BOSS Awarding Handbook

Table of Contents

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

Logging into BOSS **4**

Dashboard **5**

Viewing All Scholarship Opportunities **6**

Key Information - All Scholarship Opportunities 6

Creating a Dashboard Card - All Scholarship Opportunities 7

Downloading a Report - All Scholarship Opportunities 9

Locating Specific Scholarship Opportunities **10**

Scholarship Opportunity Information 12

Scholarship Details 12

Questions Tab 14

Qualifications Tab 15

Applications Tab 15

Communications Tab 16

Reviews Tab 16

Post-Acceptance Tab 17

Awarding Procedures **18**

Revising Offer Correspondence 18

Determining Qualified Applicants 20

Create Your Own View 21

Making a Scholarship Offer 23

Selecting the Correct Award Period 24

Adjusting Existing Awards **25**

Increasing an Existing Award 25

Cancelling a Full Award 27

Cancelling a Partial Award 28

Approving Post-Acceptance Applications **31**

What is Post-Acceptance? 31

Reviewing Post-Acceptance 31

Final Approval of Post-Acceptance 34

Pending Post-Acceptance - Sending Email Reminders 37

Disbursement Reports **39**

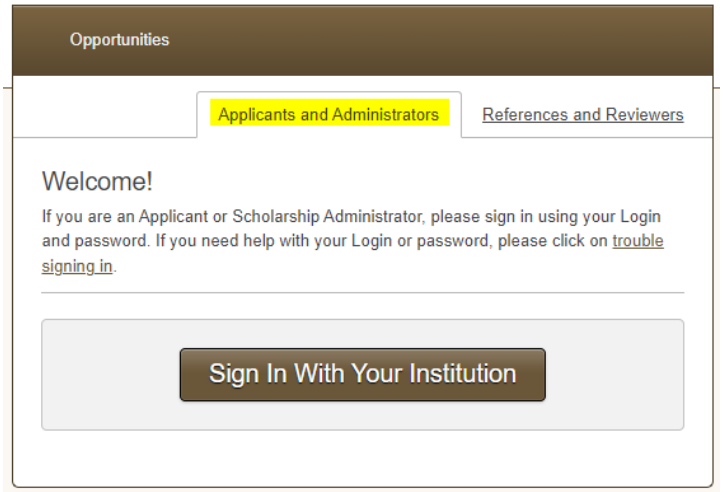
Viewing Log of Emails Sent to Student **41**

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

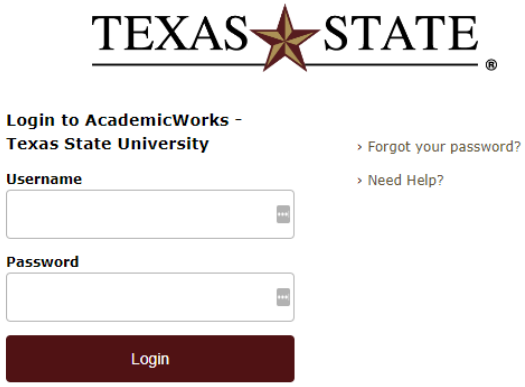
Logging into BOSS

1. Navigate to boss.txstate.edu.

2. Under the *Applicants and Administrators* tab, click *Sign In With Your Institution*.

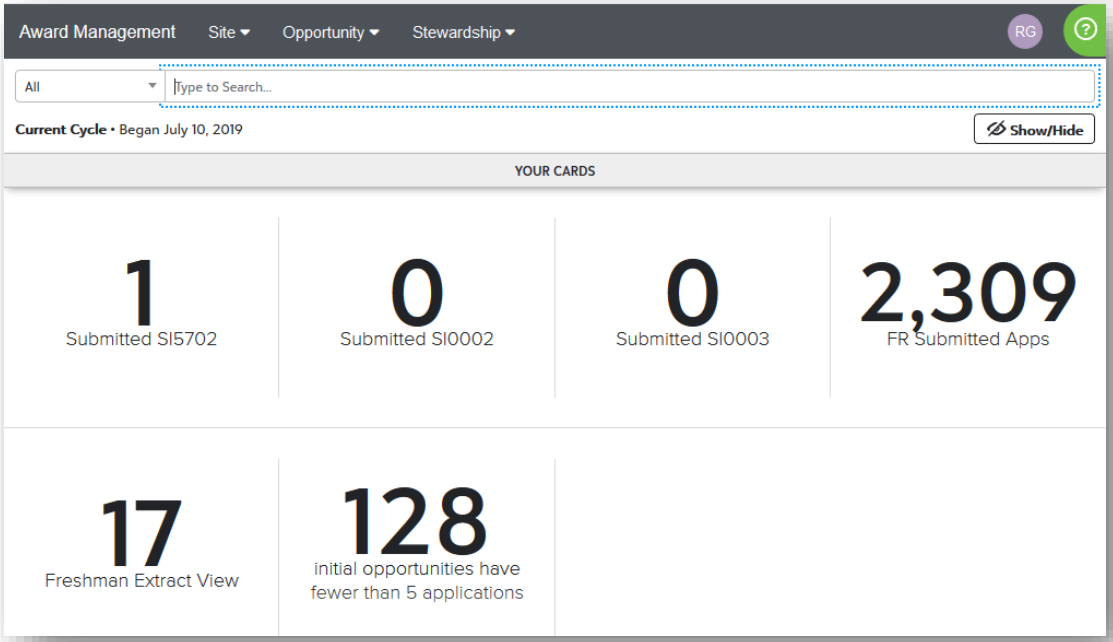


3. Log in using your Net ID and password. Do not use an alias email if you have one.



Dashboard

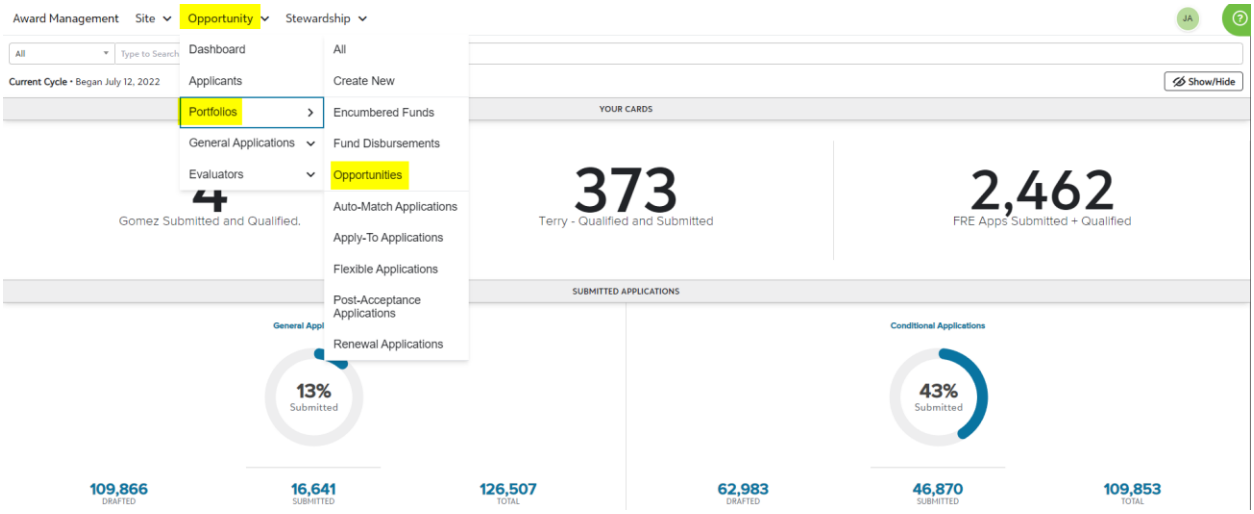
The BOSS landing page is referred to as your **Dashboard**. The **Your Cards** section is a tool that allows you to create custom **Dashboard Cards** to display up-to-date information about your scholarships. Dashboard Cards may be created in various pages through BOSS and will be addressed later in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



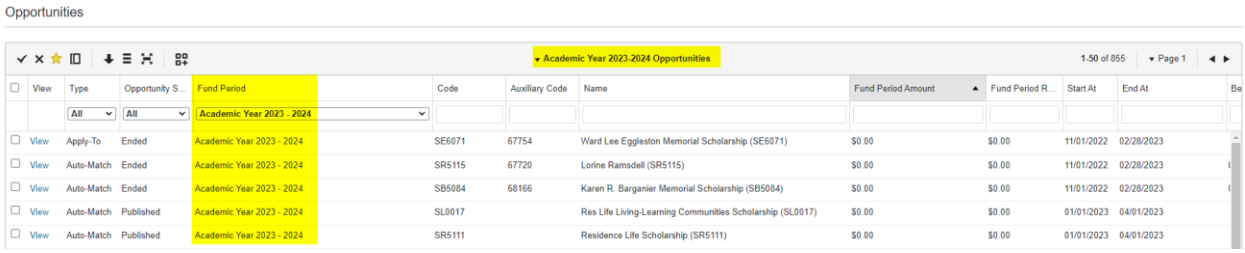
All other information on the Dashboard is static and provides you with general information about your scholarships.

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.



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.

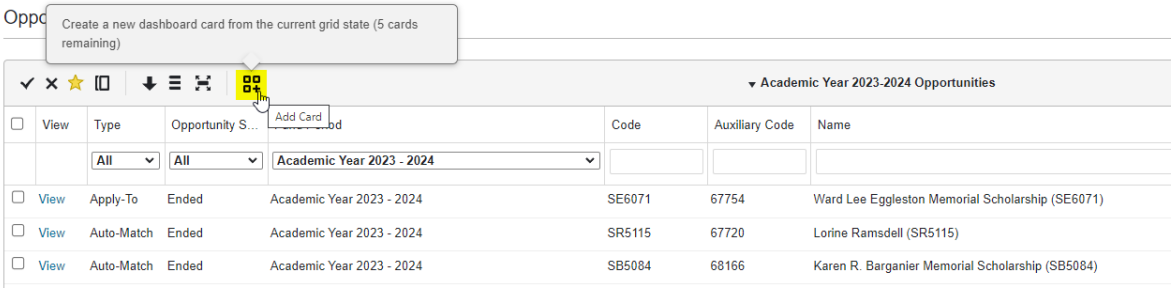
Start At and **End At** dates indicate when the application is open for students to apply.

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

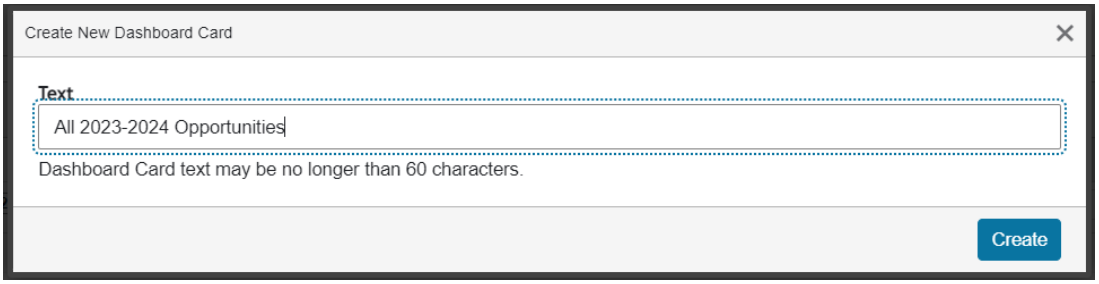
Qualified Applicants refers to the number of applications that have been submitted that meet the eligibility criteria for the scholarship.

Creating a Dashboard Card - All Scholarship Opportunities

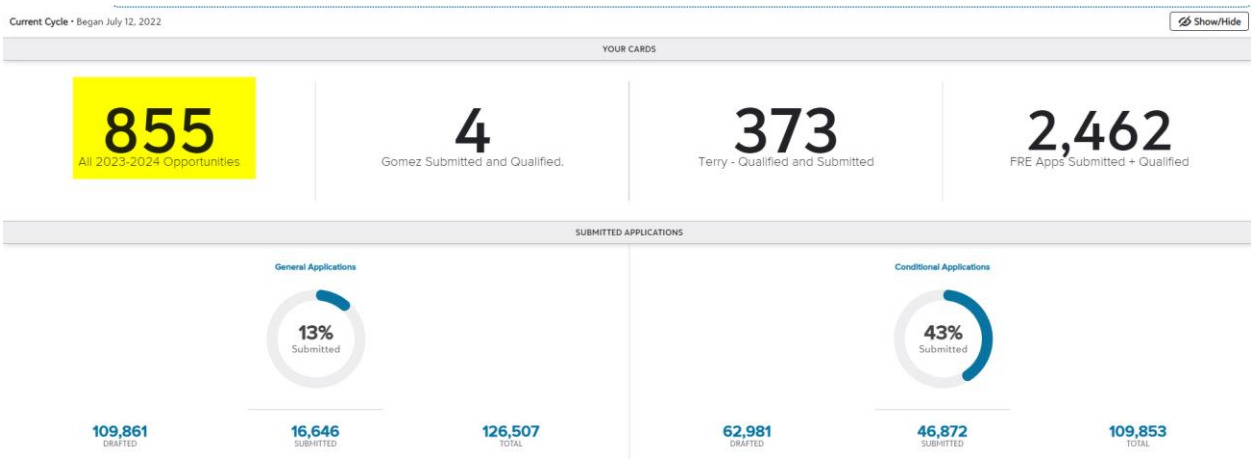
1. To create a Dashboard Card for your 2023-2024 Opportunities, click the *Add Card* icon.



