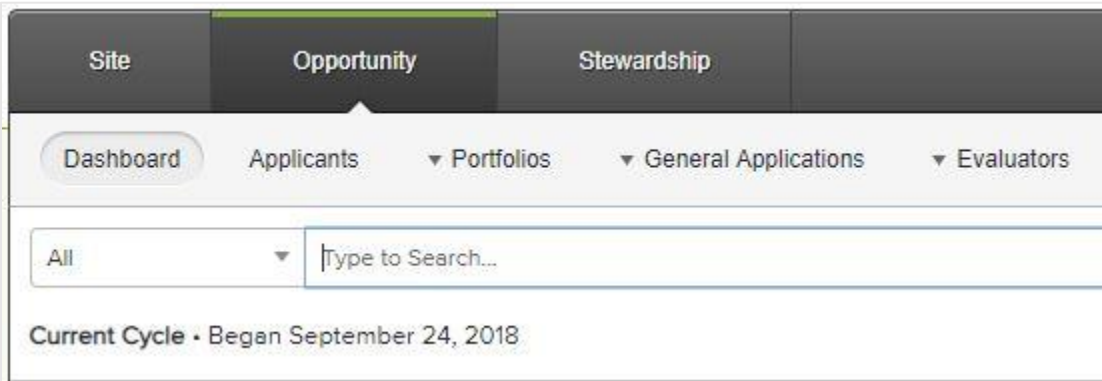# UM SCHOLARSHIP PORTAL
*Blackbaud Award Management*
February 8, 2019

IMPLEMENTATION FOR DEPARTMENTS, SCHOOLS AND COLLEGES:

STEPS:

1. Contact the Financial Aid office and work with them as well as establish an Opportunity Administrator who will be in charge of setting up future scholarships.
2. Set up a training time with the Financial Aid office.
    a. Discussion about current administration processes, what you would like to use the portal for.
    b. How to set up departmental scholarship in the scholarship portal.
3. Set up your department scholarships in the portal.
    - Once you've signed in to the scholarship portal, you will want to go to opportunity.

   - From the Opportunity, you will want to hover over the Portfolios tabs, then click on 'All'. It will then bring you to a list of your scholarships. Similar to the screen shot below.
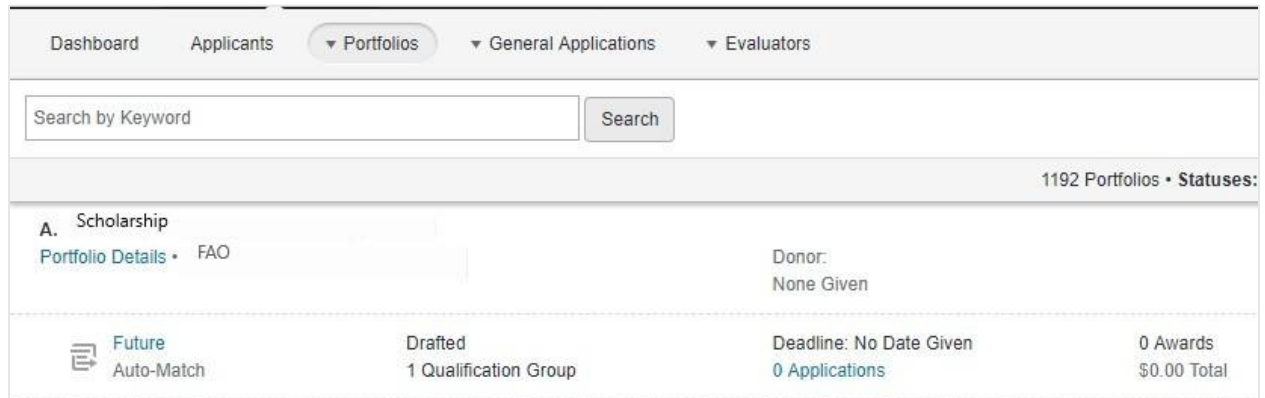
   - To begin you will want to click on the scholarship you will be working on. To do this you can click on 'Future' listed under the name of the scholarship. From here you would review the scholarship's description and use of gift.
        o Please note that the title Future will change, once an opening date is assigned.

- To select 'auto-match' or 'apply to', and set open and close dates will be under the 'Details' tab. This is the first page you land on once you've clicked 'Future'.

- Once you are on the details tab you will want to determine whether the opportunity should be "auto-match" or "apply to".
    - 'Auto-match' allows the award to be automatically match to a student based on them matching all of the required criteria.
    - 'Apply-to' means that student's match all of the required criteria but that there is additional information that they may need to provide to the department. Such as a resume, etc.

- After selecting the type of award you will want to add dates to the scholarship. Make sure to enter the 'start date' and 'public end date' so that the application can be made available to students. If the application is an 'apply to' and is being reviewed you will want to set the 'begin review period' and 'end review period dates'. Once you enter the dates, make sure you click 'update application' to save the information.

- The next tab that you will see next to 'Details' is 'Questions'. If your type of award is an "apply-to" than here is where you would list your additional criteria, such as please upload a copy of your resume. If your award is an 'auto-match' you can skip this tab and go straight to 'Qualifications'. Don't forget to click 'update application' to save the information.

- Next is the 'Qualifications' tab. Here is where you would select the criteria needed to be eligible for this scholarship. The qualifications pull directly from the General Scholarship Application. Don't forget to click 'update application' to save the information.

If you have any questions, regarding the steps provided on this handout please contact the Financial Aid office at 406-243-5373