

# BOSS Awarding Handbook

# Table of Contents

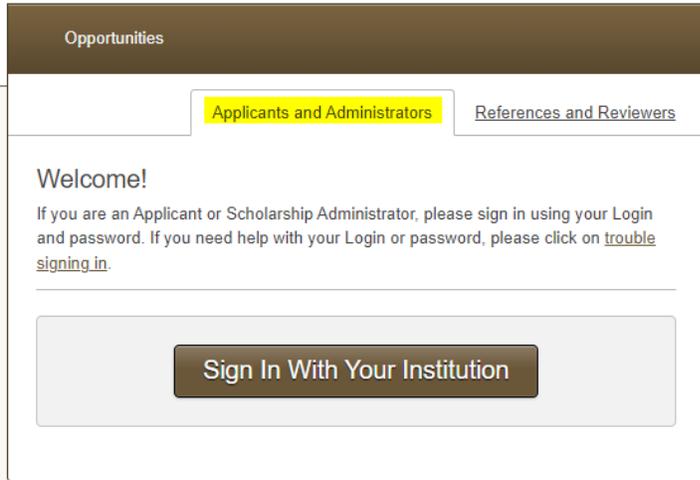
(Hold Ctrl and click link below to jump to section)

<b>Logging into BOSS</b> .....	<b>4</b>
<b>Dashboard</b> .....	<b>5</b>
<b>Viewing All Scholarship Opportunities</b> .....	<b>6</b>
Key Information - All Scholarship Opportunities .....	6
Creating a Dashboard Card - All Scholarship Opportunities.....	7
Downloading a Report - All Scholarship Opportunities .....	9
<b>Locating Specific Scholarship Opportunities</b> .....	<b>10</b>
<b>Scholarship Opportunity Information</b> .....	<b>12</b>
Scholarship Details .....	12
Questions Tab .....	14
Qualifications Tab .....	15
Applications Tab .....	15
Communications Tab .....	16
Reviews Tab .....	16
Post-Acceptance Tab.....	17
<b>Awarding Procedures</b> .....	<b>18</b>
Revising Offer Correspondence .....	18
Determining Qualified Applicants .....	20
Create Your Own View .....	21
Making a Scholarship Offer .....	23
Selecting the Correct Award Period .....	24
<b>Adjusting Existing Awards</b> .....	<b>25</b>
Increasing an Existing Award.....	25
Cancelling a Full Award .....	27
Cancelling a Partial Award .....	28
<b>Approving Post-Acceptance Applications</b> .....	<b>31</b>
What is Post-Acceptance? .....	31
Reviewing Post-Acceptance .....	31
Final Approval of Post-Acceptance .....	34
Pending Post-Acceptance - Sending Email Reminders.....	37
<b>Disbursement Reports</b> .....	<b>39</b>
<b>Viewing Log of Emails Sent to Student</b> .....	<b>41</b>

**Other Notes .....42**  
    Endowment and SAP Information .....42  
    Scholarship Awarding Deadlines.....42  
    BOSS Timeline .....43  
    Disbursements to Students .....43  
**Contact .....44**

# Logging into BOSS

1. Navigate to [boss.txstate.edu](https://boss.txstate.edu).
2. Under the *Applicants and Administrators* tab, click *Sign In With Your Institution*.



3. Log in using your Net ID and password. Do not use an alias email if you have one.



Login to AcademicWorks -  
Texas State University

> [Forgot your password?](#)

> [Need Help?](#)

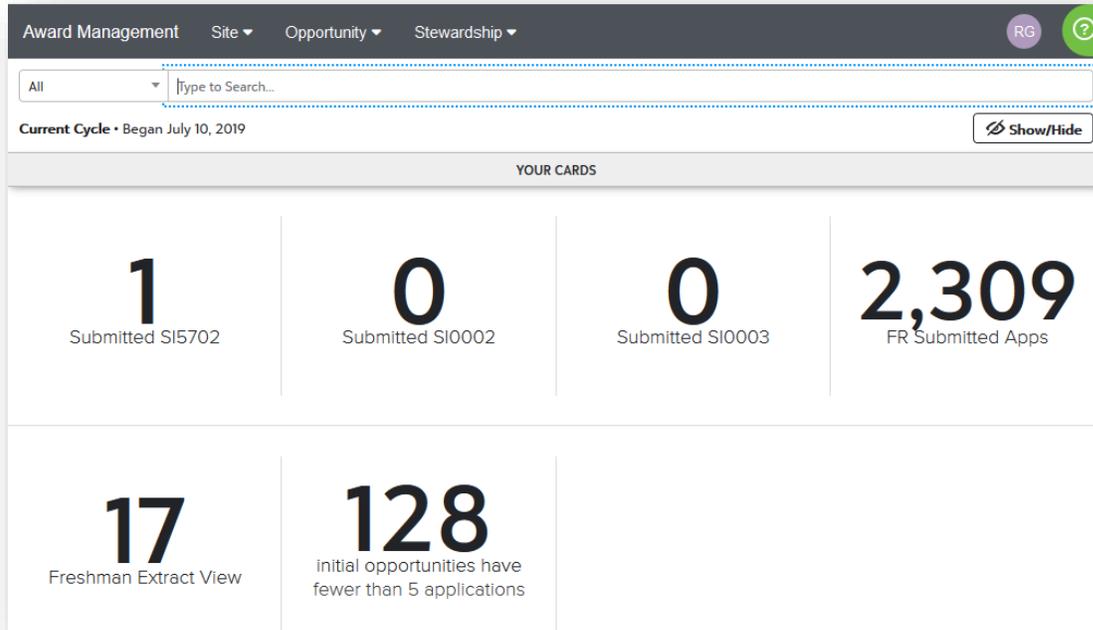
**Username**

**Password**

Login

# Dashboard

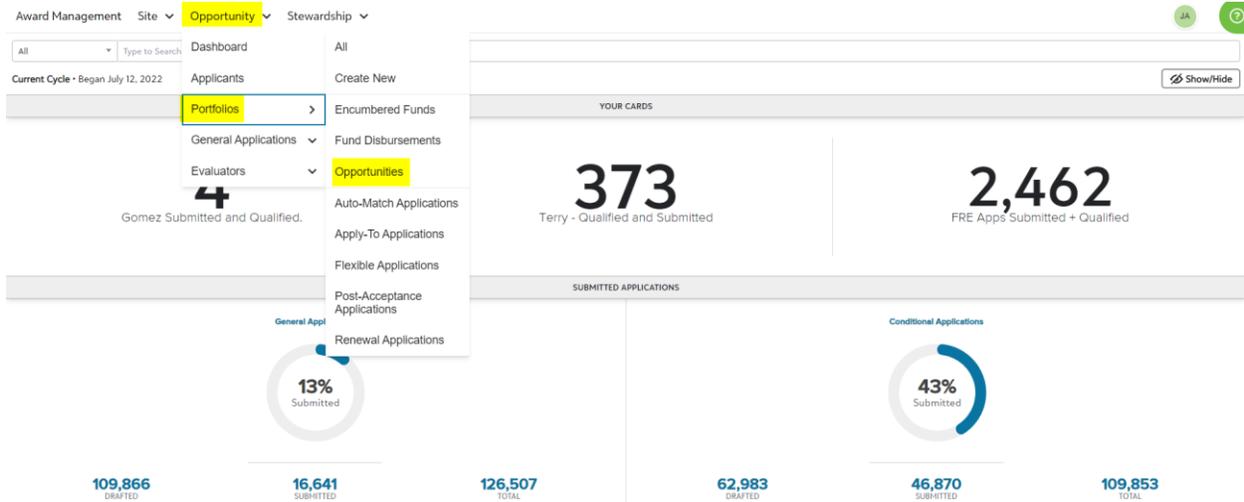
The BOSS landing page is referred to as your **Dashboard**. The **Your Cards** section is a tool that allows you to create custom **Dashboard Cards** to display up-to-date information about your scholarships. Dashboard Cards may be created in various pages through BOSS and will be addressed later in this manual.



All other information on the Dashboard is static and provides you with general information about your scholarships.

# Viewing All Scholarship Opportunities

1. Click *Opportunity > Portfolios > Opportunities*. This will allow you to view scholarship information for all current and past opportunities in BOSS.



2. The default view will be for Academic Year 2023-2024 Opportunities.

Opportunities

View	Type	Opportunity S...	Fund Period	Code	Auxiliary Code	Name	Fund Period Amount	Fund Period R...	Start At	End At
<input type="checkbox"/>	View	All	Academic Year 2023 - 2024							
<input type="checkbox"/>	View	Apply-To	Academic Year 2023 - 2024	SE6071	67754	Ward Lee Eggleston Memorial Scholarship (SE6071)	\$0.00	\$0.00	11/01/2022	02/28/2023
<input type="checkbox"/>	View	Auto-Match	Academic Year 2023 - 2024	SR5115	67720	Lorine Ramsdell (SR5115)	\$0.00	\$0.00	11/01/2022	02/28/2023
<input type="checkbox"/>	View	Auto-Match	Academic Year 2023 - 2024	SB5084	68166	Karen R. Barganier Memorial Scholarship (SB5084)	\$0.00	\$0.00	11/01/2022	02/28/2023
<input type="checkbox"/>	View	Auto-Match	Academic Year 2023 - 2024	SL0017		Res Life Living-Learning Communities Scholarship (SL0017)	\$0.00	\$0.00	01/01/2023	04/01/2023
<input type="checkbox"/>	View	Auto-Match	Academic Year 2023 - 2024	SR5111		Residence Life Scholarship (SR5111)	\$0.00	\$0.00	01/01/2023	04/01/2023

## Key Information - All Scholarship Opportunities

**Type** will be either Auto-Match or Apply-To.

**Auto-Match** refers to a scholarship that is linked to the Conditional application. Students must complete the Conditional application and are matched to the scholarship opportunities that they qualify for. An additional scholarship application is not needed.

**Apply-to** refers to a scholarship that requires applicants to answer supplemental questions. An additional scholarship application is needed.

**Fund Period** is the academic year the funds will be awarded.

**Code** refers to the Banner Fund Code. This is associated with your SAP account to ensure funds are drawn from the correct account.

**Auxiliary Code** refers to the Development Fund for endowed accounts.

**Fund Period Amount** is the amount added to BOSS based on the Distribution Report provided by the Endowment Services office. Non-endowed accounts will not have a Fund Period Amount added unless the awarding department lets the Scholarships office know how much will be awarded. This amount does not need to be entered in BOSS but is used more for reference. This number is not tied to an SAP account.

**Fund Period Remaining** refers to the remaining Fund Period Amount after awards have been made.

**Start At** and **End At** dates indicate when the application is open for students to apply.

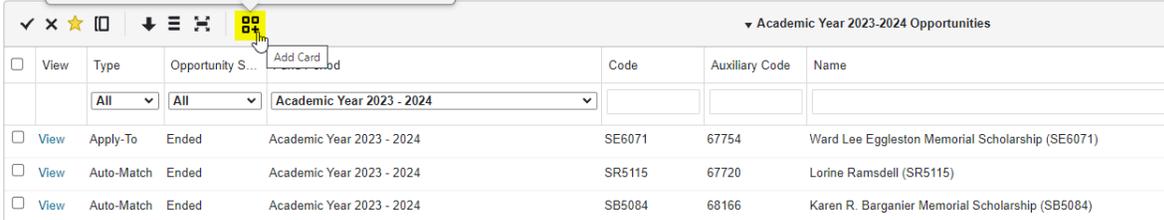
**Begin Reviews** and **End Reviews** refers to the committee review period.

**Qualified Applicants** refers to the number of applications that have been submitted that meet the eligibility criteria for the scholarship.