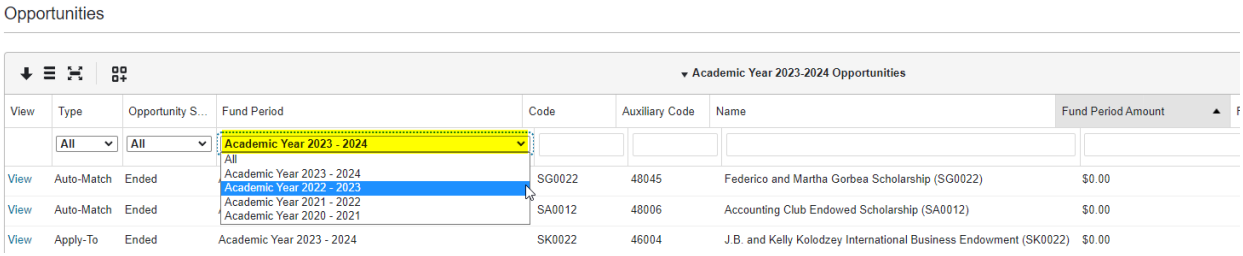
2. Name the Dashboard Card and click *Create*.



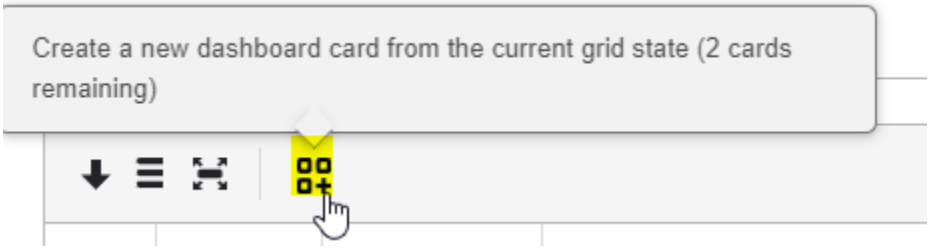
3. Your Dashboard Card is now created.



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.

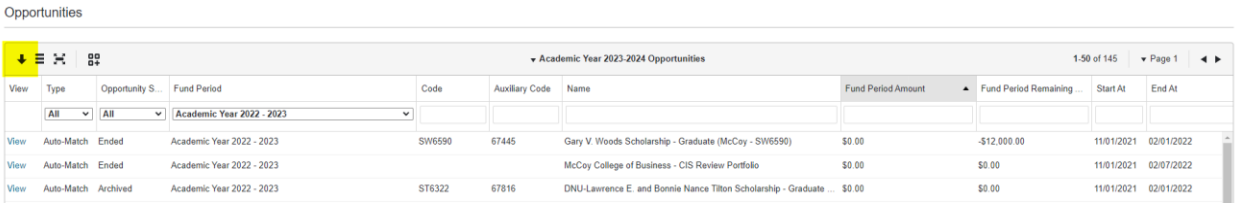


5. Click the Add Card icon.

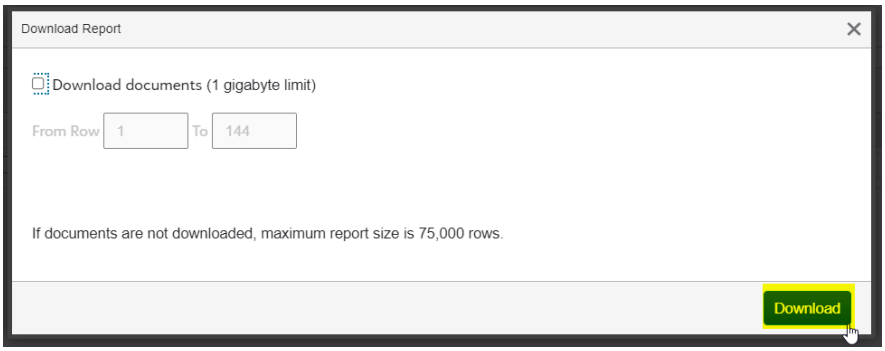


Downloading a Report - All Scholarship Opportunities

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

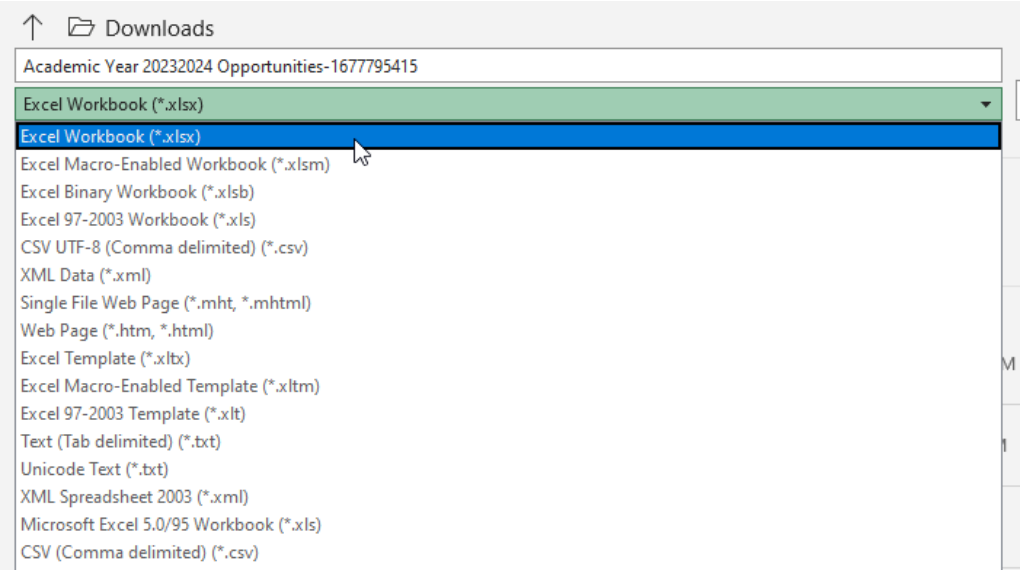


2. Click Download.



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.

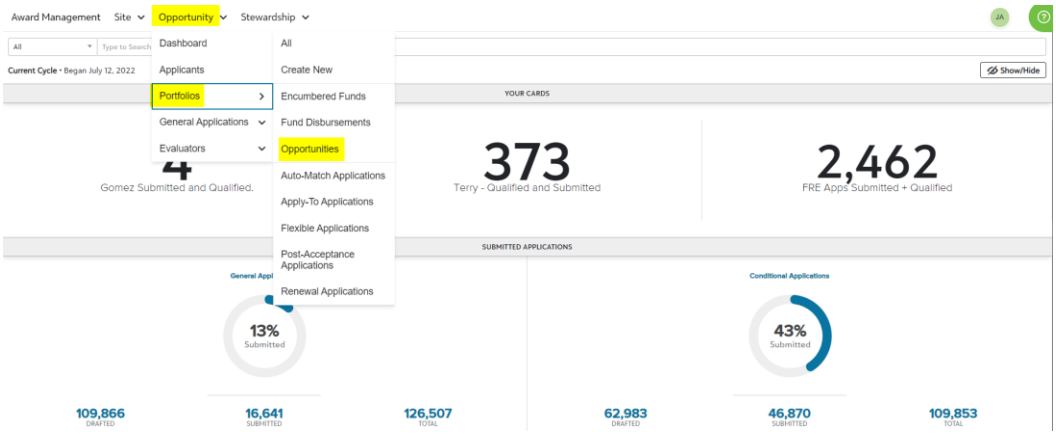


Locating Specific Scholarship Opportunities

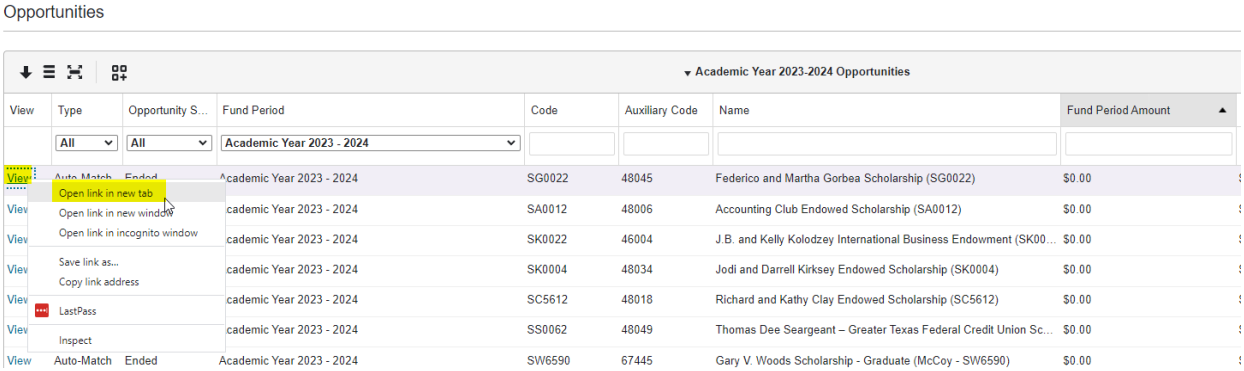
There are two ways to view your specific scholarship opportunities.

Option 1

1. Click *Opportunity* > *Portfolios* > *Opportunities.*

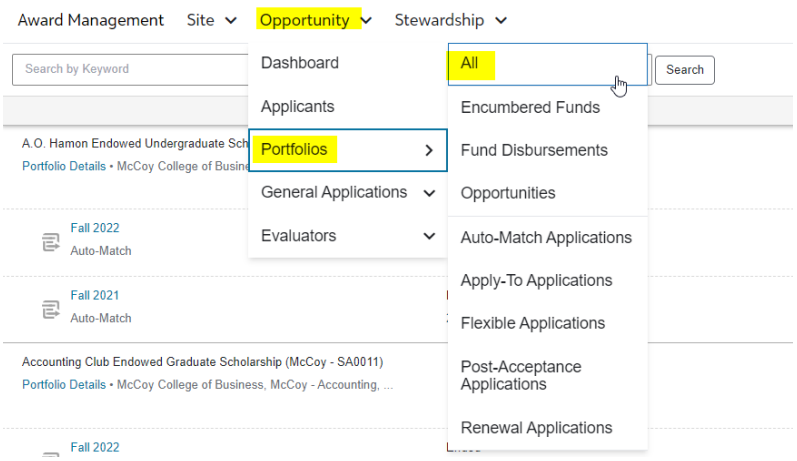


2. Right click *View* next to the specific Opportunity and then *Open link in new tab*.



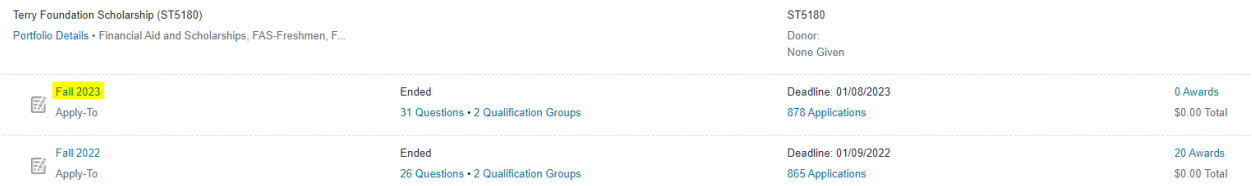
Option 2

1. Click *Opportunity* > *Portfolios* > *All.*



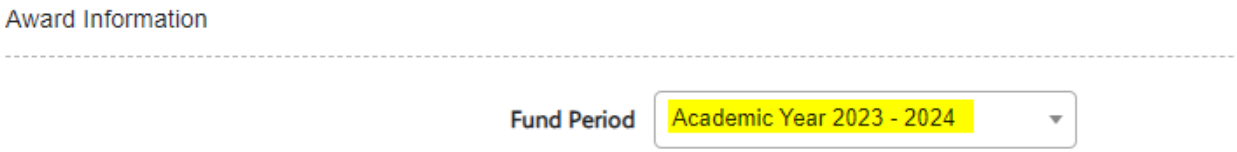
2. Scroll to the specific Opportunity or search by keyword or Banner Fund Number.

3. Click the relevant *Season Stamp*.



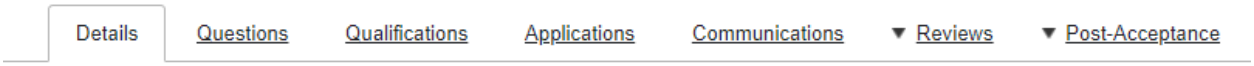
Two opportunities will always be viewable in BOSS. A trick to selecting the correct opportunity is to look at the *Deadline* for guidance. If you are awarding for the upcoming academic year, you wil likely choose the first opportunity. If you are re-awarding mid-year, you will likely use the second opportunity.

