: 0-61111
 - Money Source (current, endowed, other, unfunded): No Answer Given
 - Financial Aid Fund Code: EMCMS
 - Unit Controlled Identifier: No Answer Given
 - Banner Index #: 640177
- Financial Information:**

4. Select the applicant(s) being awarded.
 - a. Click View to see the application. This will show if the student is Qualified or Not Qualified.

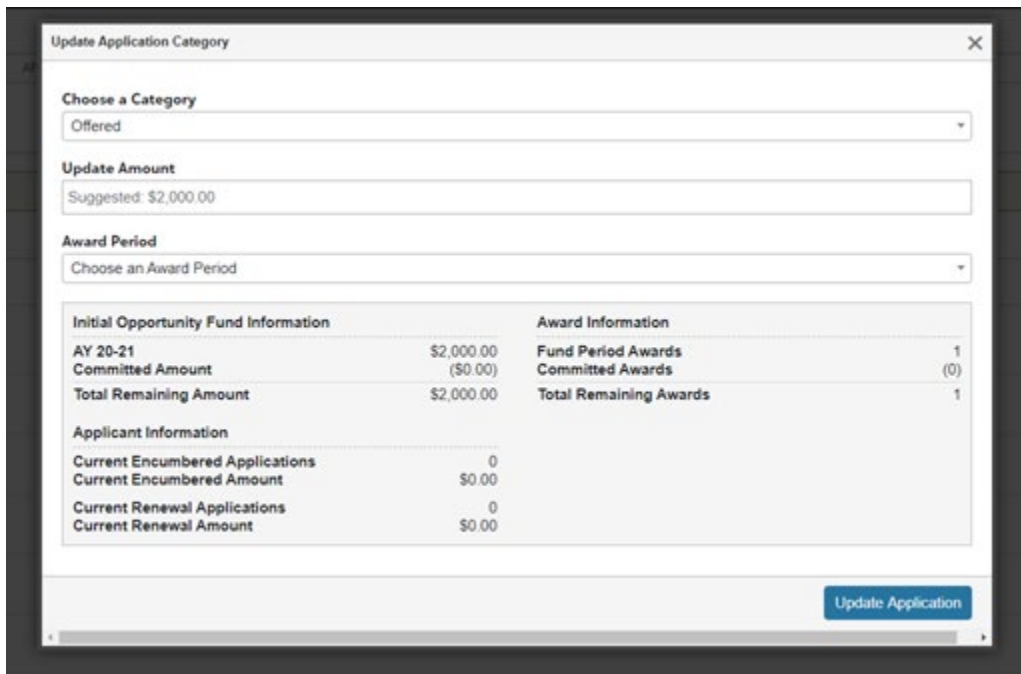
The screenshot shows the application page for 'Natthawut Pimsuwan'. The 'Show Qualifications' button is highlighted with a red arrow. The status 'Qualified in 1 of 1 qualification groups' is also highlighted with a red arrow.

- i. The student may no longer be eligible based on the qualifications, e.g., changed majors, changed enrollment status.
 - ii. To see the qualifications for the specific opportunity, click Show Qualifications.
5. Click Submitted.

6. Choose Offered from the drop-down menu.



7. Enter the award amount in **Update Amount** and select the corresponding **Award Period**.




8. Click **Update Application**.
9. An offer email will be queued for the student.
10. Once the email is approved, the student will receive an email prompting them to log in to the Scholarship HUB to accept the offer and complete a post-acceptance questionnaire.

Selection justification statement

Once a student is selected for an award, the department must provide a selection justification statement. This is a brief summary of why the student was selected over others. The field will be reviewed by DRE, OFA and Audit and Compliance Services to ensure compliance with donor intent and awarding guidelines. Examples of the statement:

- This applicant had the strongest essay.
- This applicant had the highest GPA.
- This was the top-ranked applicant based on reviewer scores.

Adding the selection justification statement

The screenshot shows a web application interface for award management. At the top, there is a navigation bar with 'Award Management', 'Site', 'Opportunity', and 'Stewardship'. Below this, there are tabs for 'Application', 'Administration', and 'Status'. The main content area displays 'StUARTS DEAN'S SCHOLARSHIP IN ART FOUNDATION - SPRING 2021 - APPLICATIONS - MORIA NEVE'. The applicant's name 'Moria Neve' is shown with a 'Submitted' and 'History' button. There are two text input fields: 'Special Awarding Instructions' and 'Selection Justification Statement'. The 'Selection Justification Statement' field is currently empty. An 'Update Application' button is located at the bottom right of the form.