## Creating a Dashboard Card - All Scholarship Opportunities

1. To create a Dashboard Card for your 2023-2024 Opportunities, click the *Add Card* icon.

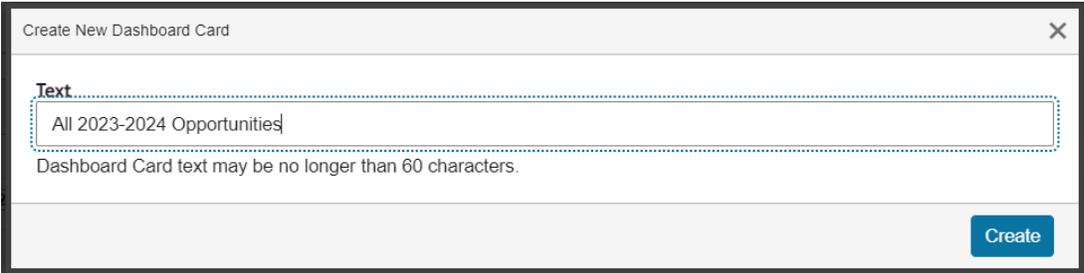
Oppc Create a new dashboard card from the current grid state (5 cards remaining)



The screenshot shows a table titled "Academic Year 2023-2024 Opportunities". The table has columns for "View", "Type", "Opportunity S...", "Code", "Auxiliary Code", and "Name". There are three rows of data. A yellow callout box points to an "Add Card" icon in the top toolbar.

View	Type	Opportunity S...	Code	Auxiliary Code	Name	
<input type="checkbox"/>	All	All	Academic Year 2023 - 2024			
<input type="checkbox"/>	Apply-To	Ended	Academic Year 2023 - 2024	SE6071	67754	Ward Lee Eggleston Memorial Scholarship (SE6071)
<input type="checkbox"/>	Auto-Match	Ended	Academic Year 2023 - 2024	SR5115	67720	Lorine Ramsdell (SR5115)
<input type="checkbox"/>	Auto-Match	Ended	Academic Year 2023 - 2024	SB5084	68166	Karen R. Barganier Memorial Scholarship (SB5084)

2. Name the Dashboard Card and click *Create*.



The screenshot shows a dialog box titled "Create New Dashboard Card". It has a text input field containing "All 2023-2024 Opportunities". Below the input field, it says "Dashboard Card text may be no longer than 60 characters." There is a "Create" button at the bottom right.

Create New Dashboard Card

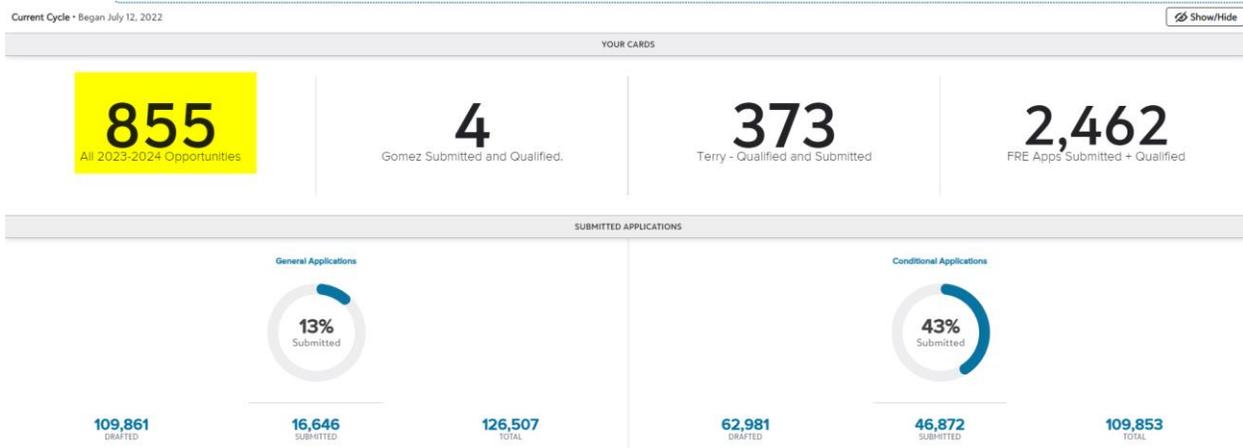
Text

All 2023-2024 Opportunities

Dashboard Card text may be no longer than 60 characters.

Create

### 3. Your Dashboard Card is now created.

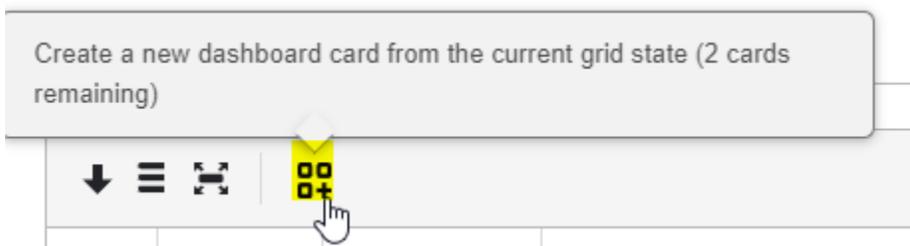


### 4. You may also choose to create a Dashboard Card for other Fund Periods. To do so, use the drop-down to switch the Fund Period.

Opportunities

▼ Academic Year 2023-2024 Opportunities							
View	Type	Opportunity S...	Fund Period	Code	Auxiliary Code	Name	Fund Period Amount
		All	Academic Year 2023 - 2024				
View	Auto-Match	Ended	Academic Year 2023 - 2024	SG0022	48045	Federico and Martha Gorbea Scholarship (SG0022)	\$0.00
View	Auto-Match	Ended	Academic Year 2021 - 2022	SA0012	48006	Accounting Club Endowed Scholarship (SA0012)	\$0.00
View	Apply-To	Ended	Academic Year 2020 - 2021	SK0022	46004	J.B. and Kelly Kolodzey International Business Endowment (SK0022)	\$0.00

### 5. Click the Add Card icon.



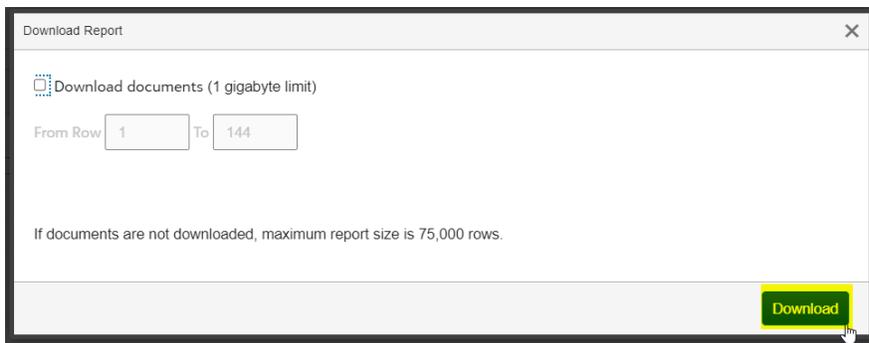
# Downloading a Report - All Scholarship Opportunities

1. Click the download icon to download an Excel report.

Opportunities

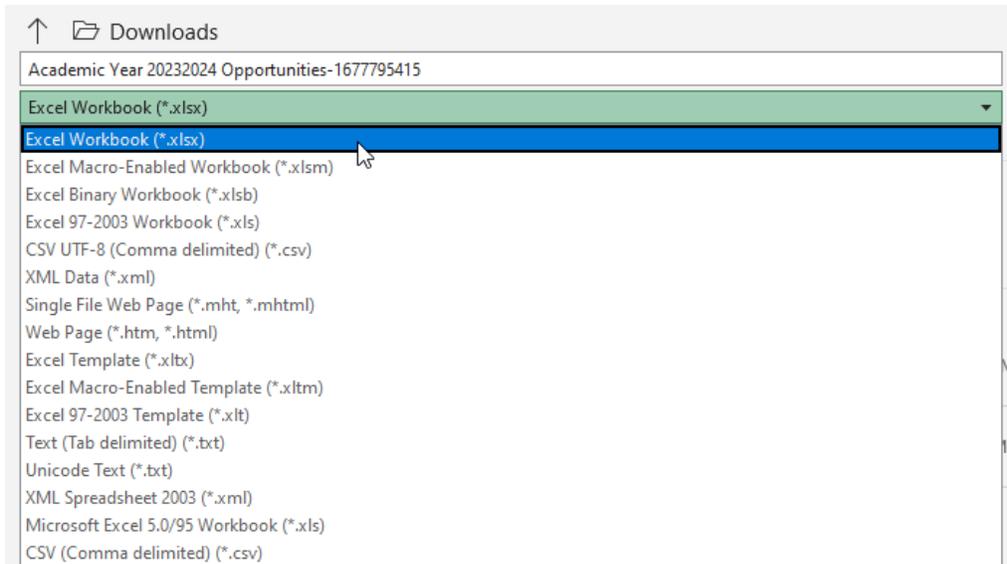
View	Type	Opportunity S...	Fund Period	Code	Auxiliary Code	Name	Fund Period Amount	Fund Period Remaining	Start At	End At
All	All	Academic Year 2022 - 2023								
View	Auto-Match	Ended	Academic Year 2022 - 2023	SW6590	67445	Gary V. Woods Scholarship - Graduate (McCoy - SW6590)	\$0.00	-\$12,000.00	11/01/2021	02/01/2022
View	Auto-Match	Ended	Academic Year 2022 - 2023			McCoy College of Business - CIS Review Portfolio	\$0.00	\$0.00	11/01/2021	02/07/2022
View	Auto-Match	Archived	Academic Year 2022 - 2023	ST6322	67816	DNU-Lawrence E. and Bonnie Nance Tilton Scholarship - Graduate ...	\$0.00		11/01/2021	02/01/2022

2. Click Download.



3. After a moment, refresh your browser and click the link.

4. Make sure to save as an Excel Workbook. If you leave the file as a CSV file type, your edits to the spreadsheet will not be saved.

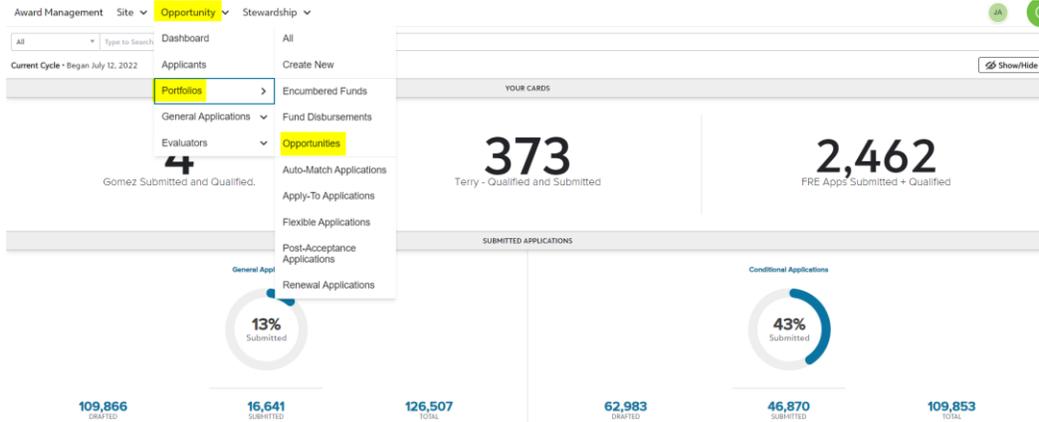


# Locating Specific Scholarship Opportunities

There are two ways to view your specific scholarship opportunities.