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

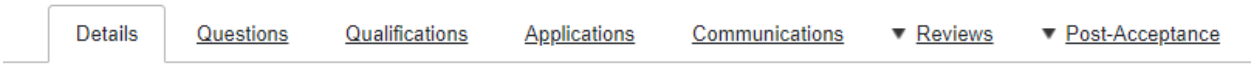


Scholarship Opportunity Information

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



Scholarship Details



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:

<u>Financial Information</u>

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.

<u>Opportunity Specific Information</u>

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

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

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 to have dates added.

Award Information

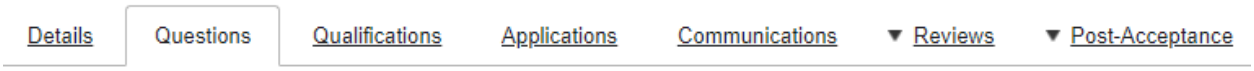
Award Information

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

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

Fund Period Amount is the original amount available to award.

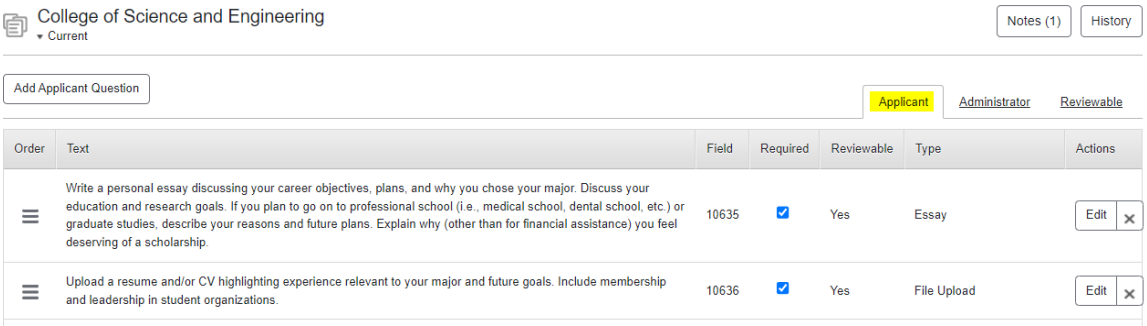
Questions Tab



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

Example:

<u>Applicant Tab</u>



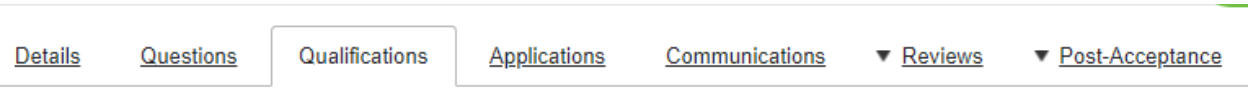
The two questions above are required for this scholarship.

<u>Reviewer Tab</u>

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

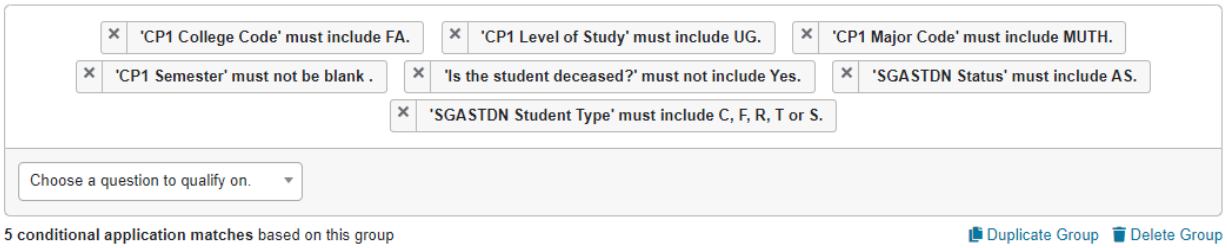
Your department may choose to hide information and only display information that is relevant to the scholarship.

Qualifications Tab



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.

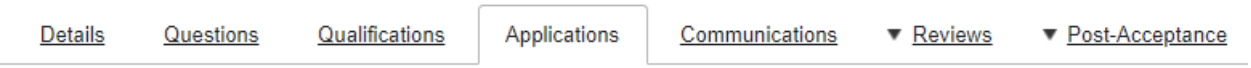
Example:



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.

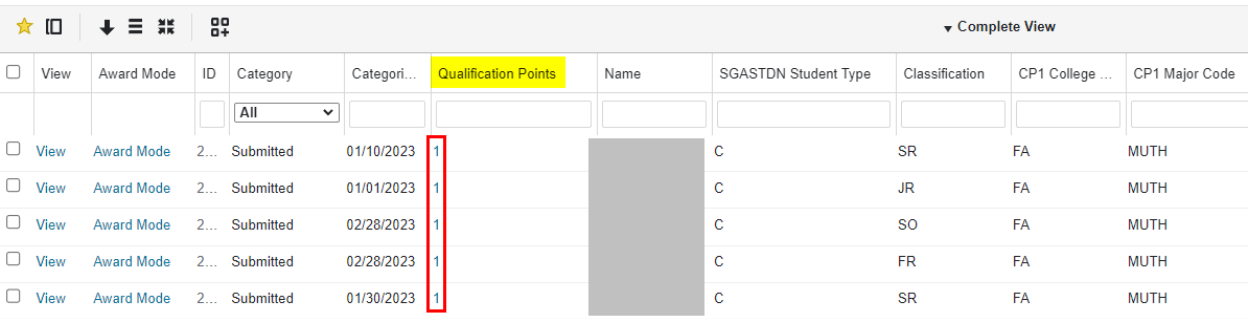
Applications Tab



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

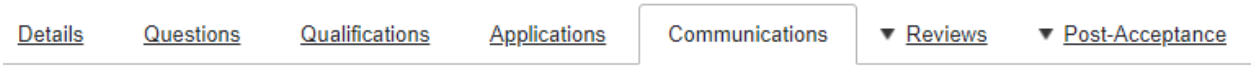
This screen will also tell you whether a student is qualified for a scholarship or not. If a student has any number greater than 0 in the column “Qualification Points,” they meet the eligibility criteria set up for your scholarship.

Example:

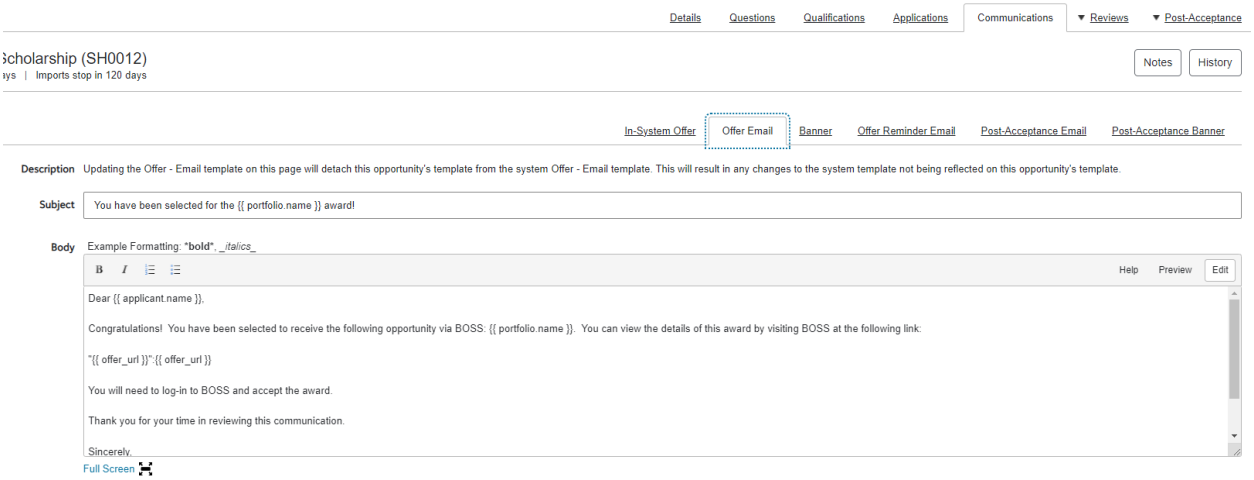


View	Award Mode	ID	Category	Categori...	Qualification Points	Name	SGASTDN Student Type	Classification	CP1 College ...	CP1 Major Code
			All							
View	Award Mode	2...	Submitted	01/10/2023	1		C	SR	FA	MUTH
View	Award Mode	2...	Submitted	01/01/2023	1		C	JR	FA	MUTH
View	Award Mode	2...	Submitted	02/28/2023	1		C	SO	FA	MUTH
View	Award Mode	2...	Submitted	02/28/2023	1		C	FR	FA	MUTH
View	Award Mode	2...	Submitted	01/30/2023	1		C	SR	FA	MUTH

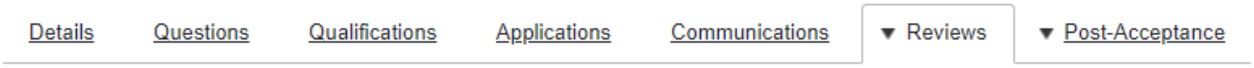
Communications Tab



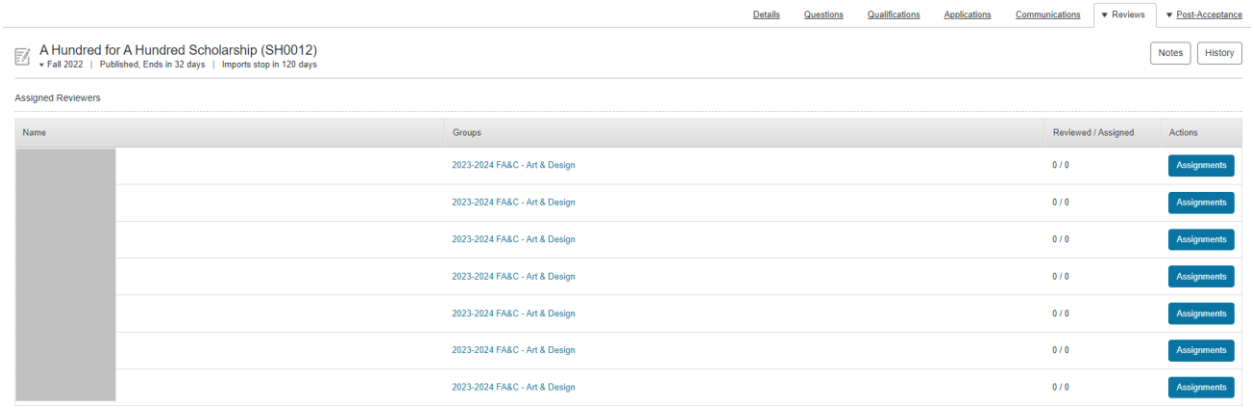
This is where you can customize the communications that are sent to students, such as scholarship offer emails.



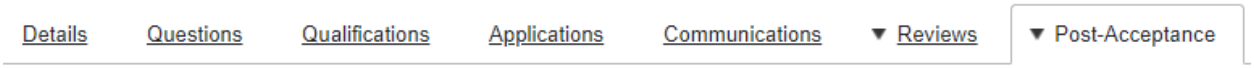
Reviews Tab



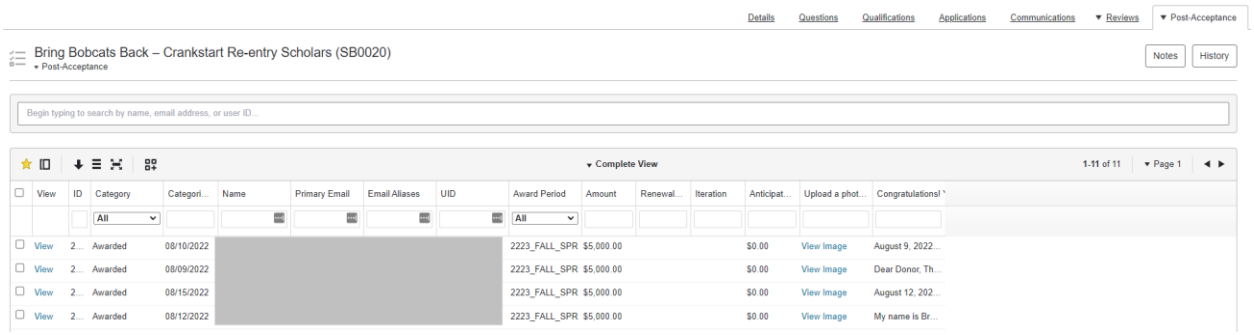
This is where you can see who is on the scholarship review committee, the number of applications they have been assigned to review, and the number of reviews completed.