1. Click **View** for the applicant being awarded.
2. Click on the **Administration** tab.
3. In the Selection Justification Statement field, type a brief statement about why the student was chosen.
4. Click **Update Application**.

Once the student is offered an opportunity, an email is generated informing the student and giving them instructions on how to accept the award in the RAMS Scholarship HUB.

Post-acceptance user guide

The post-acceptance process begins when applicants have formally accepted an award offer in the HUB. This step in the scholarship management cycle ensures appropriate donor stewardship.

Post-acceptance questionnaire

The post-acceptance application allows opportunity administrators to complete follow-up processing of awards before notifying the Office of Financial Aid to pay out the award. The in-system offer and post-acceptance emails notify the applicant that by accepting the award offer(s), the information they provide may be used for stewardship purposes, including donor communications. Each endowed opportunity has been populated with the following general requests for information so students can share information about themselves and express their gratitude:

- Hometown and state
- Expected graduation month and year
- Tell your scholarship donor about yourself. You might include your reasons for choosing VCU, your area of study and your interest in that field. If applicable, please note your involvement with campus organizations, internships and other activities.
- Discuss your future. What do you hope to accomplish at VCU? What are your educational and career plans and goals? How do you plan to utilize your degree?
- Express your gratitude for the scholarship. Describe the impact this scholarship has on your education and future.
- Attach a recent picture of yourself. The picture can be candid or formal. (Image upload)

Note: The administrator may request additional information from recipients if the opportunity has special considerations. **These questions should be included in addition to the standard questionnaire** that is automatically applied to all endowed (permanently restricted) opportunities for award recipients to complete and submit.

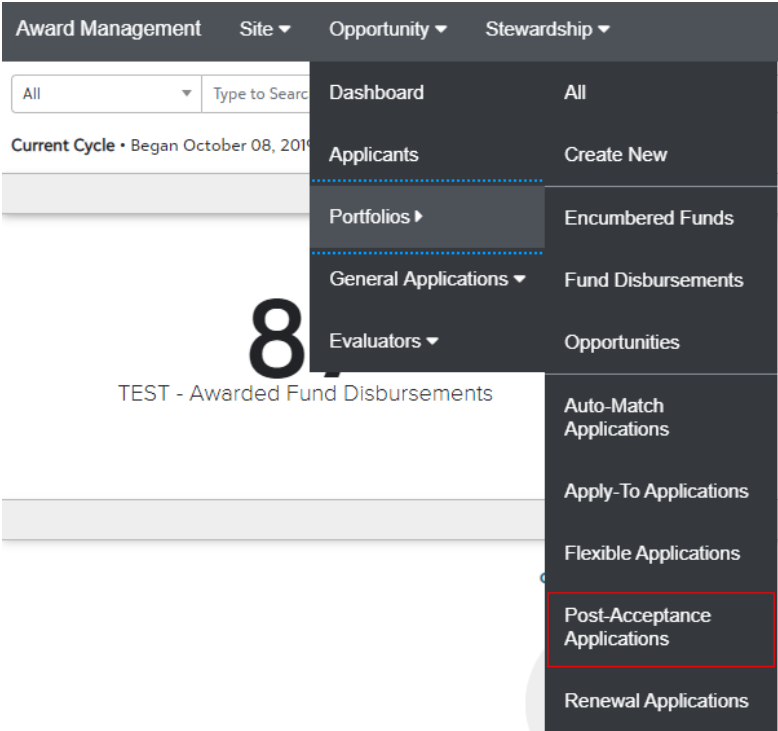
The post-acceptance questionnaire is used to generate thank-you notes to donors. Opportunity administrators or other designated stewardship staff are responsible for reviewing, merging and mailing thank-you notes generated for their school or unit.

If a student receives multiple scholarships, they must complete a post-acceptance application for each award (same responses are permissible).

**** NOTE: An application is considered incomplete if the post-acceptance questionnaire is not submitted, resulting in the non-disbursement of funds and possible revocation of the award. Should a student not complete their post-acceptance application within two weeks of being awarded a scholarship, stewardship administrators must send an email reminding the student to do so.**

Process

Because the post-acceptance process takes place after the application process, monitoring post-acceptance applications occurs in a different part of the opportunity. After an applicant officially accepts an award offer in the system, administrators can begin monitoring the applicant’s post-acceptance application from the opportunity’s Post-Acceptance Applications page.



If the applicant declines the award, or if an administrator later determines the applicant must be declined for other reasons, the administrator must work with the appropriate parties to select another recipient. Otherwise, the post-acceptance application will disappear from the system, since there is no longer a disbursement of funds to track. The post-acceptance process is not equivalent to [renewal management or renewable awards](#).