## Option 1

1. Click *Opportunity > Portfolios > Opportunities*.



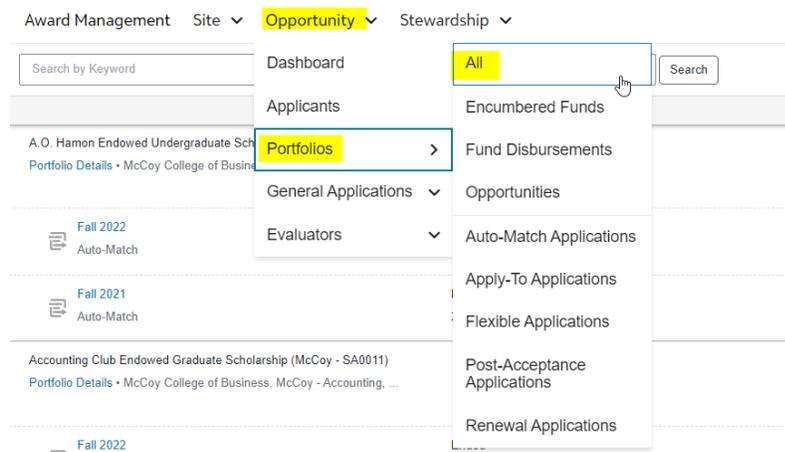
2. Right click *View* next to the specific Opportunity and then *Open link in new tab*.

Opportunities

View	Type	Opportunity S...	Fund Period	Code	Auxiliary Code	Name	Fund Period Amount
All	All	Academic Year 2023 - 2024					
View	Auto-Match	Ended	Academic Year 2023 - 2024	SG0022	48045	Federico and Martha Gorbea Scholarship (SG0022)	\$0.00
View	Open link in new window		cademic Year 2023 - 2024	SA0012	48006	Accounting Club Endowed Scholarship (SA0012)	\$0.00
View	Open link in incognito window		cademic Year 2023 - 2024	SK0022	46004	J.B. and Kelly Kolodzey International Business Endowment (SK00...	\$0.00
View	Save link as...		cademic Year 2023 - 2024	SK0004	48034	Jodi and Darrell Kirksey Endowed Scholarship (SK0004)	\$0.00
View	Copy link address		cademic Year 2023 - 2024	SC5612	48018	Richard and Kathy Clay Endowed Scholarship (SC5612)	\$0.00
View	LastPass		cademic Year 2023 - 2024	SS0062	48049	Thomas Dee Seargeant - Greater Texas Federal Credit Union Sc...	\$0.00
View	Inspect		cademic Year 2023 - 2024	SW6590	67445	Gary V. Woods Scholarship - Graduate (McCoy - SW6590)	\$0.00
View	Auto-Match	Ended	Academic Year 2023 - 2024	SW6590	67445	Gary V. Woods Scholarship - Graduate (McCoy - SW6590)	\$0.00

## Option 2

1. Click *Opportunity > Portfolios > All*.



2. Scroll to the specific Opportunity or search by keyword or Banner Fund Number.

3. Click the relevant *Season Stamp*.

Terry Foundation Scholarship (ST5180)		ST5180	
Portfolio Details • Financial Aid and Scholarships, FAS-Freshmen, F...		Donor: None Given	
 Fall 2023	Ended	Deadline: 01/08/2023	0 Awards
Apply-To	31 Questions • 2 Qualification Groups	878 Applications	\$0.00 Total
 Fall 2022	Ended	Deadline: 01/09/2022	20 Awards
Apply-To	26 Questions • 2 Qualification Groups	865 Applications	\$0.00 Total

Two opportunities will always be viewable in BOSS. A trick to selecting the correct opportunity is to look at the *Deadline* for guidance. If you are awarding for the upcoming academic year, you will likely choose the first opportunity. If you are re-awarding mid-year, you will likely use the second opportunity.

4. Scroll down to the *Award Information* section to ensure you are in the correct Academic Year.

### Award Information

Fund Period Academic Year 2023 - 2024

## Scholarship Opportunity Information

There are several tabs within each scholarship Opportunity. Important information for each tab is shared below.

Details Questions Qualifications Applications Communications Reviews Post-Acceptance

### Scholarship Details

Details Questions Qualifications Applications Communications Reviews Post-Acceptance

This will allow you to view general information about the scholarship, such as the amount of money it offers, the description, and the open and close dates.

**Example:**

#### Financial Information

Financial Information

Academic Year 2022 - 2023	Fund Period Amount	\$5,100.00
Fall 2021 Automatch	Committed Amount	(\$5,100.00)
	Total Remaining Amount	\$0.00

Endowed accounts will have the **Fund Period Amount** added to BOSS based on the Distribution Report provided by the Endowment Services office. Non-endowed accounts will not have a Fund Period Amount added unless the awarding department lets the Scholarships office know how much will be awarded.

The **Committed Amount** is the total of the scholarship offers made.

Total **Remaining Amount** is the amount left to be offered.

#### Opportunity Specific Information

Opportunity-Specific Information

Description	Scholarships will be awarded to graduate/doctoral students pursuing degrees in the College of Education. The recipient should be a member of A+ Federal Credit Union.
Type	Auto-Match
Post-Acceptance	Enabled
Source	College of Education Private Donor Scholarships
Match Drafted	No
Visible Award Amount	Varies
Hide Applicant Name From Reviewers?	None Given
Opportunity Reviewer Note	None Given
Propagate Scores	Yes

The **Description** lets students know the history of the scholarship account, the eligibility criteria, etc.

There are two **Types** of Scholarships:

**Auto-Match** refers to a scholarship that is linked to the Conditional application. Students must complete the Conditional application and are matched to the scholarship opportunities that they qualify for. An additional scholarship application is not needed.

**Apply-to** refers to a scholarship that requires applicants to answer supplemental questions. An additional scholarship application is needed.

**Source** refers to the Conditional application the Auto-Match is linked to.

### Dates

Dates

<b>Start Date</b>	11/01/2021
<small>Beginning of Day</small>	
<b>Public End Date</b>	02/28/2022
<small>End of Day</small>	
<b>Internal End Date</b>	07/01/2022
<small>End of Day</small>	
<b>Begin Review Period</b>	None Given
<small>Beginning of Day</small>	
<b>End Review Period</b>	None Given
<small>End of Day</small>	
<b>Post-Acceptance End Date</b>	None Given
<small>End of Day</small>	
<b>Archive Date</b>	None Given
<small>Beginning of Day</small>	

**Start Date** and **Public End Date** are the dates that the application opens and closes to students.

**Begin Review Period** and **End Review Period** are the dates the submitted applications are available for committee members to review. None Given means that review period dates have not been set. Please contact the [BOSSScholarships@txstate.edu](mailto:BOSSScholarships@txstate.edu) to have dates added.

### Award Information

Award Information

<b>Fund Period</b>	Academic Year 2022 - 2023
<b>Fund Period Amount</b>	\$5,100.00
<b>Fund Period Awards</b>	0
<b>Opportunity amount</b>	\$5,100.00
<small>The total funds available.</small>	
<b>Opportunity awards</b>	0
<small>The number of awards available.</small>	
<b>Minimum award amount</b>	None Given
<small>The minimum amount possible to award.</small>	
<b>Maximum award amount</b>	None Given
<small>The maximum amount possible to award.</small>	

**Fund Period** is the academic year the funds will be awarded.

**Fund Period Amount** is the original amount available to award.

## Questions Tab

[Details](#)

**Questions**

[Qualifications](#)

[Applications](#)

[Communications](#)

▼ [Reviews](#)

▼ [Post-Acceptance](#)

This will take you to any questions that applicants need to answer in order to apply.

**Example:**

### **Applicant Tab**

College of Science and Engineering  
▼ Current

Notes (1) History

Add Applicant Question

Applicant Administrator Reviewable

Order	Text	Field	Required	Reviewable	Type	Actions
≡	Write a personal essay discussing your career objectives, plans, and why you chose your major. Discuss your education and research goals. If you plan to go on to professional school (i.e., medical school, dental school, etc.) or graduate studies, describe your reasons and future plans. Explain why (other than for financial assistance) you feel deserving of a scholarship.	10635	<input checked="" type="checkbox"/>	Yes	Essay	Edit ✕
≡	Upload a resume and/or CV highlighting experience relevant to your major and future goals. Include membership and leadership in student organizations.	10636	<input checked="" type="checkbox"/>	Yes	File Upload	Edit ✕

The two questions above are required for this scholarship.

### **Reviewer Tab**

College of Science and Engineering  
▼ Current

Notes (1) History

Applicant Administrator **Reviewable**

Reviewable?	Field	Label	Required?	Answered By	Type	Source
<input type="checkbox"/>	Select					
<input type="checkbox"/>	All					
<input checked="" type="checkbox"/>	10035	TXST Student ID	Imported	Applicant	Short Answer	Import File
<input checked="" type="checkbox"/>	10045	First Name	Imported	Applicant	Short Answer	Import File
<input checked="" type="checkbox"/>	10046	Middle Initial	Imported	Applicant	Short Answer	Import File
<input type="checkbox"/>	10047	Last Name	Imported	Applicant	Short Answer	Import File

Certain application questions or data fields may be hidden from Reviewers. In this example, the applicant's last name will be hidden.

Your department may choose to hide information and only display information that is relevant to the scholarship.

## Qualifications Tab

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

This will let you see eligibility criteria which students will have to meet in order for them to be eligible for the opportunity. Additionally, if they do not meet the eligibility criteria at the close date, they will not be sent to the review stage, unless we specifically allow them to.

### Example:

✕ 'CP1 College Code' must include FA.

✕ 'CP1 Level of Study' must include UG.

✕ 'CP1 Major Code' must include MUTH.

✕ 'CP1 Semester' must not be blank .

✕ 'Is the student deceased?' must not include Yes.

✕ 'SGASTDN Status' must include AS.

✕ 'SGASTDN Student Type' must include C, F, R, T or S.

5 conditional application matches based on this group

[Duplicate Group](#)
[Delete Group](#)

This **Qualification Group** shows that students must be: in the College of Fine Arts, by Undergraduate, have Musical Theatre as major, be an Active Student, and be either a Continuing, Freshman, Re-admit, Transfer or Second Bachelor student.

If a student has at least one **Qualification Point**, it means that they have met all the criteria in at least one Qualification Group to be eligible for the scholarship.

## Applications Tab

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

This will send you to a grid of your applicants where you can view student Banner information and their application responses.

This screen will also tell you whether a student is qualified for a scholarship or not. If a student has any number greater than 0 in the column “Qualification Points,” they meet the eligibility criteria set up for your scholarship.

### Example:

▼ Complete View											
<input type="checkbox"/>	View	Award Mode	ID	Category	Categori...	Qualification Points	Name	SGASTDN Student Type	Classification	CP1 College ...	CP1 Major Code
<input type="checkbox"/>	View	Award Mode	2...	Submitted	01/10/2023	1		C	SR	FA	MUTH
<input type="checkbox"/>	View	Award Mode	2...	Submitted	01/01/2023	1		C	JR	FA	MUTH
<input type="checkbox"/>	View	Award Mode	2...	Submitted	02/28/2023	1		C	SO	FA	MUTH
<input type="checkbox"/>	View	Award Mode	2...	Submitted	02/28/2023	1		C	FR	FA	MUTH
<input type="checkbox"/>	View	Award Mode	2...	Submitted	01/30/2023	1		C	SR	FA	MUTH



# Post-Acceptance Tab

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

This is where you can view the post-acceptance thank you letters that have been submitted for the specific scholarship opportunity.