Post-Acceptance Tab



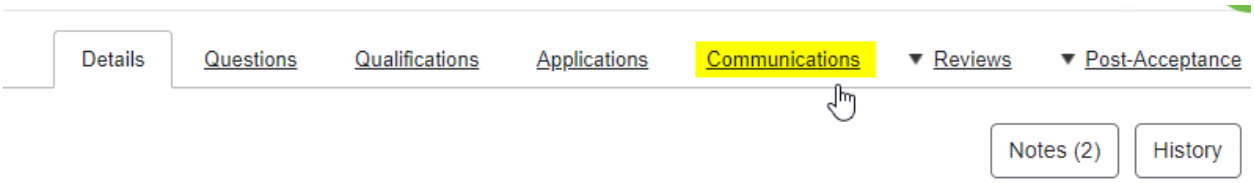
This is where you can view the post-acceptance thank you letters that have been submitted for the specific scholarship opportunity.



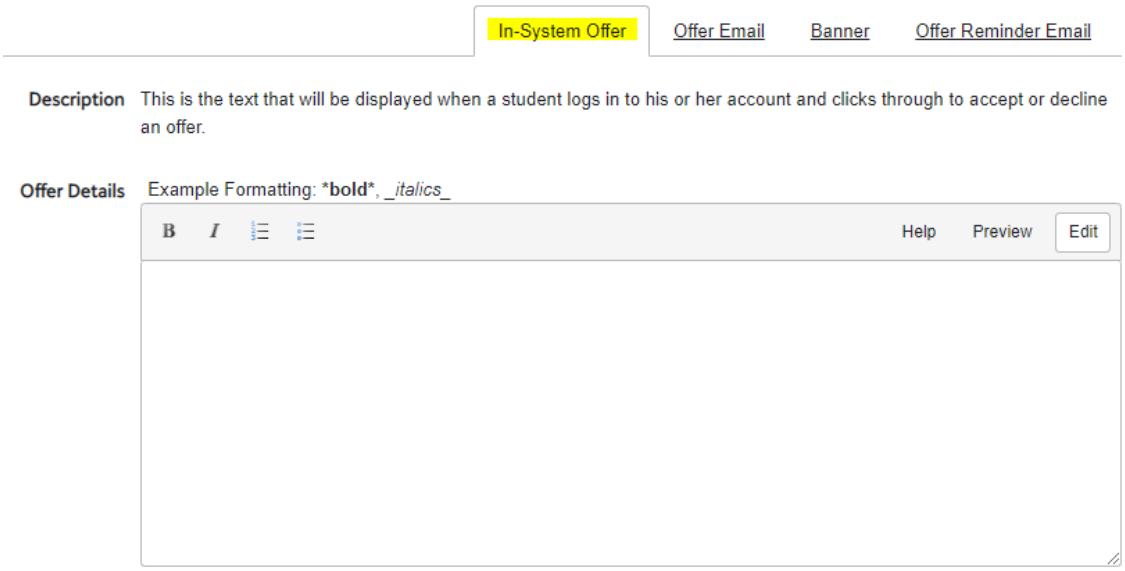
Awarding Procedures

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.

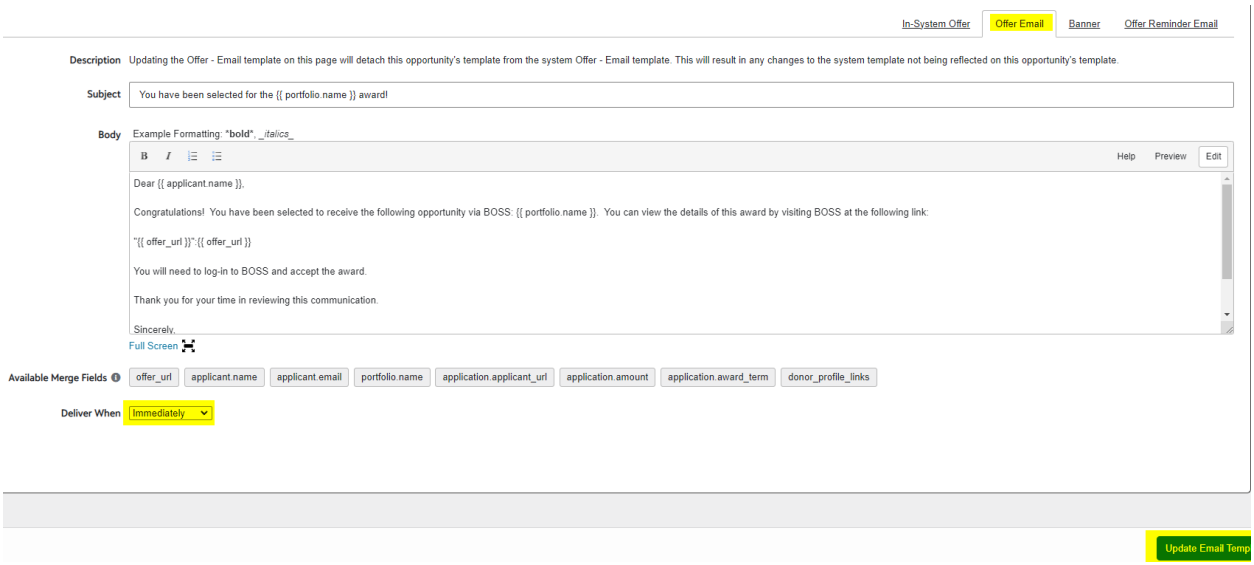


2. **In-System Offer** – This is what the student will see when logging in to BOSS to accept their award. You can enter reminders for the student such as how many hours they must be enrolled in for the funds to disburse, if they must remain in a specific major, or any renewal criteria.



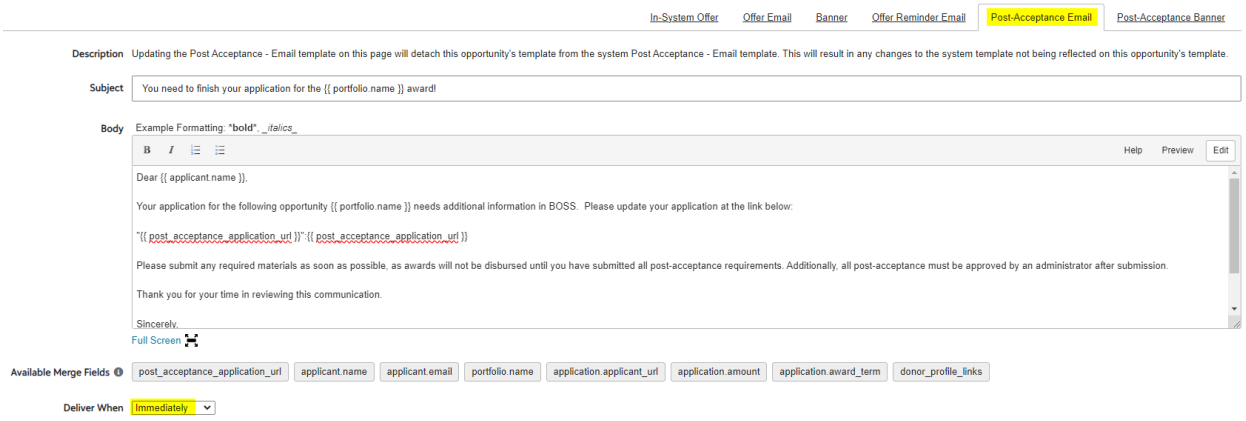
3. **Offer Email** – Below is a sample of the generic offer email that is sent. You may edit this letter to include acceptance deadlines, eligibility criteria, renewal criteria, post-acceptance instructions, etc.

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



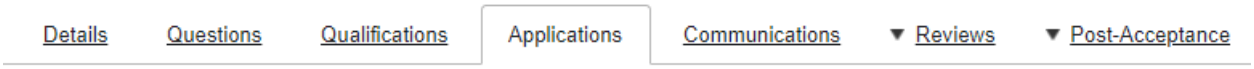
3. **Post-Acceptance Email** – Below is a sample of the generic post-acceptance email that that is sent at the same time as the offer email. You may edit this letter to include post-acceptance instructions.

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

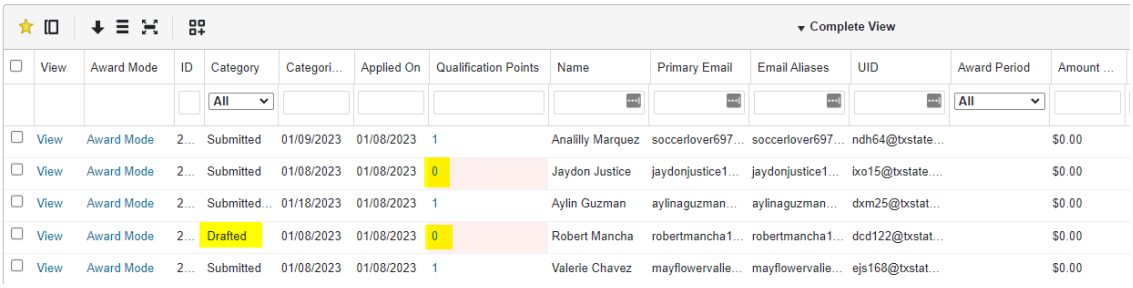


Determining Qualified Applicants

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

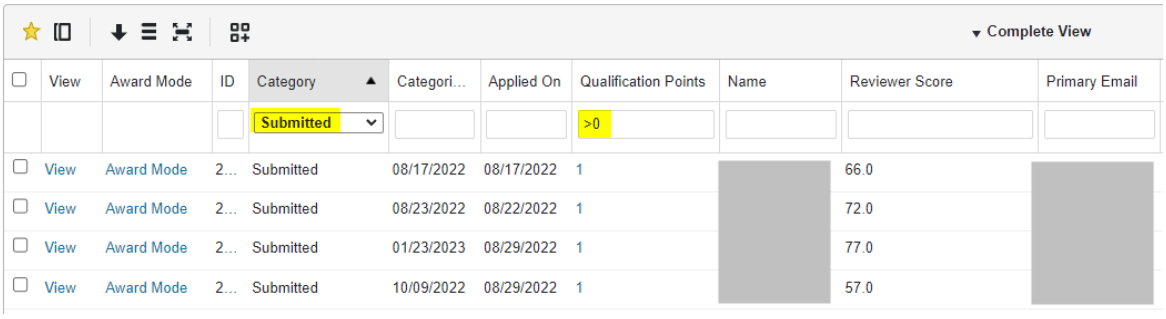


2. Your applicant pool will likely default to the Complete View, which includes applications that are either not qualified (0 Qualification Points) and/or are in Drafted status (the student did not submit their application by the deadline. You will need to filter these students out before making your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



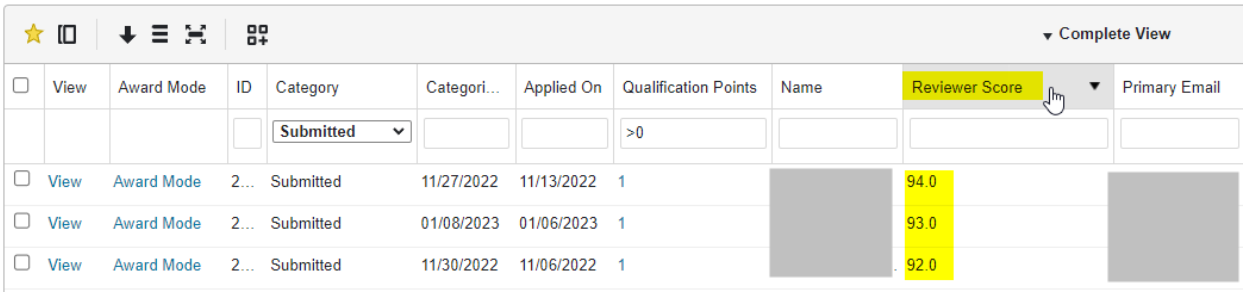
View	Award Mode	ID	Category	Categori...	Applied On	Qualification Points	Name	Primary Email	Email Aliases	UID	Award Period	Amount ...
			All								All	
View	Award Mode	2...	Submitted	01/09/2023	01/08/2023	1	Analilly Marquez	soccerlover697...	soccerlover697...	ndh64@txstate...		$0.00
View	Award Mode	2...	Submitted	01/08/2023	01/08/2023	0	Jaydon Justice	jaydonjustice1...	jaydonjustice1...	ixo15@txstate....		$0.00
View	Award Mode	2...	Submitted...	01/18/2023	01/08/2023	1	Aylin Guzman	aylinaguzman...	aylinaguzman...	dxm25@txstat...		$0.00
View	Award Mode	2...	Drafted	01/08/2023	01/08/2023	0	Robert Mancha	robertmancha1...	robertmancha1...	dcd122@txstat...		$0.00
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*.



View	Award Mode	ID	Category	Categori...	Applied On	Qualification Points	Name	Reviewer Score	Primary Email
			Submitted			>0			
View	Award Mode	2...	Submitted	08/17/2022	08/17/2022	1		66.0	
View	Award Mode	2...	Submitted	08/23/2022	08/22/2022	1		72.0	
View	Award Mode	2...	Submitted	01/23/2023	08/29/2022	1		77.0	
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.