All opportunity applications in the Offered or Accepted categories will also have an entry in your Post-Acceptance Applications grid. The grid tracks award offers after the application process has been completed. It has five categories to organize and track actual awarding of funds:

- **Pending:** An award offer has been extended, but the applicant has not yet accepted or declined the offer.
- **Requested:** An award offer has been accepted, but the applicant has not yet completed the post-acceptance questionnaire.
- **Drafted:** The applicant has started responding to the post-acceptance questionnaire but has not yet completed it.
- **Submitted:** The post-acceptance questionnaire has been completed and is waiting for review by an administrator.



- **Awarded:** An administrator has determined the award can be made and that the funds can be disbursed.

To categorize a post-acceptance application as Awarded (that is, the post-acceptance questionnaire has been vetted and funds should be disbursed), administrators should:

1. Return to the opportunity's Post-Acceptance Applications page.
2. Locate the post-acceptance application and click the View link to open the application. Administrators can view applicant responses on this page.
3. To update the category of the application, select Choose a Category and select which category to move the applicant into (for example, Awarded).
4. Once the next window opens, administrators can update the post-acceptance application to the Awarded category. They can also update the award amount or adjust the Award Period tag.
5. Once an administrator moves the post-acceptance application into Awarded, the applicant can see visual confirmation on their Applications page.

Important reminders

- It is the school's or unit's responsibility to prompt the recipient to complete their post-acceptance questionnaire if the recipient is unresponsive.
- Currently, there is no deadline for post-acceptance applications; it is preferred that the scholarship recipient submit this ASAP, however.
- **Read and review** all student responses to ensure that no inappropriate, false or inflammatory language is present.
- Stewardship administrators or relevant DAR staff are responsible for merging and mailing thank-you letters to donors. Donor contact information must come from RADAR.
- Consider using the thank-you letter template provided by DAR to merge questionnaire responses (via Microsoft Word mail merge).
- Once thank-you letters are drafted, they should be scanned and uploaded to RADAR as an interaction, linking both the donor(s) and recipient as participants.

Details	Responses	Documentation	Attributes
Details  Edit 			
Owner:	Elaine Innis	Expected date:	8/23/2019 Actual date: 8/23/2019
Status:	Completed	Expected start time:	Actual start time:
Category:	Stewardship	Expected end time:	Actual end time:
Subcategory:	Stewardship Move	Time zone:	Location:
Contact method:	Mail		
Event:			
Summary:	2019-20 scholarship recipient thank you		
Participants:	Jack Schiltz; H. Schiltz 1979; Szhanesha Becoat		
Comment:	Sent donor the 2019-20 scholarship recipient thank you		

Posting and disbursing the scholarship

Once the student accepts and completes the post-acceptance application, the award can be processed through the Office of Financial Aid and Scholarships or through the Graduate School. Opportunity Administrators can download a funds disbursement report once new awards have been accepted. Information on the spreadsheet for award disbursement should include:

- VCU ID
- Student Name
- Student Status: UG or GR/PR
- Department/School
- Award Name
- Financial Aid Fund Code
- Banner Index
- Semester(s) of award
- Money Source (current, endowed, etc.)
- Amount