Bring Bobcats Back – Crankstart Re-entry Scholars (SB0020) Notes History

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

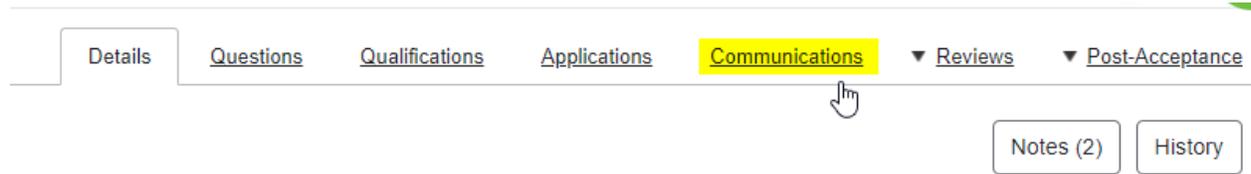
Complete View 1-11 of 11 Page 1

<input type="checkbox"/>	View	ID	Category	Categori...	Name	Primary Email	Email Aliases	UID	Award Period	Amount	Renewal...	Iteration	Anticipat...	Upload a phot...	Congratulations!
<input type="checkbox"/>	View	2...	Awarded	08/10/2022					2223_FALL_SPR	\$5,000.00			\$0.00	<a href="#">View Image</a>	August 9, 2022...
<input type="checkbox"/>	View	2...	Awarded	08/09/2022					2223_FALL_SPR	\$5,000.00			\$0.00	<a href="#">View Image</a>	Dear Donor, Th...
<input type="checkbox"/>	View	2...	Awarded	08/15/2022					2223_FALL_SPR	\$5,000.00			\$0.00	<a href="#">View Image</a>	August 12, 202...
<input type="checkbox"/>	View	2...	Awarded	08/12/2022					2223_FALL_SPR	\$5,000.00			\$0.00	<a href="#">View Image</a>	My name is Br...

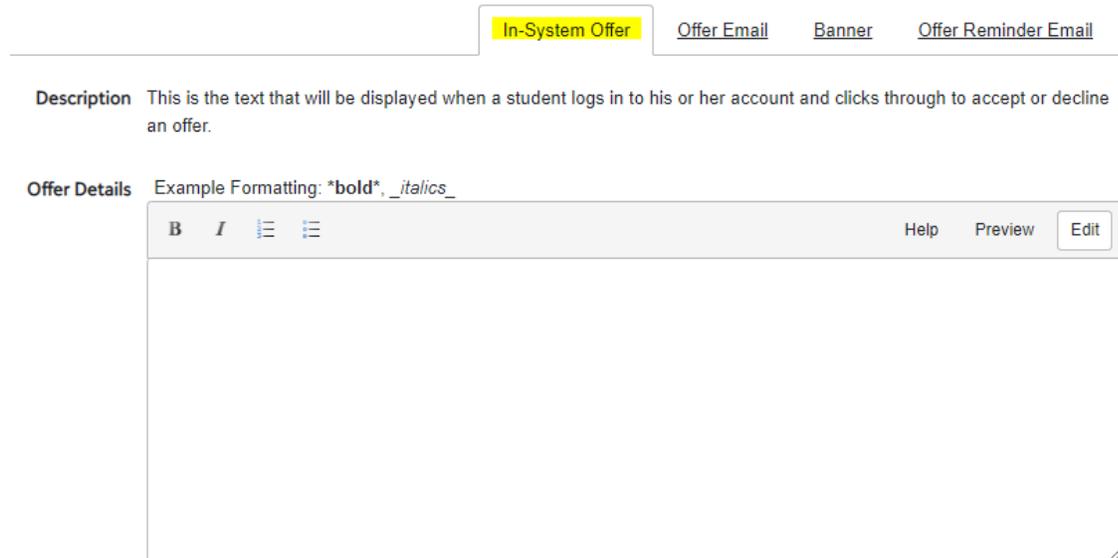
# Awarding Procedures

## Revising Offer Correspondence

1. Once you have located the correct Opportunity, click on the *Communications* tab. When an offer is made in BOSS, an offer email is automatically sent to the student. Be sure to review/edit the communication being sent before making the offer.



2. **In-System Offer** – This is what the student will see when logging in to BOSS to accept their award. You can enter reminders for the student such as how many hours they must be enrolled in for the funds to disburse, if they must remain in a specific major, or any renewal criteria.



**3. Offer Email** – Below is a sample of the generic offer email that is sent. You may edit this letter to include acceptance deadlines, eligibility criteria, renewal criteria, post-acceptance instructions, etc.

The delivery of the offer email may be set to Immediately or Never. Click *Update Email Template* after making any changes.

In-System Offer **Offer Email** Banner Offer Reminder Email

**Description** Updating the Offer - Email template on this page will detach this opportunity's template from the system Offer - Email template. This will result in any changes to the system template not being reflected on this opportunity's template.

**Subject** You have been selected for the {{ portfolio name }} award!

**Body** Example Formatting: **"bold"**, *italics*

Dear {{ applicant.name }},

Congratulations! You have been selected to receive the following opportunity via BOSS: {{ portfolio name }}. You can view the details of this award by visiting BOSS at the following link:

"{{ offer\_url }}"-{{ offer\_url }}

You will need to log-in to BOSS and accept the award.

Thank you for your time in reviewing this communication.

Sincerely,

Full Screen

**Available Merge Fields** offer\_url applicant.name applicant.email portfolio.name application.applicant\_url application.amount application.award\_term donor\_profile\_links

**Deliver When** Immediately

**Update Email Template**

**3. Post-Acceptance Email** – Below is a sample of the generic post-acceptance email that is sent at the same time as the offer email. You may edit this letter to include post-acceptance instructions.

The delivery of the Post-Acceptance email may be set to Immediately or Never. Click *Update Email Template* after making any changes.

In-System Offer Offer Email Banner Offer Reminder Email **Post-Acceptance Email** Post-Acceptance Banner

**Description** Updating the Post-Acceptance - Email template on this page will detach this opportunity's template from the system Post-Acceptance - Email template. This will result in any changes to the system template not being reflected on this opportunity's template.

**Subject** You need to finish your application for the {{ portfolio name }} award!

**Body** Example Formatting: **"bold"**, *italics*

Dear {{ applicant.name }},

Your application for the following opportunity {{ portfolio name }} needs additional information in BOSS. Please update your application at the link below:

"{{ post\_acceptance\_application\_url }}"-{{ post\_acceptance\_application\_url }}

Please submit any required materials as soon as possible, as awards will not be disbursed until you have submitted all post-acceptance requirements. Additionally, all post-acceptance must be approved by an administrator after submission.

Thank you for your time in reviewing this communication.

Sincerely,

Full Screen

**Available Merge Fields** post\_acceptance\_application\_url applicant.name applicant.email portfolio.name application.applicant\_url application.amount application.award\_term donor\_profile\_links

**Deliver When** Immediately

## Determining Qualified Applicants

1. Click the *Applications* tab to view all applications.



2. Your applicant pool will likely default to the Complete View, which includes applications that are either not qualified (0 Qualification Points) and/or are in Drafted status (the student did not submit their application by the deadline). You will need to filter these students out before making your offers.

▼ Complete View													
<input type="checkbox"/>	View	Award Mode	ID	Category	Categori...	Applied On	Qualification Points	Name	Primary Email	Email Aliases	UID	Award Period	Amount ...
<input type="checkbox"/>	View	Award Mode	2...	Submitted	01/09/2023	01/08/2023	1	Anally Marquez	soccerlover697...	soccerlover697...	ndh64@txstate...		\$0.00
<input type="checkbox"/>	View	Award Mode	2...	Submitted	01/08/2023	01/08/2023	0	Jaydon Justice	jaydonjustice1...	jaydonjustice1...	ixo15@txstate...		\$0.00
<input type="checkbox"/>	View	Award Mode	2...	Submitted...	01/18/2023	01/08/2023	1	Aylin Guzman	aylinaguzman...	aylinaguzman...	dxm25@txstat...		\$0.00
<input type="checkbox"/>	View	Award Mode	2...	Drafted	01/08/2023	01/08/2023	0	Robert Mancha	robertmancha1...	robertmancha1...	dcd122@txstat...		\$0.00
<input type="checkbox"/>	View	Award Mode	2...	Submitted	01/08/2023	01/08/2023	1	Valerie Chavez	mayflowervalie...	mayflowervalie...	ejs168@txstat...		\$0.00

3. Choose the **Submitted** Category and type “>0” into the Qualification Points column. The hit *Enter*.

▼ Complete View											
<input type="checkbox"/>	View	Award Mode	ID	Category	Categori...	Applied On	Qualification Points	Name	Reviewer Score	Primary Email	
<input type="checkbox"/>				Submitted			>0				
<input type="checkbox"/>	View	Award Mode	2...	Submitted	08/17/2022	08/17/2022	1		66.0		
<input type="checkbox"/>	View	Award Mode	2...	Submitted	08/23/2022	08/22/2022	1		72.0		
<input type="checkbox"/>	View	Award Mode	2...	Submitted	01/23/2023	08/29/2022	1		77.0		
<input type="checkbox"/>	View	Award Mode	2...	Submitted	10/09/2022	08/29/2022	1		57.0		

4. Click the Reviewer Score column header until you see the scores sorted from highest to lowest. You will now see your ranked candidates who are eligible for the scholarship as they are qualified and have submitted the application.

▼ Complete View											
<input type="checkbox"/>	View	Award Mode	ID	Category	Categori...	Applied On	Qualification Points	Name	Reviewer Score	Primary Email	
<input type="checkbox"/>				Submitted			>0				
<input type="checkbox"/>	View	Award Mode	2...	Submitted	11/27/2022	11/13/2022	1		94.0		
<input type="checkbox"/>	View	Award Mode	2...	Submitted	01/08/2023	01/06/2023	1		93.0		
<input type="checkbox"/>	View	Award Mode	2...	Submitted	11/30/2022	11/06/2022	1		92.0		

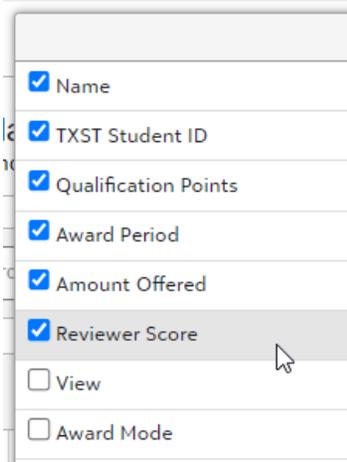
## Create Your Own View

5. **Steps 5 through 9 are not required to make a scholarship offer, you may choose to do them to organize your applicant grid to Create Your Own View.**

First, you may limit the of viewable columns on your grid by clicking the hamburger icon.

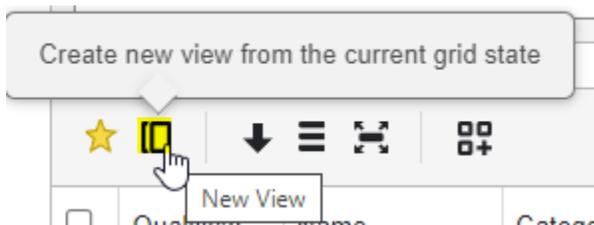


6. Select only the columns you wish to view. At minimum, be sure to include the columns below. You may also wish to include academic data (such as major and GPA) and applicant data (responses to application questions).