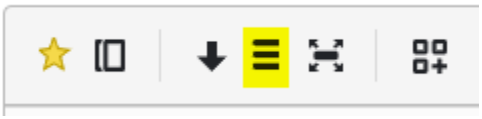


View	Award Mode	ID	Category	Categori...	Applied On	Qualification Points	Name	Reviewer Score	Primary Email
			Submitted			>0			
View	Award Mode	2...	Submitted	11/27/2022	11/13/2022	1		94.0	
View	Award Mode	2...	Submitted	01/08/2023	01/06/2023	1		93.0	
View	Award Mode	2...	Submitted	11/30/2022	11/06/2022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

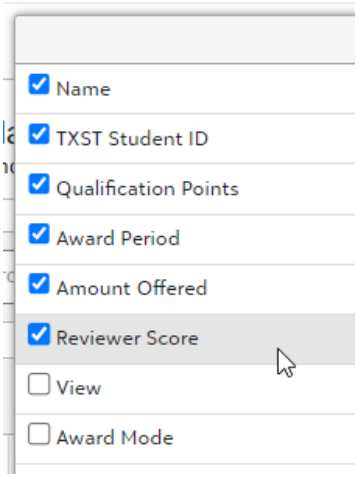
Create Your Own View

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.

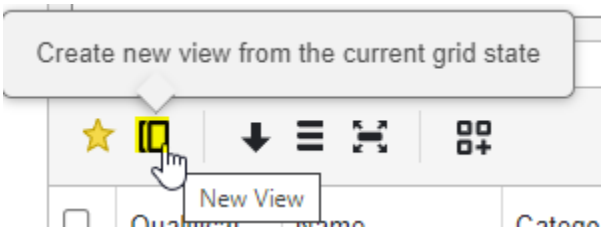


6. Select only the columns you wish to view. At minimum, be sure to include the columns below. You may also wish to include academic data (such as major and GPA) and applicant data (responses to application questions).

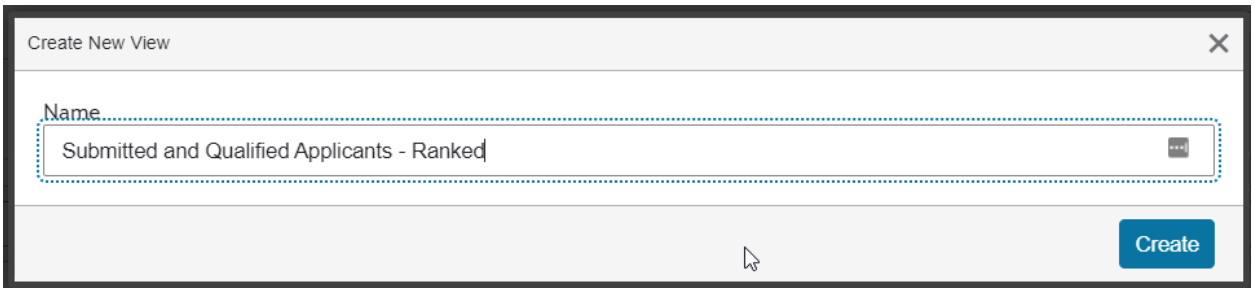


7. You can then rearrange the order of your columns by clicking on the column header and dragging.

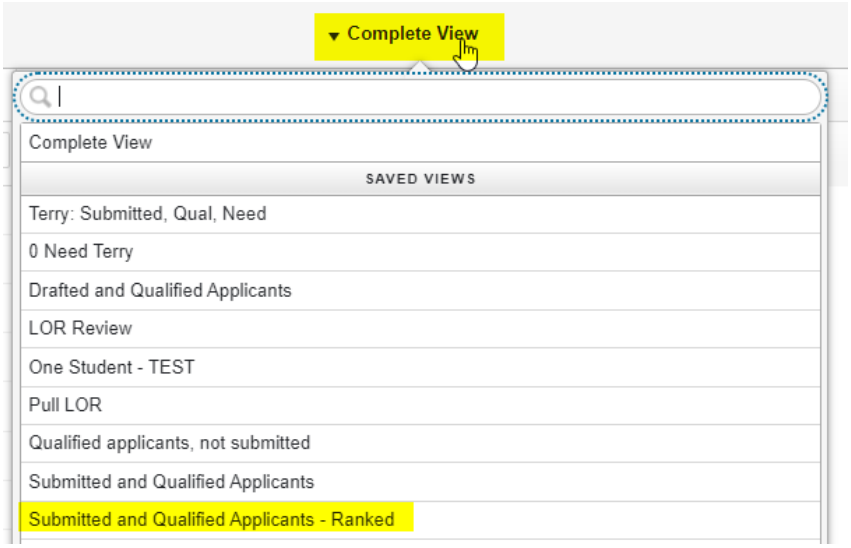
8. After formatting your data, make sure to create the new view by clicking the *New View* icon.



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



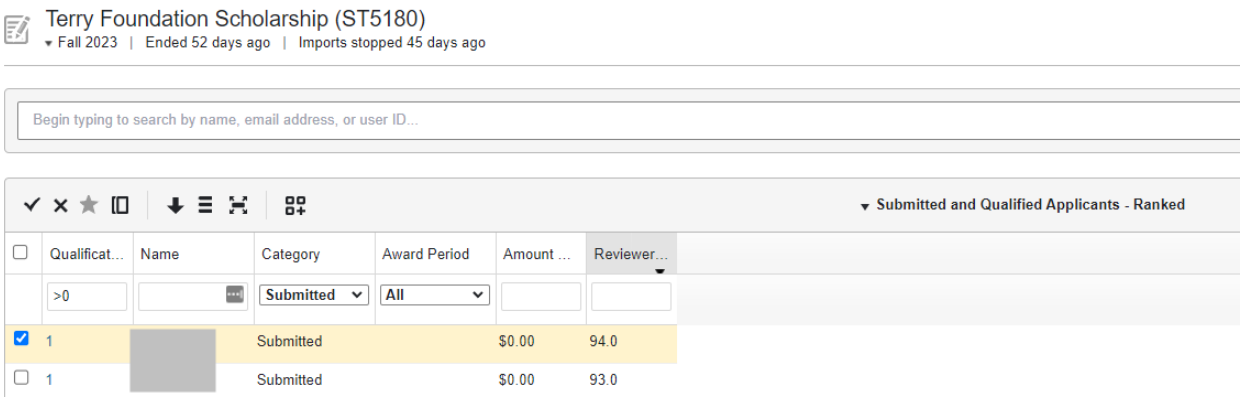
10. You can now click Complete View to toggle between your saved views.



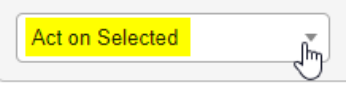
Making a Scholarship Offer

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

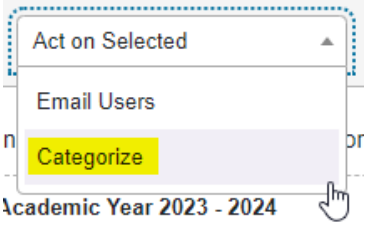
Multiple students may be offered at the same time only if they will all be receiving the <u>same amount</u> for the <u>same award period</u>. A spreadsheet tool is available if your department does mass awarding. Please contact the Scholarships office if this may be relevant for your purposes.



2. Scroll down to *Act on Selected.*



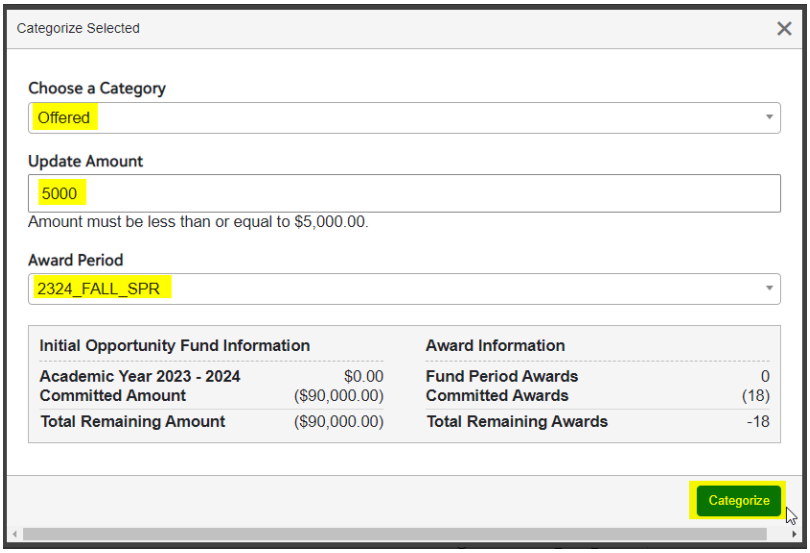
3. Choose *Categorize*.



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.



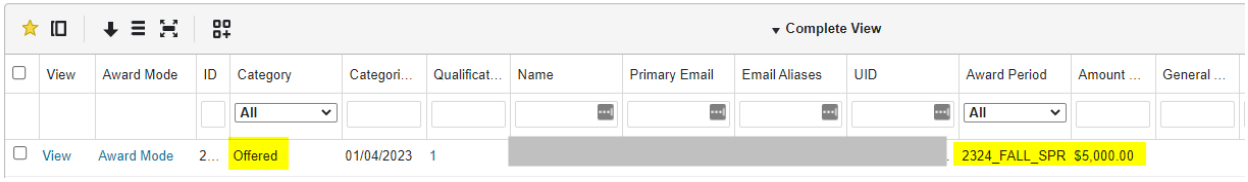
Selecting the Correct Award Period

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.

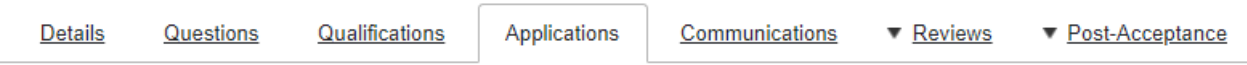
Please reach out to the Scholarships office if you are unsure about which Award Period to choose.

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.



Adjusting Existing Awards

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

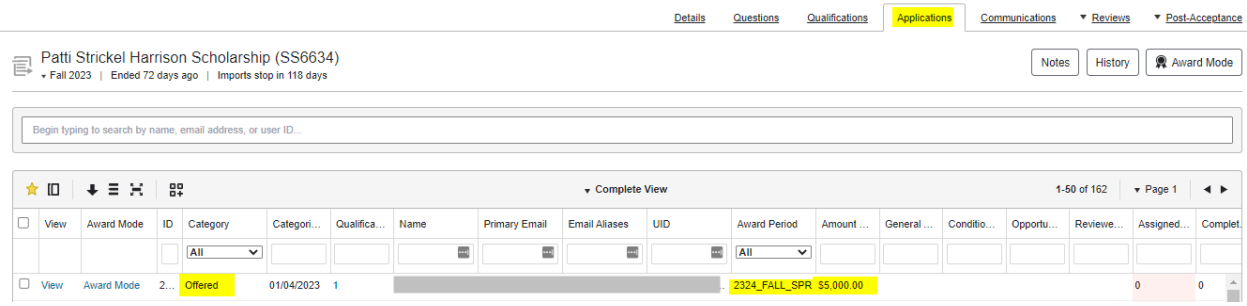


Prior to making any adjustments, make note of the **Category** of the existing award. It's important to *use the <u>same</u> Category as the existing award when making an adjustment*.

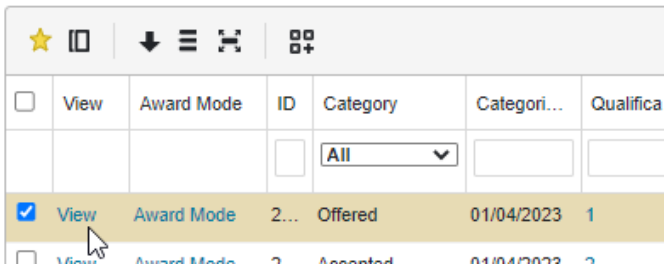
Increasing an Existing Award

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

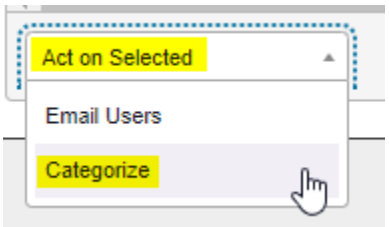
Example: *You would like to award an additional $200.*



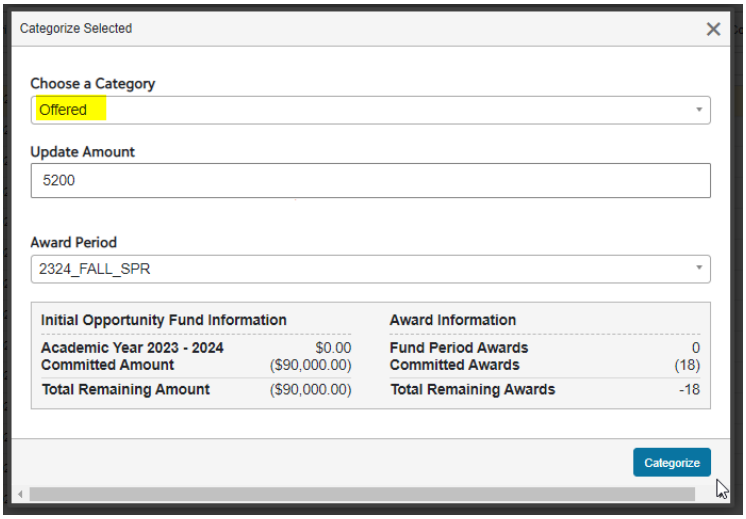
2. Select the student.