Download fund disbursement report

1. Go to Opportunity > Portfolios > Fund Disbursements.

Fund Disbursements

Complete View													1-50 of 1139	Page 1
View	ID	Disbursement...	Category	Categorized At	Award Period	Portfolio Name	Flexible Oppo...	Name	Primary Email	Email Aliases	UID	Scopes	Init	
View	1...	Post-Acceptance	Pending	06/17/2020	Fall 2020	Virginia A. Arno...	No	Kaylee Mutter	mutterkm@vcu...	mutterkm@vcu...	mutterkm	VCU Foundation, S...		
View	1...	Post-Acceptance	Submitted	06/18/2020	Fall 2020	Virginia A. Arno...	No	Casey Thompson	thompsoncj3@...	thompsoncj3@...	thompsoncj3	VCU Foundation, S...		
View	1...	Post-Acceptance	Pending	06/17/2020	Fall 2020	Virginia A. Arno...	No	Anna McGrady	romanoal@vcu...	romanoal@vcu...	romanoal	VCU Foundation, S...		
View	1...	Post-Acceptance	Pending	06/17/2020	AY20-21	KPMG Honors ...	No	Linh Tran	tranl9@vcu.edu	tranl9@vcu.edu	tranl9	VCU Foundation, S...		
View	1...	Post-Acceptance	Pending	06/17/2020	AY20-21	KPMG Honors ...	No	Regis Naupari	apesteguiare@...	apesteguiare@...	apesteguiare	VCU Foundation, S...		
View	1...	Post-Acceptance	Pending	06/17/2020	AY20-21	Eva S. Hardy ...	No	Ruxandra Zait	zaitrm@vcu.edu	zaitrm@vcu.edu	zaitrm	SOB Foundation, S...		
View	1...	Post-Acceptance	Submitted	06/17/2020	Fall 2020	Merit Scholars...	No	Brian Ferrell	ferrellbj@vcu.edu	ferrellbj@vcu.edu	ferrellbj	SOB Foundation, S...		
View	1...	Post-Acceptance	Drafted	06/17/2020	AY20-21	Charles G. Tha...	No	Elizabeth Kantl...	kantlehnee@v...	kantlehnee@v...	kantlehnee	SOB Foundation, S...		
View	1...	Post-Acceptance	Submitted	06/17/2020	Fall 2020	Altria MBA Sch...	No	Jesseeca Ngu...	nguyenj15@vc...	nguyenj15@vc...	nguyenj15	SOB Foundation, S...		
View	1...	Post-Acceptance	Submitted	06/17/2020	Fall 2020	Louis and Beat...	No	Jesseeca Ngu...	nguyenj15@vc...	nguyenj15@vc...	nguyenj15	SOB Foundation, S...		

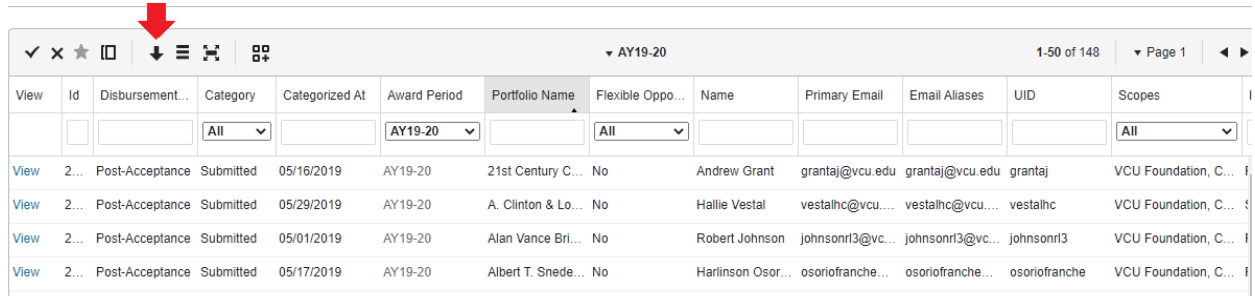
2. Update the Grid View: Choose correct scope, award period and category Submitted.
 - a. You can save this grid view by clicking the "Create new view from the current grid state" button at the top left.
 - b. Type in the name you want to save as and click **Complete**.

Fund Disbursements

AY19-20													1-50 of 148	Page 1
View	ID	Disbursement...	Category	Categorized At	Award Period	Portfolio Name	Flexible Oppo...	Name	Primary Email	Email Aliases	UID	Scopes	Init	
View	2...	Post-Acceptance	Submitted	05/16/2019	AY19-20	21st Century C...	No	Andrew Grant	grantaj@vcu.edu	grantaj@vcu.edu	grantaj	VCU Foundation, C...		
View	2...	Post-Acceptance	Submitted	05/29/2019	AY19-20	A. Clinton & Lo...	No	Hallie Vestal	vestalh@vcu...	vestalh@vcu...	vestalh	VCU Foundation, C...		
View	2...	Post-Acceptance	Submitted	05/01/2019	AY19-20	Alan Vance Bri...	No	Robert Johnson	johnsonr3@vc...	johnsonr3@vc...	johnsonr3	VCU Foundation, C...		
View	2...	Post-Acceptance	Submitted	05/17/2019	AY19-20	Albert T. Snede...	No	Harlinson Osor...	osoriofranche...	osoriofranche...	osoriofranche	VCU Foundation, C...		