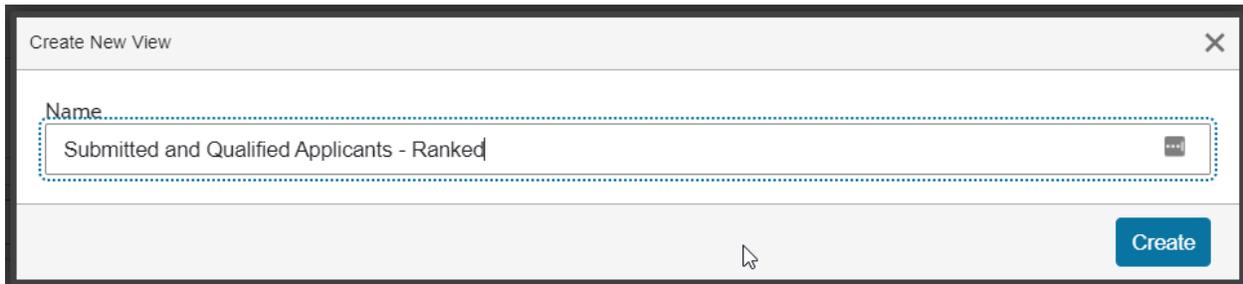


7. You can then rearrange the order of your columns by clicking on the column header and dragging.

8. After formatting your data, make sure to create the new view by clicking the *New View* icon.



9. Name the new view and click *Create*.



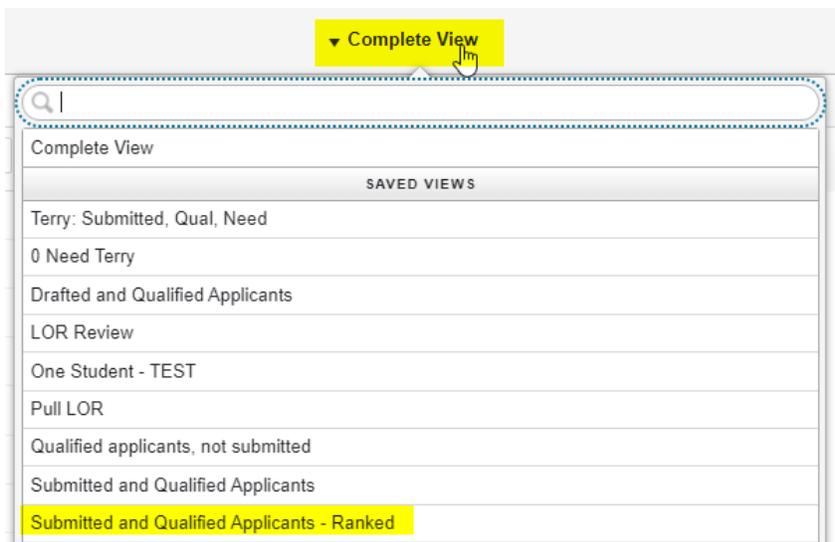
Create New View

Name

Submitted and Qualified Applicants - Ranked

Create

10. You can now click Complete View to toggle between your saved views.



▼ Complete View

Q |

Complete View

SAVED VIEWS

Terry: Submitted, Qual, Need

0 Need Terry

Drafted and Qualified Applicants

LOR Review

One Student - TEST

Pull LOR

Qualified applicants, not submitted

Submitted and Qualified Applicants

Submitted and Qualified Applicants - Ranked

## Making a Scholarship Offer

1. Select the student(s) you wish to offer.

*Multiple students may be offered at the same time only if they will all be receiving the same amount for the same award period. A spreadsheet tool is available if your department does mass awarding. Please contact the Scholarships office if this may be relevant for your purposes.*

 Terry Foundation Scholarship (ST5180)  
▼ Fall 2023 | Ended 52 days ago | Imports stopped 45 days ago

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

▼ Submitted and Qualified Applicants - Ranked

<input type="checkbox"/>	Qualificat...	Name	Category	Award Period	Amount ...	Reviewer...
<input type="checkbox"/>	>0		Submitted	All		
<input checked="" type="checkbox"/>	1		Submitted		\$0.00	94.0
<input type="checkbox"/>	1		Submitted		\$0.00	93.0

2. Scroll down to *Act on Selected*.



3. Choose *Categorize*.



4. Select the *Offered Category*, enter the dollar amount of the scholarship in the *Update Amount* field, select the *Award Period\**, then click *Categorize*.

\*See below for notes on how to select the correct Award Period.

*If you are awarding multiple students at once, enter the dollar amount per student. For example, if you will award \$5,000 to 2 students (total of \$10,000), you will enter \$5,000 into BOSS.*

Categorize Selected ✕

**Choose a Category**

**Update Amount**  
  
Amount must be less than or equal to \$5,000.00.

**Award Period**

Initial Opportunity Fund Information		Award Information	
Academic Year 2023 - 2024	\$0.00	Fund Period Awards	0
Committed Amount	(\$90,000.00)	Committed Awards	(18)
Total Remaining Amount	(\$90,000.00)	Total Remaining Awards	-18

## Selecting the Correct Award Period

### Award Period Reference:

2223_SPR_ONLY	Amount is for spring 2023 only.
2223_SUM_ONLY	Amount is for summer 2023 only.
2324_FALL_SPR	Amount will be evenly divided between fall 2023 and spring 2024.
2324_FALL_ONLY	Amount is for fall 2023 only.
2324_SPR_ONLY	Amount is for spring 2024 only.

**Please reach out to the Scholarships office if you are unsure about which Award Period to choose.**

5. You will be directed back to the applicant grid. After a minute or so, refresh your page to view the new scholarship offer and confirm that that correct award period and dollar amount have been entered for the intended students.

★ ID
▼ Complete View

<input type="checkbox"/>	View	Award Mode	ID	Category	Categori...	Qualificat...	Name	Primary Email	Email Aliases	UID	Award Period	Amount ...	General ...
<input type="checkbox"/>				All							All		
<input type="checkbox"/>	View	Award Mode	2...	Offered	01/04/2023	1					2324_FALL_SPR	\$5,000.00	

# Adjusting Existing Awards

All adjustments to existing awards will take place on the Applications tab in BOSS.

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

Prior to making any adjustments, make note of the **Category** of the existing award. It's important to use the same Category as the existing award when making an adjustment.

## Increasing an Existing Award

1. The existing award below is in the *Offered* Category and is \$5,000 for 2324\_FALL\_SPR.

**Example:** You would like to award an additional \$200.

Details   Questions   Qualifications   **Applications**   Communications   Reviews   Post-Acceptance

Patti Strickel Harrison Scholarship (SS6634)  
Fall 2023 | Ended 72 days ago | Imports stop in 118 days

Notes   History   Award Mode

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

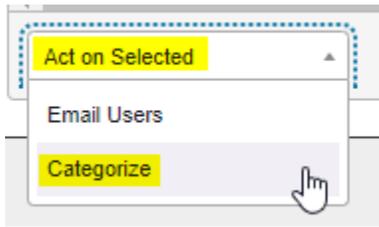
Complete View   1-50 of 162   Page 1

View	Award Mode	ID	Category	Categori...	Qualifica...	Name	Primary Email	Email Aliases	UID	Award Period	Amount ...	General ...	Conditio...	Opportu...	Reviewe...	Assigned...	Comple...
<input type="checkbox"/>	View		All							All							
<input type="checkbox"/>	View	Award Mode	2...	Offered	01/04/2023	1				2324_FALL_SPR	\$5,000.00					0	0

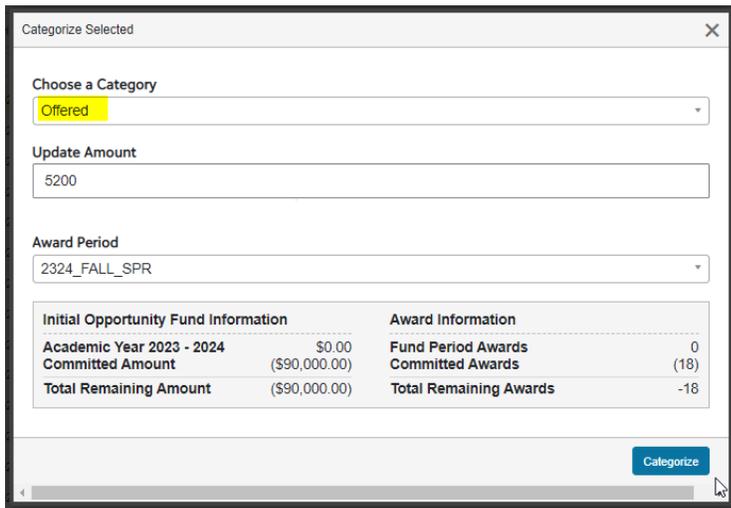
2. Select the student.

View	Award Mode	ID	Category	Categori...	Qualifica...
<input type="checkbox"/>	View		All		
<input checked="" type="checkbox"/>	View	Award Mode	2...	Offered	01/04/2023 1
<input type="checkbox"/>	View	Award Mode	2...	Accepted	01/04/2023 2

3. Scroll to the bottom of the page and click on *Act on Selected* and click *Categorize*.

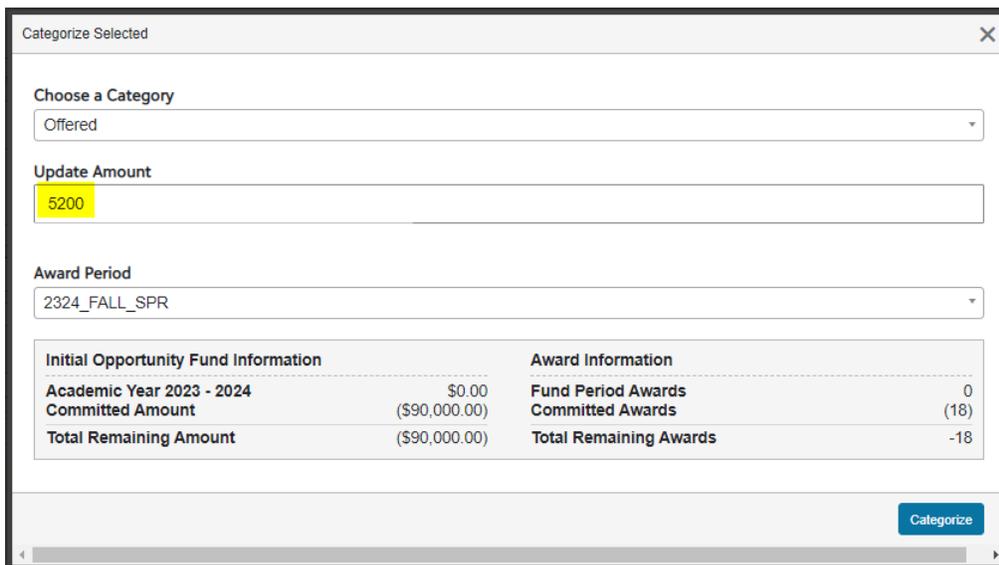


4. Enter the same Category as the existing award. (In this example, the award was in the Offered Category. If the award were already Accepted on the Applications tab, select Accepted).



Initial Opportunity Fund Information		Award Information	
Academic Year 2023 - 2024	\$0.00	Fund Period Awards	0
Committed Amount	(\$90,000.00)	Committed Awards	(18)
Total Remaining Amount	(\$90,000.00)	Total Remaining Awards	-18

5. Update the Amount to the total amount that should be awarded to the student. (In this example, the student was already awarded \$5,000 and we are adding \$200, so *the correct amount to enter here is \$5,200.*)



6. Select the *Award Period* and then *Categorize*.

Categorize Selected ✕

**Choose a Category**

**Update Amount**

**Award Period**

Initial Opportunity Fund Information		Award Information	
Academic Year 2023 - 2024	\$0.00	Fund Period Awards	0
Committed Amount	(\$90,000.00)	Committed Awards	(18)
Total Remaining Amount	(\$90,000.00)	Total Remaining Awards	-18

Categorize

## Cancelling a Full Award

You may need to cancel a full award in one of these situations:

- a student does not accept a scholarship by the deadline, and you would like to cancel the offer and re-offer to another student
- a student does not attend in the fall semester
- a student becomes ineligible for the award (such as changing to an ineligible major or not enrolling in the required number of hours)

1. The existing award below is in the *Offered* Category and is \$5,000 for *2324\_FALL\_SPR*.

**Example:** *This student does not accept their offer by the deadline, and you would like to cancel and re-offer to another student.*

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

Patti Strickel Harrison Scholarship (SS6634)  
▼ Fall 2023 | Ended 72 days ago | Imports stop in 118 days

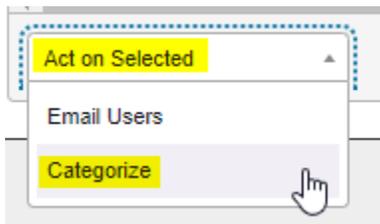
Begin typing to search by name, email address, or user ID...