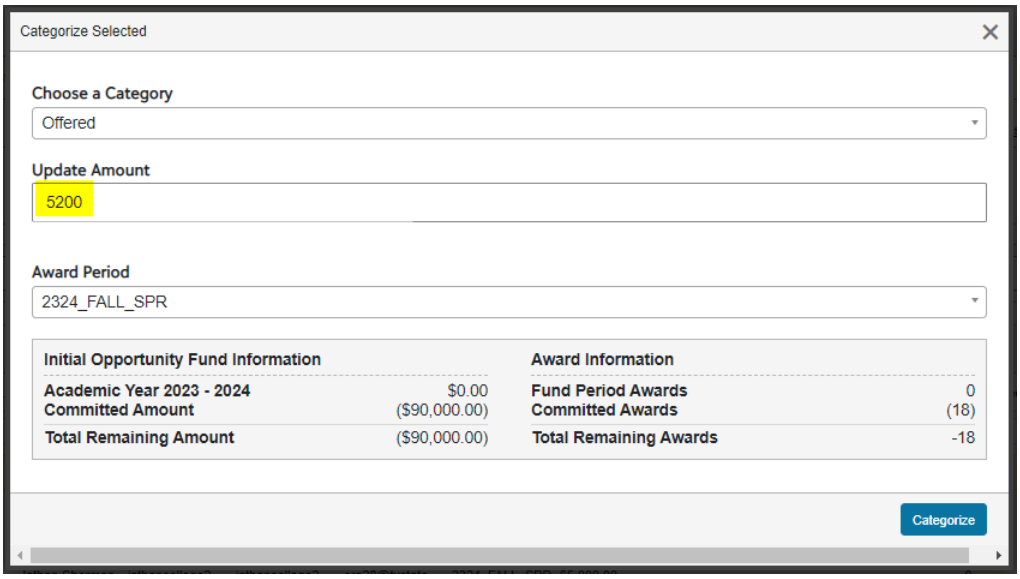
3. Scroll to the bottom of the page and click on *Act on Selected* and click *Categorize*.



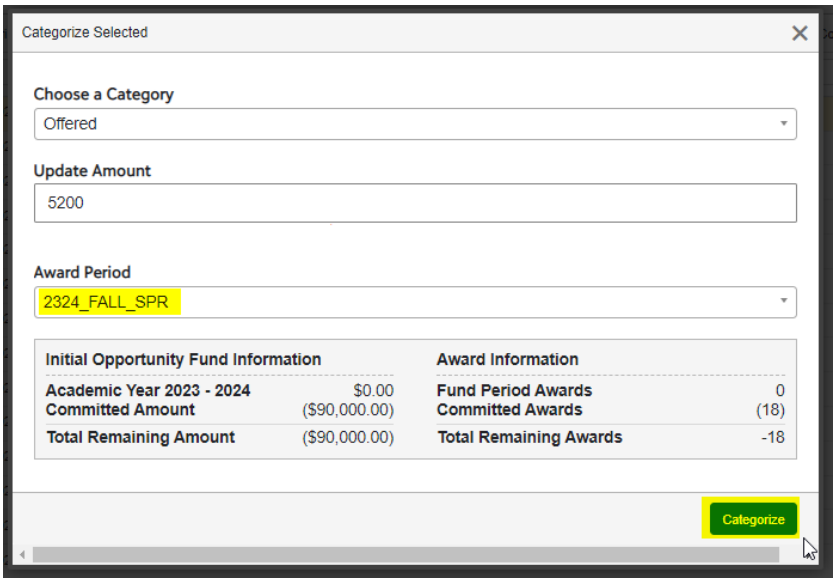
4. Enter the same Category as the existing award. (In this example, the award was in the Offered Category. If the award were already Accepted on the Applications tab, select Accepted).



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*.



Cancelling a Full Award

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

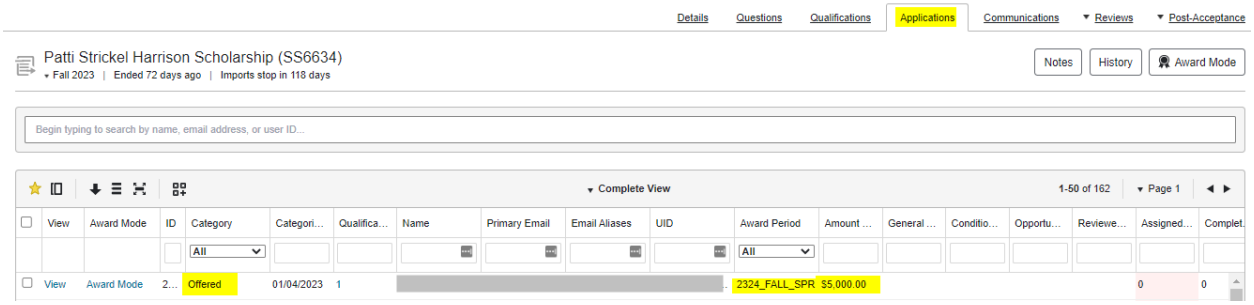
- a student does not accept a scholarship by the deadline, and you would like to cancel the offer and re-offer to another student

- a student does not attend in the fall semester

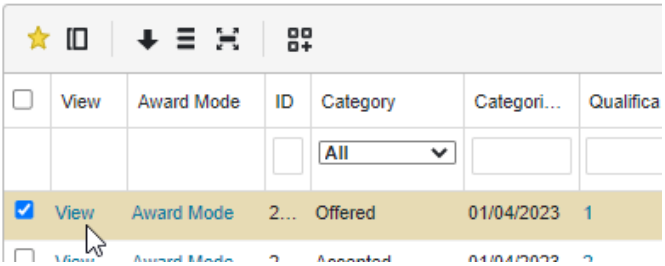
- a student becomes ineligible for the award (such as changing to an ineligible major or not enrolling in the required number of hours)

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

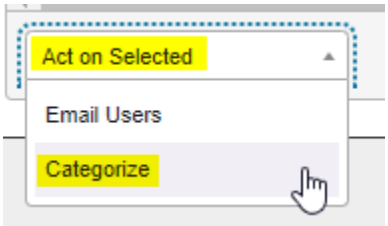
Example: *This student does not accept their offer by the deadline, and you would like to cancel and re-offer to another student.*



2. Select the student.



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



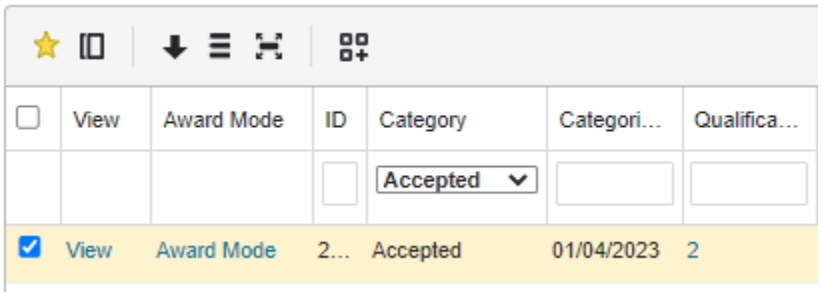
4. Choose the *Cancelled Admin* Category and select *Categorize*.

Cancelling a Partial Award

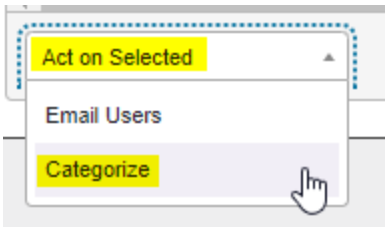
Example: *A student was awarded $5,000 for fall and spring but graduates in the fall and does not attend the spring semester.*

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

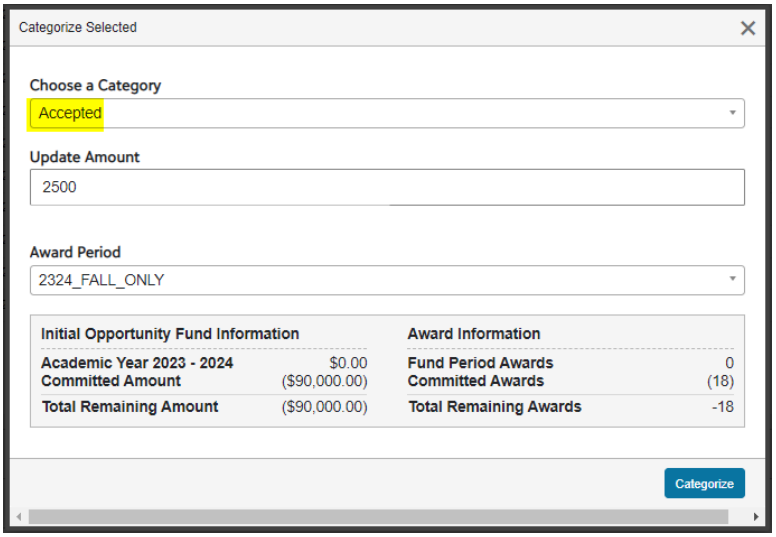
1. Select the student.



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

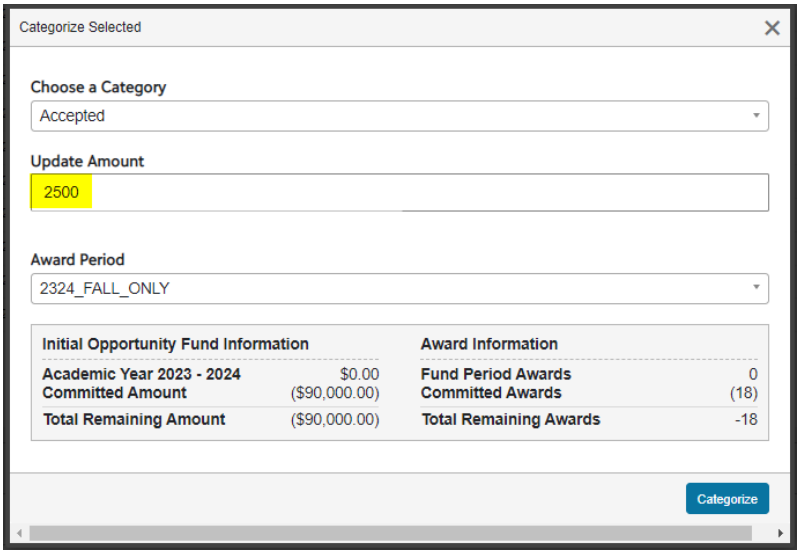


3. Enter the same Category as the existing award. (In this example, the award was in the Accepted Category).



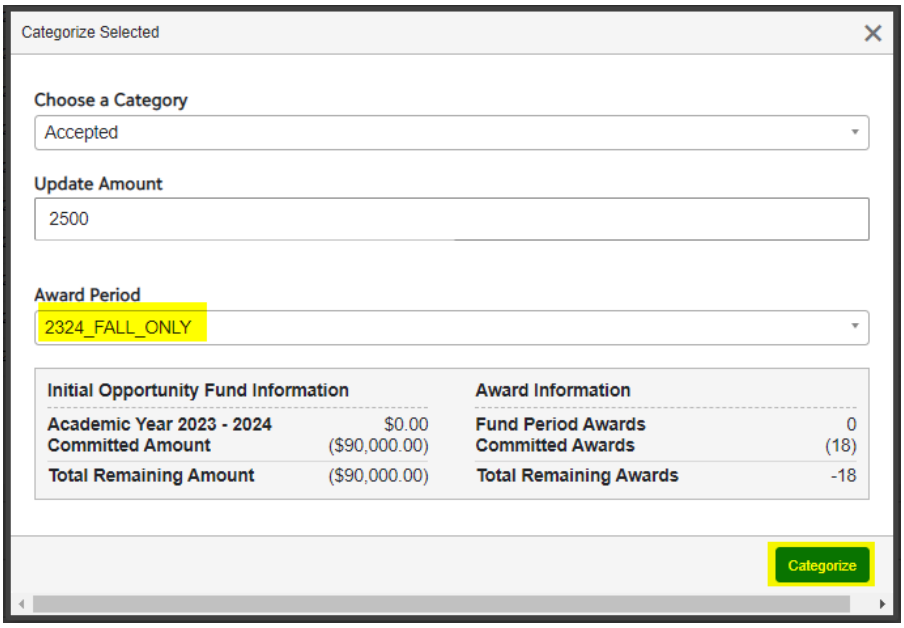
4. Update the Amount to the fall only amount which is $2,500.