3. Download report and save as Excel file.

Fund Disbursements



View	Id	Disbursement...	Category	Categorized At	Award Period	Portfolio Name	Flexible Oppo...	Name	Primary Email	Email Aliases	UID	Scopes
View	2...	Post-Acceptance	Submitted	05/16/2019	AY19-20	21st Century C...	No	Andrew Grant	grantaj@vcu.edu	grantaj@vcu.edu	grantaj	VCU Foundation, C...
View	2...	Post-Acceptance	Submitted	05/29/2019	AY19-20	A. Clinton & Lo...	No	Hallie Vestal	vestalhc@vcu....	vestalhc@vcu....	vestalhc	VCU Foundation, C...
View	2...	Post-Acceptance	Submitted	05/01/2019	AY19-20	Alan Vance Bri...	No	Robert Johnson	johnsonr3@vc...	johnsonr3@vc...	johnsonr3	VCU Foundation, C...
View	2...	Post-Acceptance	Submitted	05/17/2019	AY19-20	Albert T. Snede...	No	Harlinson Osor...	osoriofranche...	osoriofranche...	osoriofranche	VCU Foundation, C...

- a. Delete extra columns of information and keep only the columns Financial Aid will need.
4. Send to the scholarship coordinator in Financial Aid for posting/disbursing.

Cycle Management

Cycle management preserves historical records and prepares the system for a new round of applications. During cycle management, the RAMS Scholarship HUB:

- Saves historical records of different parts of the system.
- Clones applications, reviewer groups, opportunities and post-acceptance questionnaires for a new round of applicants.

Cycle management for the RAMS Scholarship HUB is performed once a year at the end of fall semester.

Purpose of Cycle Management

Cycle management is performed to:

- Archive old applications to protect information from being changed.
- Make sure only current applicants are present in the system.
- Make changes to opportunity questions, criteria and more, without affecting previous applications.
- Help admins find information more quickly.

Preparing for cycle management

Before cycle management is requested, departments/units must:

1. Finish collecting General and Conditional applications.
2. Finish reviewing General and Conditional applications.

Additional recommendations for actions prior to cycle management:

- **Close all opportunities.** Make sure you've set the end date for apply-to opportunities and the internal end date for auto-match opportunities.
- **Evaluate your progress.** If opportunity reviews, awarding or post-acceptance is still being worked on, request that those opportunities not be archived.
- **Close General Application.** To prevent new applicants from filling out a General Application, set an end date on the application.
- **Evaluate General and Conditional application questions.** On each question, you can choose to save answers for the next cycle. Applicants can still edit these answers.

Glossary

- **Apply-To:** An opportunity that requires an applicant to manually apply for the scholarship and complete any additional requests that may be required. If an applicant meets the minimum criteria for this type of opportunity, the RAMS Scholarship HUB will include the opportunity on the applicant's Recommended Opportunities list.
- **Auto-Match:** An opportunity that automatically reviews all students to capture those who meet the qualifications. If an applicant meets the minimum criteria for an Auto-Match Opportunity, an application will be generated and placed into the application profile without further action by the applicant.
- **Conditional Application:** An application used to target a specific group of applicants as a follow-up or additional step beyond the General Application. It is an additional application that can have its own details, questions, qualifications, start and end dates, reviews and assigned scopes.
- **Dashboard:** A view of the RAMS Scholarship HUB that shows a real-time picture of your school/unit's current opportunities and applications.
- **General Application:** A questionnaire, usually comprised of broad, generic, applicant-facing questions, to gather basic information about applicants to advance them in the matching, applying, reviewing and awarding process. The General Application is the basis of the system, as it is the first step applicants must take before being matched to opportunities.
- **Grid:** Used to organize information, create exports and perform bulk actions. Allows users to filter data to show only desired information.
- **Opportunity:** A scholarship, award, fellowship or grant that applicants apply for. An opportunity contains all application materials (questions, qualifications, etc.) as well as individual applications related to a single award.
- **Portfolio:** A single heading that bundles related opportunities. Portfolios contain details about related opportunities that do not change from year to year, such as fund codes, scopes and financial information. The portfolio is created first; subsequent opportunities are then created to collect applications and make awards for specific periods.
- **Qualification Group:** Group that contains the qualification criteria for an applicant to be eligible for the scholarship (i.e. minimum GPA, major, classification status, etc.).
- **Recommended Opportunities:** A list of all the opportunities the RAMS Scholarship HUB has determined the applicant meets the minimum qualification for, and is therefore eligible for

consideration. A recommended opportunity requires the applicant to apply to individually via the Conditional Application.

- **Scope:** An organizational label used in the system to indicate an area of interest, focus or responsibility. Opportunity administrators must have scopes added to their account to gain access to the portfolios, opportunities, applications, reviewer groups and/or reference questionnaires.
- **Student Import:** Student data that is imported each day from Banner into the RAMS Scholarship HUB. The data includes enrollment information, classification, major, etc.
- **Supplemental Questions:** Scholarship application questions that the applicant must answer to apply for an Apply-To Opportunity. The questions are more specific; they aren't broad enough to ask on a General or Conditional Application.