★	☰	☰	☰	☰	▼ Complete View										1-50 of 162	▼ Page 1	◀	▶
View	Award Mode	ID	Category	Categori...	Qualifica...	Name	Primary Email	Email Aliases	UID	Award Period	Amount ...	General ...	Conditio...	Opportu...	Reviewe...	Assigned...	Comple	
<input type="checkbox"/>	View	Award Mode	2...	Offered	01/04/2023	1				2324_FALL_SPR	\$5,000.00						0	0

2. Select the student.

<input type="checkbox"/>	View	Award Mode	ID	Category	Categori...	Qualifica
<input checked="" type="checkbox"/>	View	Award Mode	2...	Offered	01/04/2023	1
<input type="checkbox"/>	View	Award Mode	2	Accepted	01/04/2023	2

3. Scroll to the bottom of the page and click on *Act on Selected* and click *Categorize*.



4. Choose the *Cancelled Admin* Category and select *Categorize*.



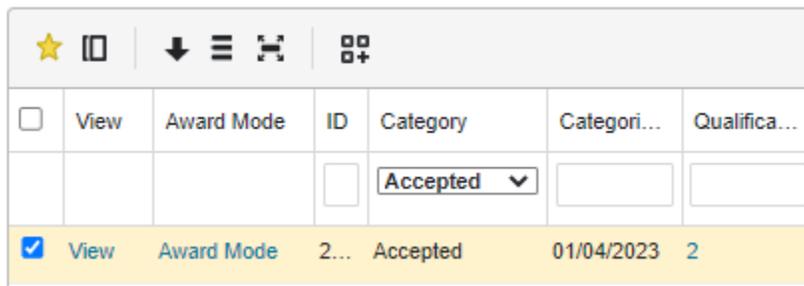
## Cancelling a Partial Award

**Example:** A student was awarded \$5,000 for fall and spring but graduates in the fall and does not attend the spring semester.

In this example, we would change the \$5,000 fall/spring award to \$2,500 fall only.

<input type="checkbox"/>	View	Award Mode	ID	Category	Categori...	Qualifica...	Name	Primary Email	Email Aliases	UID	Award Period	Amount ...
<input type="checkbox"/>	View	Award Mode	2...	Accepted	01/04/2023	2					All	2324_FALL_SPR \$5,000.00

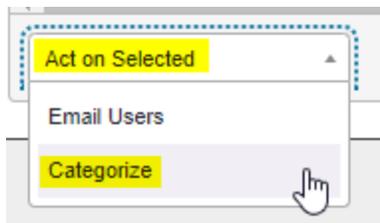
1. Select the student.



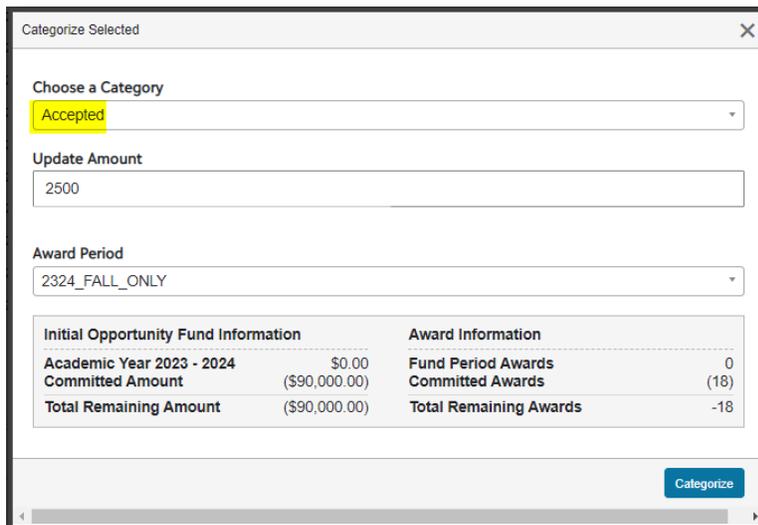
The screenshot shows a toolbar with icons for star, print, download, list, refresh, and grid. Below it is a table with columns: View, Award Mode, ID, Category, Categori..., and Qualifica... The 'Accepted' category is selected in the dropdown. The first row is highlighted in yellow and contains: View, Award Mode, 2..., Accepted, 01/04/2023, 2.

<input type="checkbox"/>	View	Award Mode	ID	Category	Categori...	Qualifica...
<input type="checkbox"/>			<input type="checkbox"/>	Accepted		
<input checked="" type="checkbox"/>	View	Award Mode	2...	Accepted	01/04/2023	2

2. Scroll to the bottom of the page and click on *Act on Selected* and click *Categorize*.



3. Enter the same Category as the existing award. (In this example, the award was in the Accepted Category).



The screenshot shows a dialog box titled 'Categorize Selected' with the following fields and sections:

- Choose a Category: Accepted
- Update Amount: 2500
- Award Period: 2324\_FALL\_ONLY
- Initial Opportunity Fund Information table:
- Award Information table:
- Categorize button

Initial Opportunity Fund Information		Award Information	
Academic Year 2023 - 2024	\$0.00	Fund Period Awards	0
Committed Amount	(\$90,000.00)	Committed Awards	(18)
Total Remaining Amount	(\$90,000.00)	Total Remaining Awards	-18

4. Update the Amount to the fall only amount which is \$2,500.

(In some situations, your department may approve of awarding the student the full fall/spring award amount, even if they do not attend spring. In this situation, you may enter the full \$5,000.)

Categorize Selected

Choose a Category  
Accepted

Update Amount  
2500

Award Period  
2324\_FALL\_ONLY

Initial Opportunity Fund Information		Award Information	
Academic Year 2023 - 2024	\$0.00	Fund Period Awards	0
Committed Amount	(\$90,000.00)	Committed Awards	(18)
Total Remaining Amount	(\$90,000.00)	Total Remaining Awards	-18

Categorize

5. Select the fall only award period for the correct Academic Year.

In this case, we will select 2324\_FALL\_ONLY, then select *Categorize*.

Categorize Selected

Choose a Category  
Accepted

Update Amount  
2500

Award Period  
2324\_FALL\_ONLY

Initial Opportunity Fund Information		Award Information	
Academic Year 2023 - 2024	\$0.00	Fund Period Awards	0
Committed Amount	(\$90,000.00)	Committed Awards	(18)
Total Remaining Amount	(\$90,000.00)	Total Remaining Awards	-18

Categorize

# Approving Post-Acceptance Applications

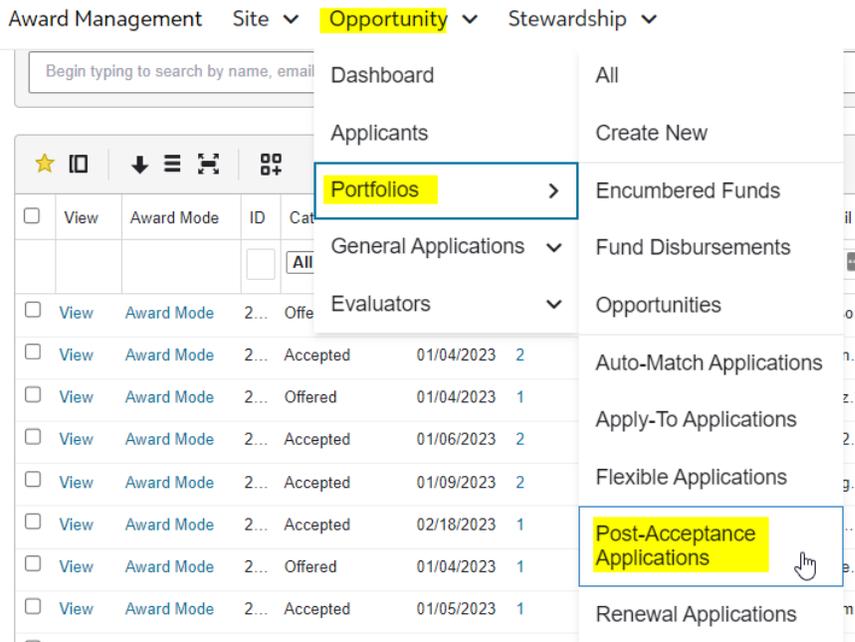
## What is Post-Acceptance?

Post-acceptance generally refers to the student’s submission of a thank you letter. Post-acceptance may also include the upload of a photo, or acknowledgement of terms and conditions of the scholarship (such as remaining in an eligible major or enrolling in a minimum number of hours).

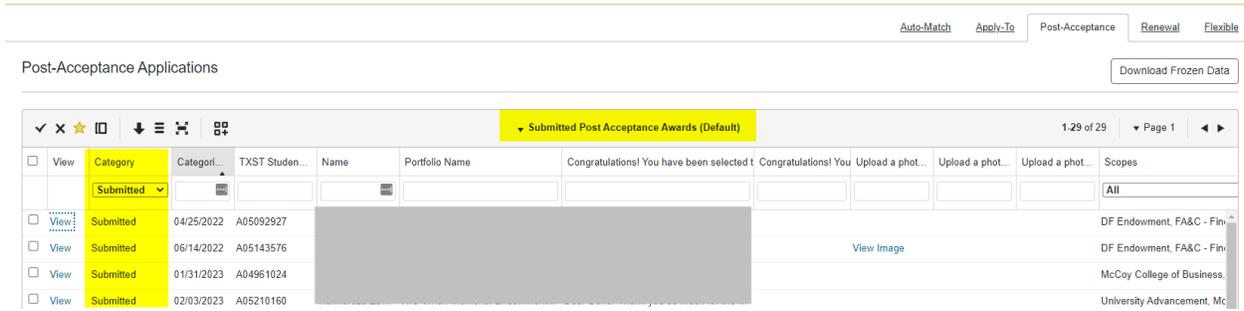
Before funds are awarded and disbursed to students, any scholarship with an outstanding thank you letter requirement must be manually approved by an Opportunity Administrator in your department.

## Reviewing Post-Acceptance

1. Navigate to the “Post-Acceptance Applications” grid by clicking *Opportunity>Portfolios>Post-Acceptance Applications*.



2. The default view will be only Submitted Post-Acceptance, as seen below.



Post-Acceptance Applications

Auto-Match Apply-To Post-Acceptance Renewal Flexible

Download Frozen Data

Submitted Post Acceptance Awards (Default) 1.29 of 29 Page 1

View	Category	Category...	TXST Studen...	Name	Portfolio Name	Congratulations! You have been selected t	Congratulations! You	Upload a phot...	Upload a phot...	Upload a phot...	Scopes
<input type="checkbox"/>	Submitted										All
<input type="checkbox"/> View	Submitted	04/25/2022	A05092927								DF Endowment, FA&C - Fin...
<input type="checkbox"/> View	Submitted	06/14/2022	A05143576				<a href="#">View Image</a>				DF Endowment, FA&C - Fin...
<input type="checkbox"/> View	Submitted	01/31/2023	A04961024								McCoy College of Business,
<input type="checkbox"/> View	Submitted	02/03/2023	A05210160								University Advancement, Mc...

3. **Steps 3 – 5 are optional.** You may want to create a Dashboard Card to easily access your Submitted Post-Acceptance.

Click the *Create a New Dashboard Card* icon.