(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.*)*



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

In this case, we will select 2324_FALL_ONLY, then select *Categorize*.



Approving Post-Acceptance Applications

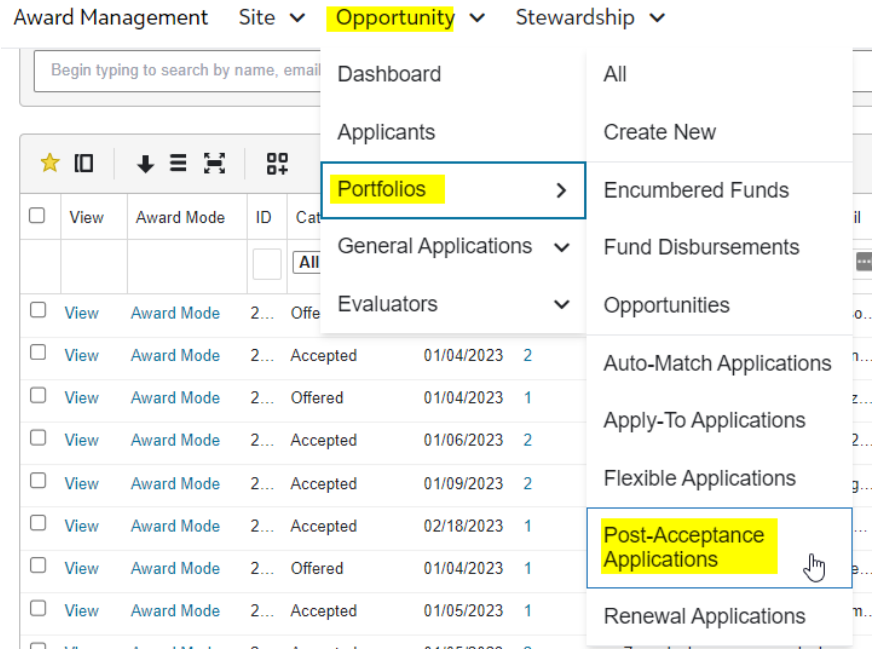
What is Post-Acceptance?

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.

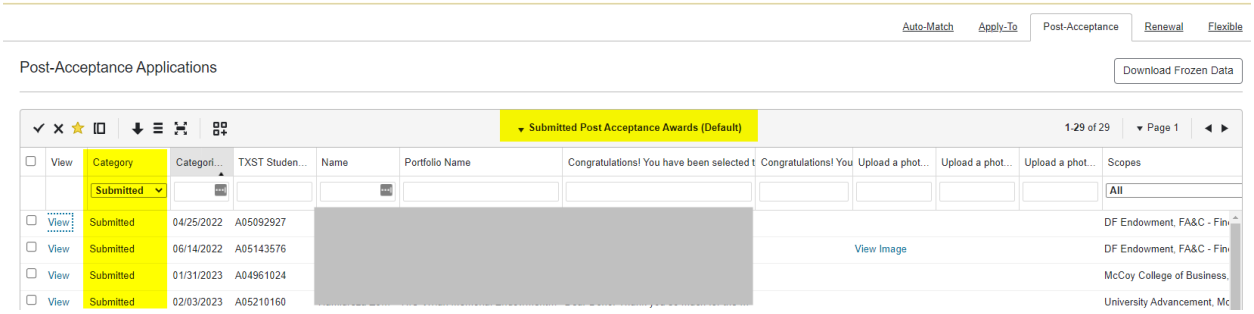
Before funds are awarded and disbursed to students, any scholarship with an outstanding thank you letter requirement must be manually approved by an Opportunity Administrator in your department.

Reviewing Post-Acceptance

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

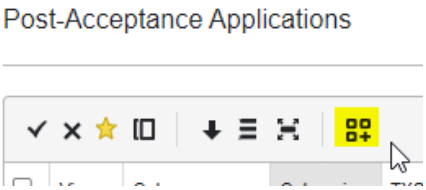


2. The default view will be only Submitted Post-Acceptance, as seen below.

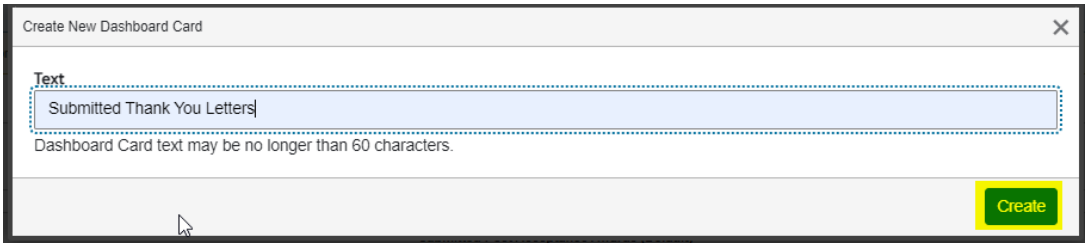


3. **Steps 3 – 5 are optional**. You may want to create a Dashboard Card to easily access your Submitted Post-Acceptance.

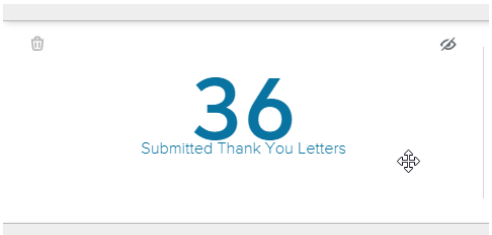
Click the *Create a New Dashboard Card* icon.



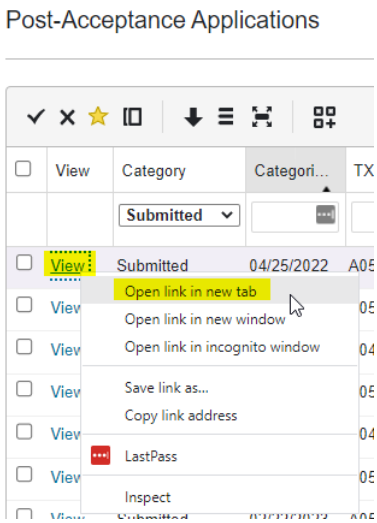
4. Name the Dashboard Card and click *Create*.



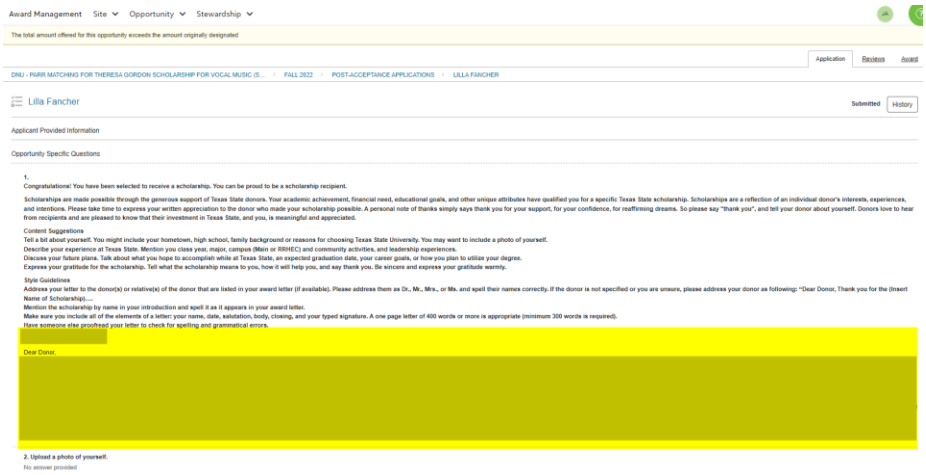
5. You can now click your Dashboard Card to quickly access your Submitted Post-Acceptance Applications.



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

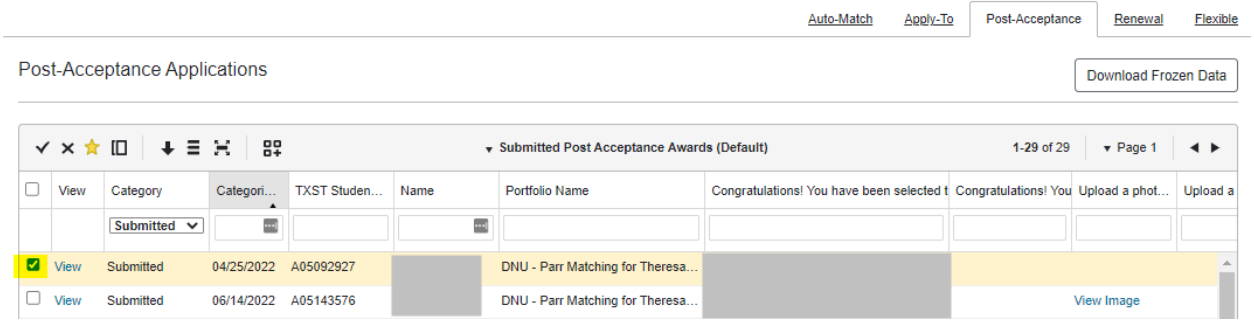


7. Review the letter and then close the tab.

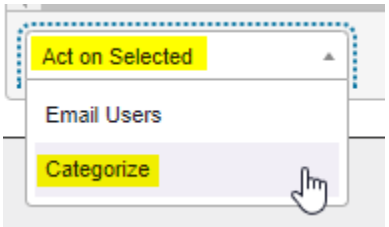


Final Approval of Post-Acceptance

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



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

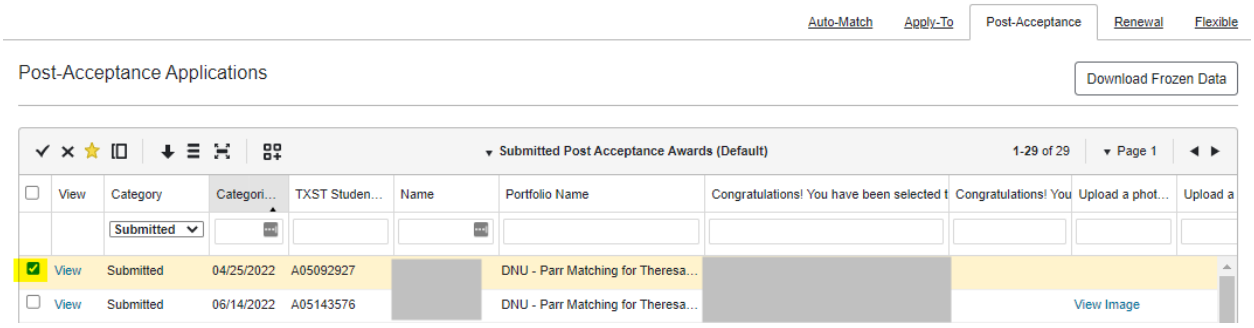


10. Select the *Awarded* Category and click *Categorize*.

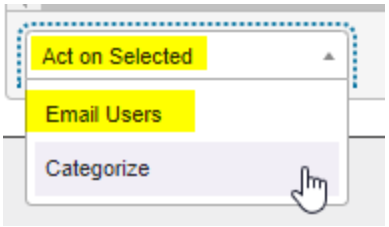
You do not need to input anything when the system requests the award period or the semester. That is used only if you'd like to make changes to an award period or amount.

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.

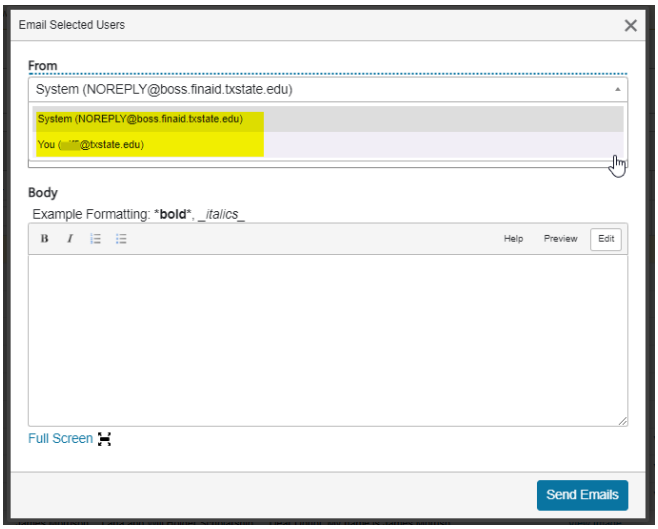


12. Select *Act on Selected* and then *Email Users*.



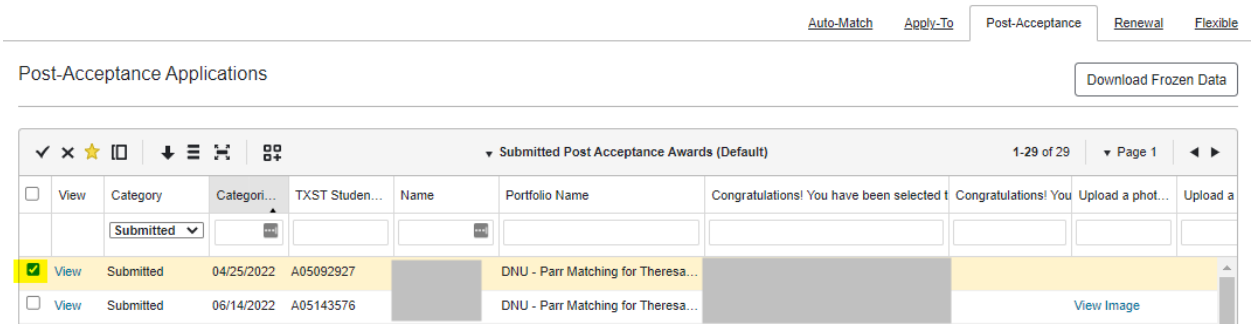
13. If you do not need a response from the student, you may email directly through BOSS. Otherwise, you may choose your personal email so that the student can reply to you.