Post-Acceptance Applications



4. Name the Dashboard Card and click *Create*.



Create New Dashboard Card

Text

Submitted Thank You Letters

Dashboard Card text may be no longer than 60 characters.

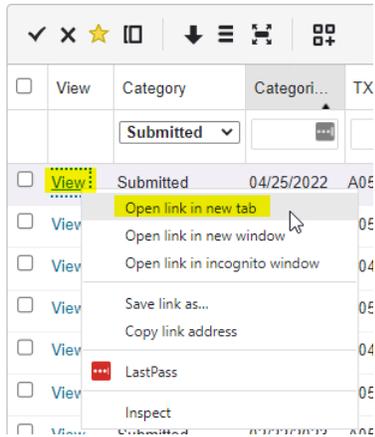
Create

5. You can now click your Dashboard Card to quickly access your Submitted Post-Acceptance Applications.

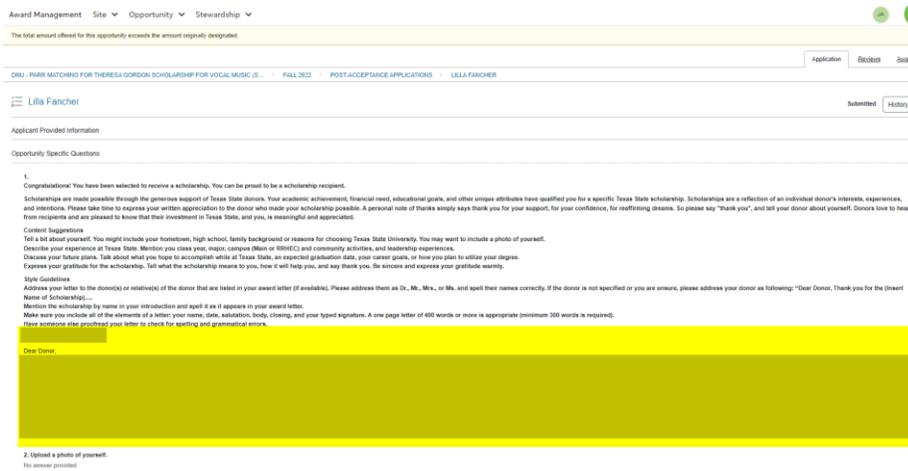


6. To view the Submitted Post-Acceptance, right-click on *View* for a student then *Open link in new tab*.

### Post-Acceptance Applications



7. Review the letter and then close the tab.



## Final Approval of Post-Acceptance

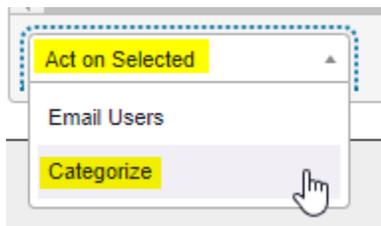
8. Once you have verified that a student's submitted post-acceptance is acceptable, select the student you are ready to award.

[Auto-Match](#) [Apply-To](#) [Post-Acceptance](#) [Renewal](#) [Flexible](#)

Post-Acceptance Applications [Download Frozen Data](#)

<input type="checkbox"/>	View	Category	Categori...	TXST Studen...	Name	Portfolio Name	Congratulations! You have been selected t	Congratulations! You	Upload a phot...	Upload a
<input checked="" type="checkbox"/>	View	Submitted	04/25/2022	A05092927		DNU - Parr Matching for Theresa...				
<input type="checkbox"/>	View	Submitted	06/14/2022	A05143576		DNU - Parr Matching for Theresa...			<a href="#">View Image</a>	

9. Scroll to the bottom of the page and click on *Act on Selected* and click *Categorize*.



10. Select the *Awarded* Category and click *Categorize*.

*You do not need to input anything when the system requests the award period or the semester. That is used only if you'd like to make changes to an award period or amount.*

Categorize Selected ✕

Choose a Category

Update Amount

Award Period

[Categorize](#)

11. If you **do not** approve of the student's thank you letter and would like them to revise, you will need to email the student to notify them to revise and resubmit.

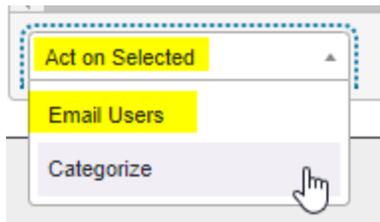
To email the student, select the student on the Post-Acceptance tab.

[Auto-Match](#) [Apply-To](#) **Post-Acceptance** [Renewal](#) [Flexible](#)

Post-Acceptance Applications Download Frozen Data

<input type="checkbox"/>	View	Category	Categori...	TXST Studen...	Name	Portfolio Name	Congratulations! You have been selected t	Congratulations! You	Upload a phot...	Upload a
<input checked="" type="checkbox"/>	View	Submitted	04/25/2022	A05092927		DNU - Parr Matching for Theresa...				
<input type="checkbox"/>	View	Submitted	06/14/2022	A05143576		DNU - Parr Matching for Theresa...			<a href="#">View Image</a>	

12. Select *Act on Selected* and then *Email Users*.



13. If you do not need a response from the student, you may email directly through BOSS. Otherwise, you may choose your personal email so that the student can reply to you.

Enter the email subject, body of your email, then click *Send Emails*.

Email Selected Users

**From**

System (NOREPLY@boss.finaid.txstate.edu)

System (NOREPLY@boss.finaid.txstate.edu)

You (|||@txstate.edu)

**Body**

Example Formatting: **\*bold\***, *\_italics\_*

B / I / [icons] Help Preview Edit

Full Screen [icon]

Send Emails

14. Finally, you will need to change the Post-Acceptance Category to *Requested*. This will enable the student to access the Post-Acceptance task in BOSS so that they can re-submit their letter.

Select the student.

[Auto-Match](#)   [Apply-To](#)   **Post-Acceptance**   [Renewal](#)   [Flexible](#)

---

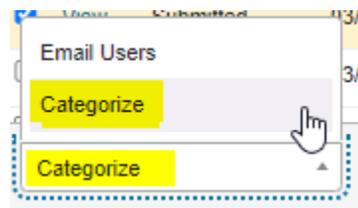
Post-Acceptance Applications [Download Frozen Data](#)

---

Submitted Post Acceptance Awards (Default)
1-29 of 29   Page 1

<input type="checkbox"/>	View	Category	Categori...	TXST Studen...	Name	Portfolio Name	Congratulations! You have been selected t	Congratulations! You	Upload a phot...	Upload a
<input checked="" type="checkbox"/>	<a href="#">View</a>	Submitted	04/25/2022	A05092927		DNU - Parr Matching for Theresa...				
<input type="checkbox"/>	<a href="#">View</a>	Submitted	06/14/2022	A05143576		DNU - Parr Matching for Theresa...			<a href="#">View Image</a>	

15. Select *Categorize* and then *Categorize*.



16. Change the Post-Acceptance status to *Requested* and click *Categorize*.

**Categorize Selected** ✕

**Choose a Category**

Requested

**Update Amount**

Disburse per applicant

**Award Period**

Choose an Award Period

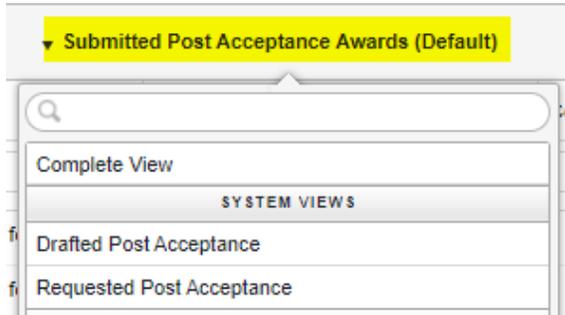
**Categorize**

Bogutski Family Scholarship (SB50) Dear Bogutski family, my name is Richard

## Pending Post-Acceptance - Sending Email Reminders

1. As acceptance deadlines approach, you may want to email students to remind them to accept their scholarship offer and/or submit their thank you letter.

Hover your mouse over Submitted Post Acceptance Awards (Default) and select one of the three views: Pending Post Acceptance, Drafted Post-Acceptance, Requested Post Acceptance.



2. Here is a quick reference explaining the three categories and the message your email will want to convey:

**Pending** Student has not accepted the award offer.  
**Email may be sent to remind the student to accept their scholarship and submit their thank you letter.**

**Requested** Student has accepted the award but has not begun post-acceptance.  
**Email may be sent to remind the student to submit their thank you letter.**

**Drafted** Student has begun writing post-acceptance but has not submitted.  
**Email may be sent to remind the student to submit their thank you letter.**

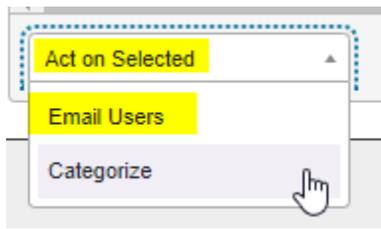
3. You may send a mass email by selecting *all students* where highlighted below.

Auto-Match   Apply To   Post-Acceptance   Renewal   Flexible

Post-Acceptance Applications Download Frozen Data

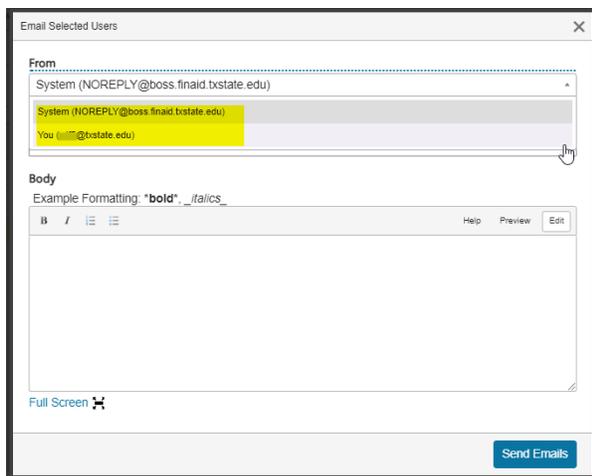
★	ID	Category	Categori...	Qualifica...	Name	Primary Email	Email Aliases	UID	Award Period	Amount	Opportu...	Portfolio Name	Scopes	Season	Start At	End At
<input checked="" type="checkbox"/>	View	2...	Drafted	03/02/2023	1				2223_SPR_O...	\$2,000.00	8521	Jessie Helen H...	University Advance...	Fall 2021	11/01/2021	02/2...
<input checked="" type="checkbox"/>	View	2...	Drafted	02/28/2023	1				2223_FALL_O...	\$440.00	12053	Susan Dudolsk...	FAS View, Housing...	Fall 2022	11/09/2022	12/3
<input checked="" type="checkbox"/>	View	2...	Drafted	02/28/2023	1				2324_FALL_SPR	\$4,000.00	10741	Ingram Engine...	DF Endowment, Fin...	Fall 2023	08/01/2022	12/2
<input checked="" type="checkbox"/>	View	2...	Drafted	02/25/2023	1				2223_SPR_O...	\$2,000.00	9861	McCoy Fellows...	McCoy College of B...	Fall 2021	11/01/2021	02/0
<input checked="" type="checkbox"/>	View	2...	Drafted	02/22/2023	1				2223_SPR_O...	\$1,000.00	7735	Lawrence E. a...	DF Endowment, Mc...	Fall 2021	11/01/2021	02/0
<input checked="" type="checkbox"/>	View	2...	Drafted	02/22/2023	1				2223_SPR_O...	\$3,175.00	7693	Farm Credit Ba...	McCoy College of B...	Fall 2021	11/01/2021	02/0
<input checked="" type="checkbox"/>	View	2...	Drafted	02/22/2023	1				2223_SPR_O...	\$750.00	9221	Brian Wong En...	McCoy College of B...	Fall 2021	11/01/2021	02/0
<input checked="" type="checkbox"/>	View	2...	Drafted	02/22/2023	1				2223_SPR_O...	\$750.00	8745	The Faith Scho...	McCoy College of B...	Fall 2021	11/01/2021	02/0
<input checked="" type="checkbox"/>	View	2...	Drafted	02/20/2023	1				2223_SPR_O...	\$2,000.00	8511	McCoy College...	McCoy College of B...	Fall 2021	11/01/2021	02/0
<input checked="" type="checkbox"/>	View	2...	Drafted	01/04/2023	2				2324_FALL_SPR	\$5,000.00	10331	Patti Strickel H...	DF Endowment, Fin...	Fall 2023	08/01/2022	12/2

4. Select *Act on Selected* and then *Email Users*.



5. If you do not need a response from the student, you may email directly through BOSS. Otherwise, you may choose your personal email so that the student can reply to you.