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

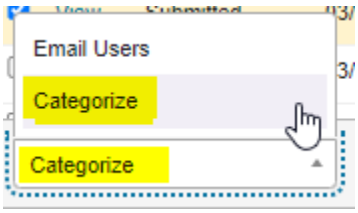


14. Finally, you will need to change the Post-Acceptance Category to *Requested*. This will enable the student to access the Post-Acceptance task in BOSS so that they can re-submit their letter.

Select the student.



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

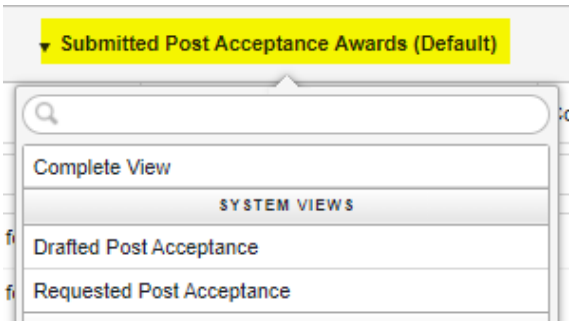


16. Change the Post-Acceptance status to *Requested* and click *Categorize*.

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.

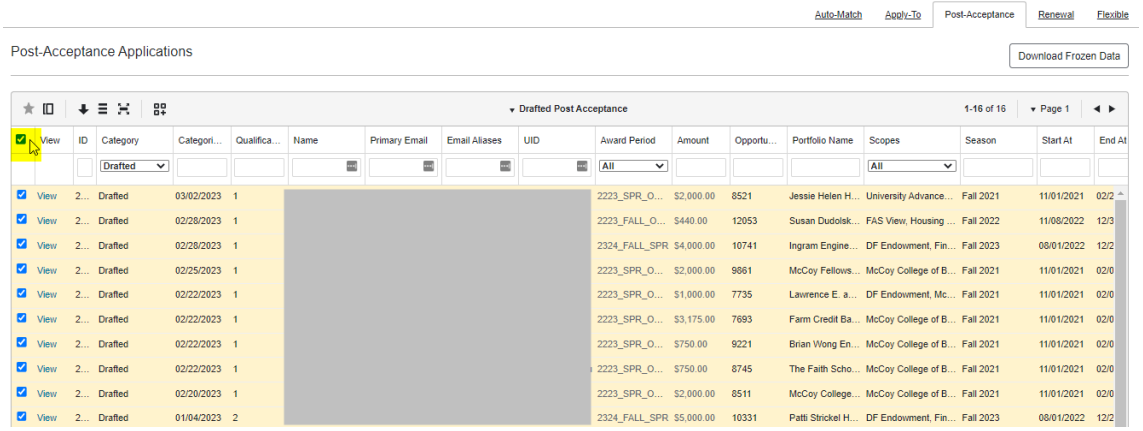
Hover your mouse over Submitted Post Acceptance Awards (Default) and select one of the three views: Pending Post Acceptance, Drafted Post-Acceptance, Requested Post Acceptance.



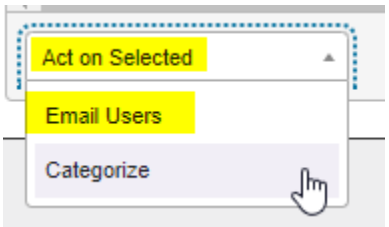
2. Here is a quick reference explaining the three categories and the message your email will want to convey:

Pending	Student has not accepted the award offer. **Email may be sent to remind the student to accept their scholarship <u>and</u> 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.

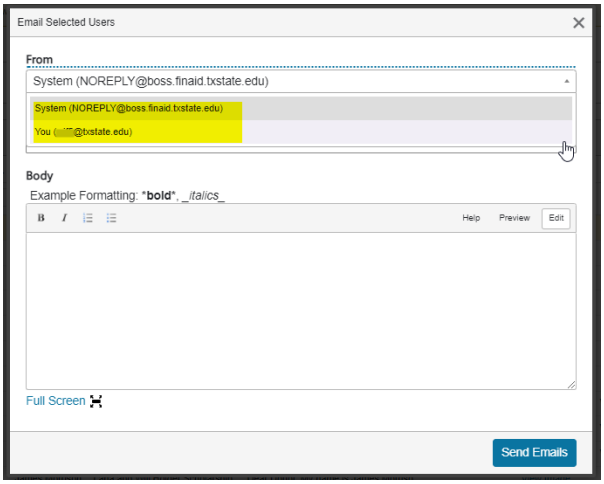


4. Select *Act on Selected* and then *Email Users*.



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.

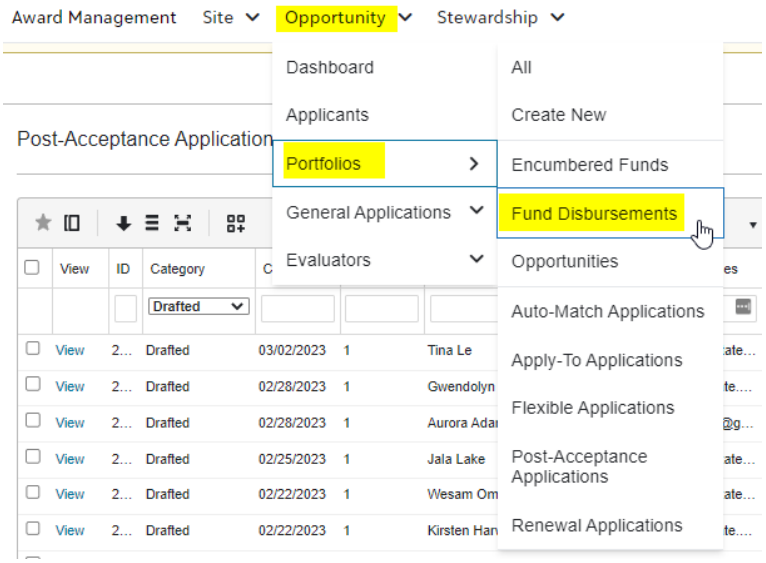
Enter the email subject, body of your email, then click *Send Emails*.



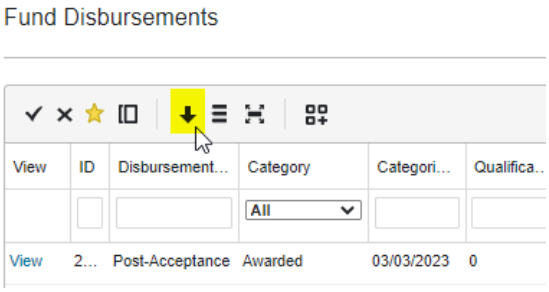
Disbursement Reports

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

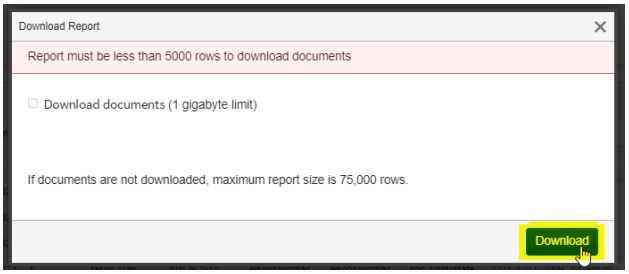
1. To download a Disbursement Report, click *Opportunity>Portfolios>Fund Disbursements*.



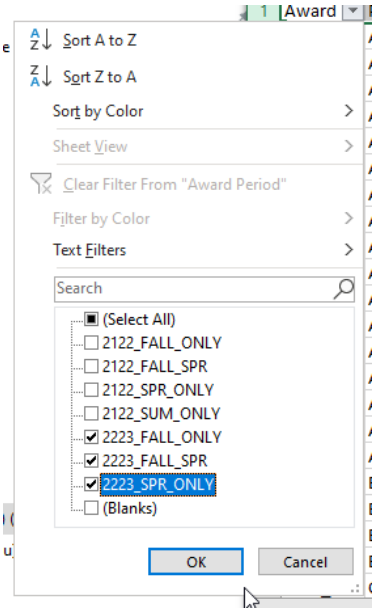
2. Click the download icon.



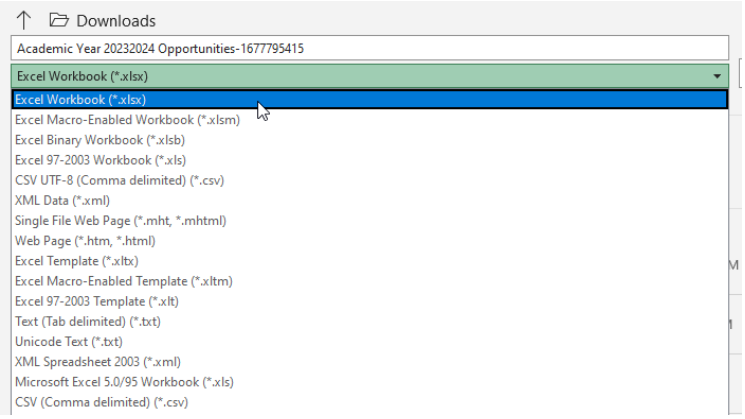
3. Click *Download*.



4. Sort and filter as needed.

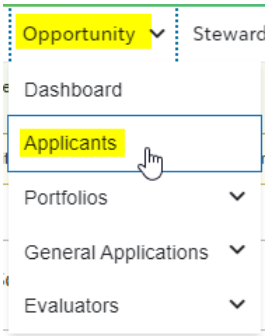


5. Make sure to save as an Excel Workbook. If you leave the file as a CSV file type, your edits to the spreadsheet will not be saved.

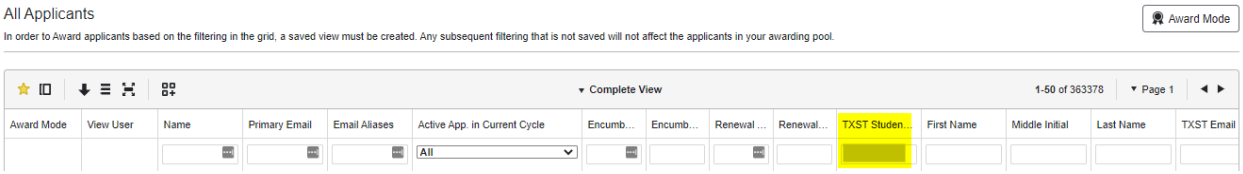


Viewing Log of Emails Sent to Student

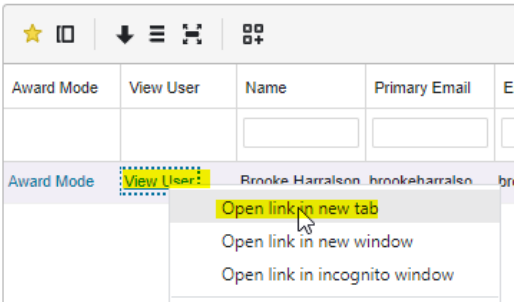
1. To view the correspondence that was sent to students, click Opportunity>Applicants.



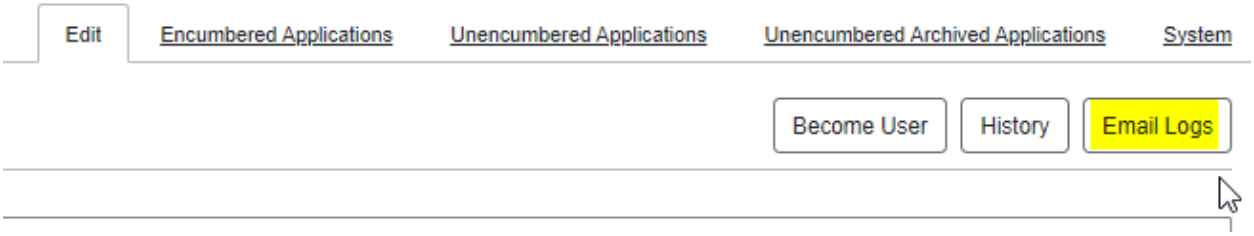
2. Enter the Student ID number and hit Enter.



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)* 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. One 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 or contact:

Ray Gonzalez

System Analyst

Direct Line: (512) 245-3193

For general BOSS and scholarship questions, please email 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.*