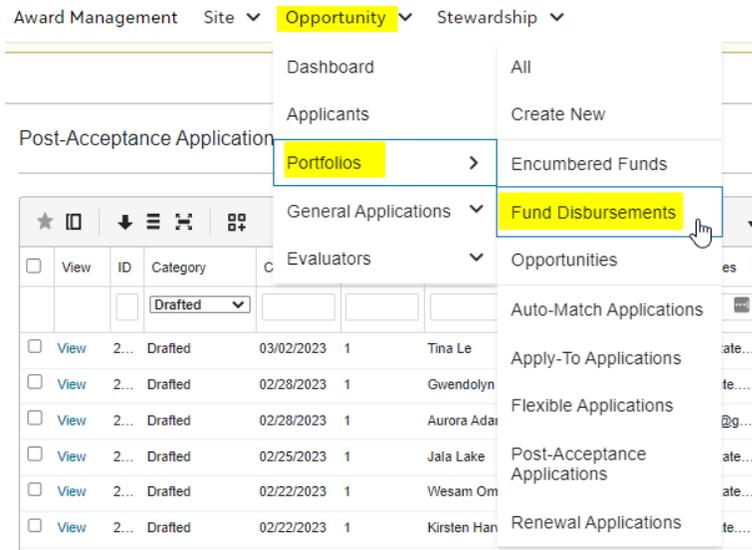
Enter the email subject, body of your email, then click *Send Emails*.



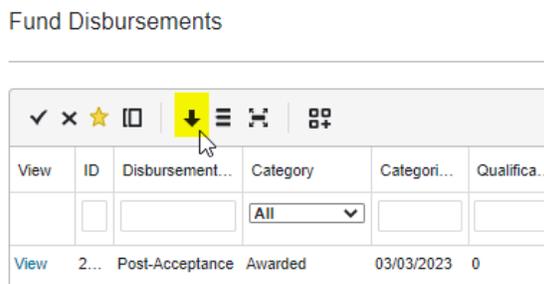
# Disbursement Reports

This report allows you to see all Disbursed Awards for a given academic year to assist in compliance and end of year statistics.

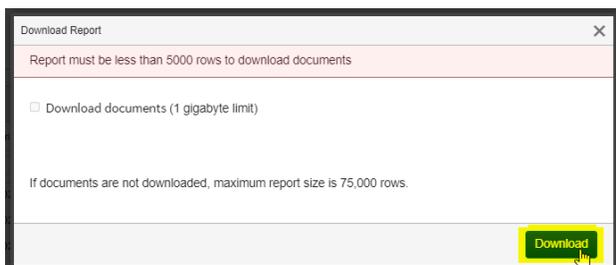
1. To download a Disbursement Report, click *Opportunity>Portfolios>Fund Disbursements*.



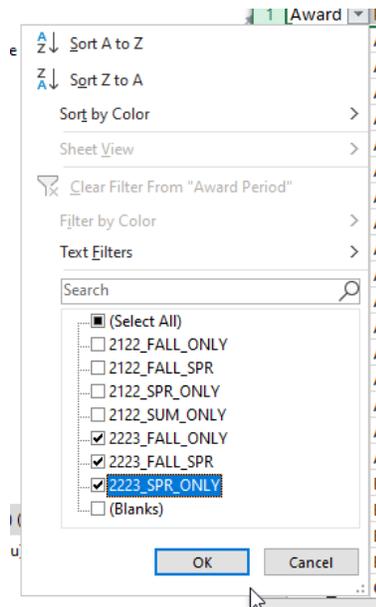
2. Click the download icon.



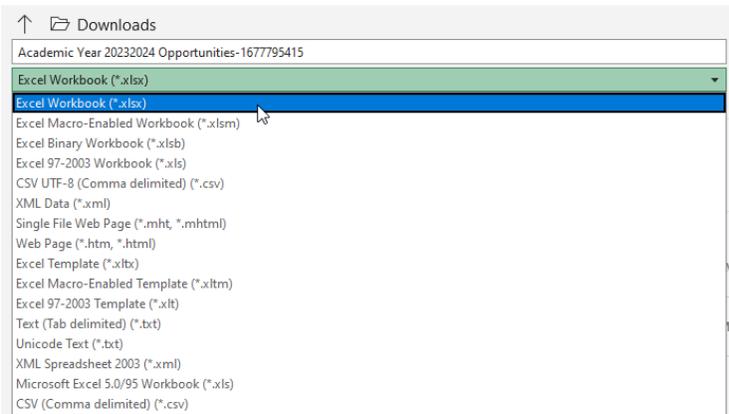
3. Click *Download*.



4. Sort and filter as needed.

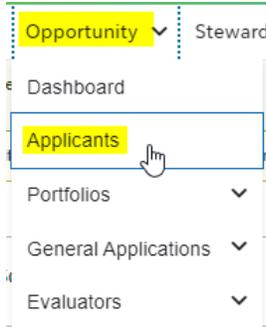


5. Make sure to save as an Excel Workbook. If you leave the file as a CSV file type, your edits to the spreadsheet will not be saved.

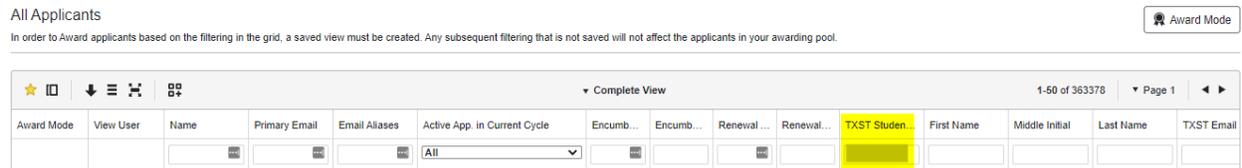


# Viewing Log of Emails Sent to Student

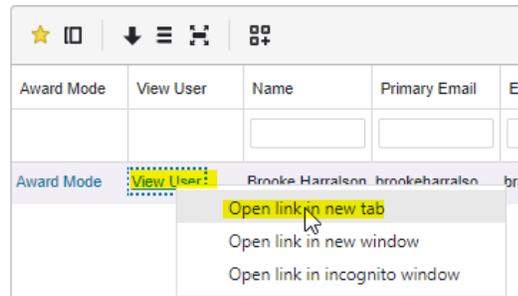
1. To view the correspondence that was sent to students, click Opportunity>Applicants.



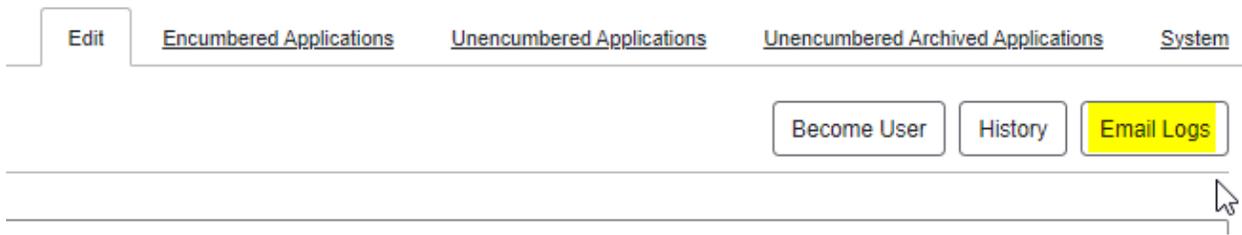
2. Enter the Student ID number and hit Enter.



3. Select *View User* and *Open link in new tab*.



4. Click *Email Logs*.



## Other Notes

Below are some other useful things to keep in mind regarding BOSS functionality.

### Endowment and SAP Information

1. When your BOSS account was set up, it was linked to a specific SAP account. If your SAP account changes, please let us know before making offers so that the new awards do not pull from the old SAP account. You will need to complete the Banner Fund Form to have the SAP information updated.
2. If your endowment has accrued interest and needs to be added to an existing award, please forward correspondence from the University Advancement to Scholarships prior to increasing your awards. We will need to add this additional funding in Banner to ensure that the increased BOSS award can flow to the student's account in Banner.
3. The amounts that you see in BOSS (such as award amounts available) are entered into BOSS based on the Endowment Distribution Report sent to us by University Advancement. These are not live SAP balances. Please ensure you check SAP to confirm funding available.

### Scholarship Awarding Deadlines

Per UPPS 06.01, General Awarding Procedures, the scholarship awarding deadlines are below:

a. Undergraduate Scholarship Awarding Deadlines

- 1) Incoming freshmen students – March 15
- 2) Incoming transfer students – May 1
- 3) Returning students – May 1

b. Graduate and Certificate-Seeking Scholarship Awarding Deadlines

- 1) Incoming students – March 31
- 2) Continuing students --May 1

## BOSS Timeline

Please see [BOSS Timeline](https://www.finaid.txst.edu/forms/BOSS_Timeline.pdf) ([https://www.finaid.txst.edu/forms/BOSS\\_Timeline.pdf](https://www.finaid.txst.edu/forms/BOSS_Timeline.pdf)) which outlines important dates from the beginning to the end of the scholarship cycle.

## Disbursements to Students

1. Scholarship funds will disburse to students 10 days before the first class day each semester. The thank you letter must be approved and the Category in BOSS for the Post-Acceptance must be updated to Awarded.
2. Scholarship funds will first credit a student's existing balance. Once the balance is paid in full, any remaining funds will be refunded to the student by the Student Business Services office. Refunds will be processed weekly by SBS on Wednesdays. If a student has Direct Deposit set up with SBS, they should see their refund in the bank account by the following Monday. If the student does not have Direct Deposit set up with SBS, SBS will mail a check to the student and may be received in 10 to 14 days.
3. If a student does not meet the disbursement criteria for the scholarship (such as minimum number of enrolled hours), the funds may not disburse. Your department may approve of an override to the disbursement rule. For example, if spring is a student's final semester before graduation, the department may approve of a student enrolling less than full time. Please let the Scholarships office know if a student is approved for an override of the disbursement rule.

## Contact

*For technical questions regarding set-up of BOSS accounts troubleshooting, or changes to your scholarship, please email [BOSSscholarships@txstate.edu](mailto:BOSSscholarships@txstate.edu) or contact:*

### **Ray Gonzalez**

System Analyst

Direct Line: (512) 245-3193

*For general BOSS and scholarship questions, please email [Scholarships@txstate.edu](mailto:Scholarships@txstate.edu) or contact:*

### **Stephanie Lopez**

Associate Director in Scholarships

Direct Line: (512) 245-7728

### **Jamie Leonard**

Senior Scholarship Program Specialist

Direct Line: (512) 245-2745

### **Sophia Capps**

Scholarship Program Specialist

Direct Line: (512) 245-7918

### **Katherine Odam**

Scholarship Program Specialist

Direct Line: (512) 245-3193

*For student questions, please direct students to the Financial Aid and Scholarships Customer Service team at (512) 245-2315 or [FinancialAid@txstate.edu](mailto:FinancialAid@txstate.edu).*