

BOSS Awarding Handbook

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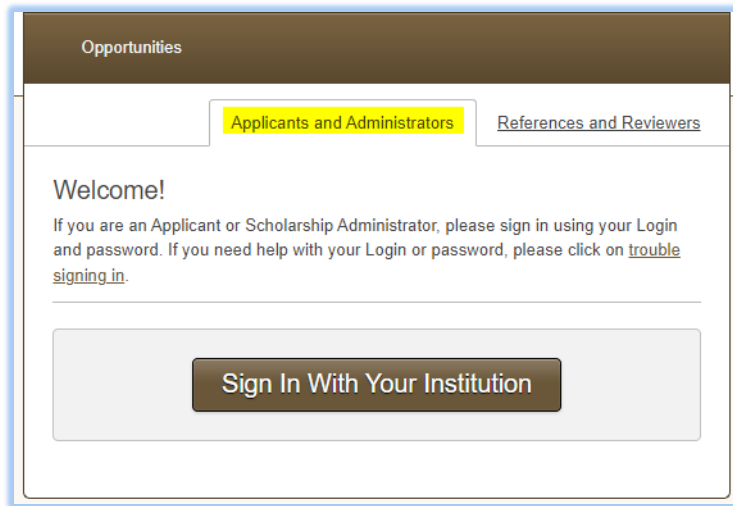
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Logging into BOSS

1. Navigate to boss.txstate.edu.
2. Under the *Applicants and Administrators* tab, click *Sign In With Your Institution*.



Opportunities

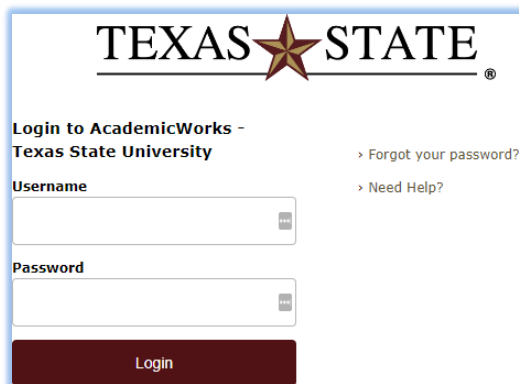
Applicants and Administrators References and Reviewers

Welcome!

If you are an Applicant or Scholarship Administrator, please sign in using your Login and password. If you need help with your Login or password, please click on [trouble signing in](#).

Sign In With Your Institution

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



TEXAS STATE

Login to AcademicWorks - Texas State University

> Forgot your password?

> Need Help?

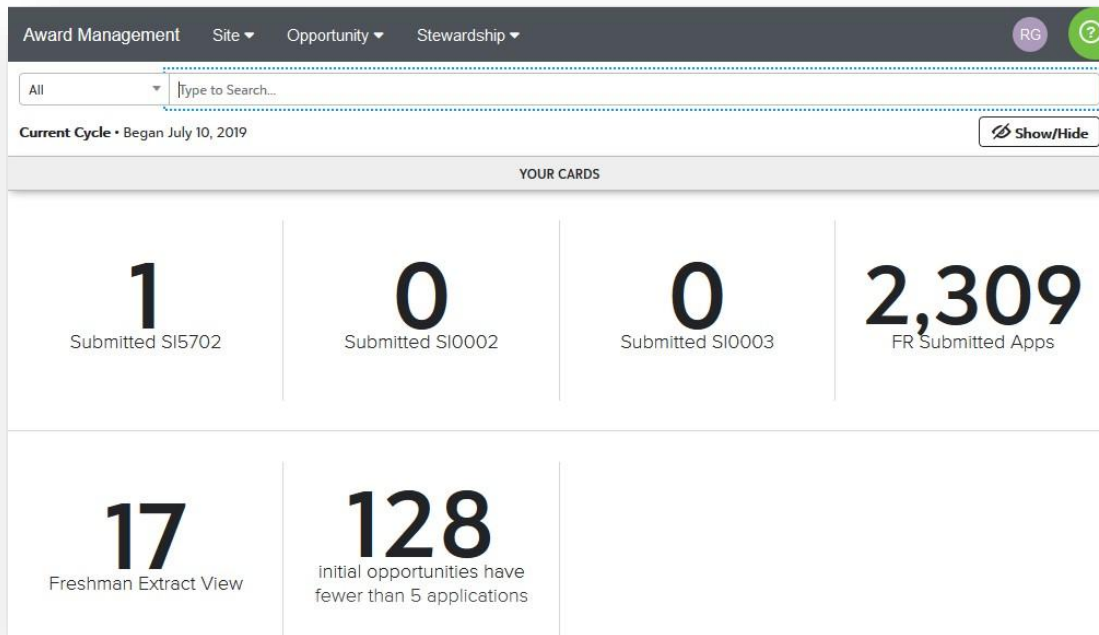
Username

Password

Login

Dashboard

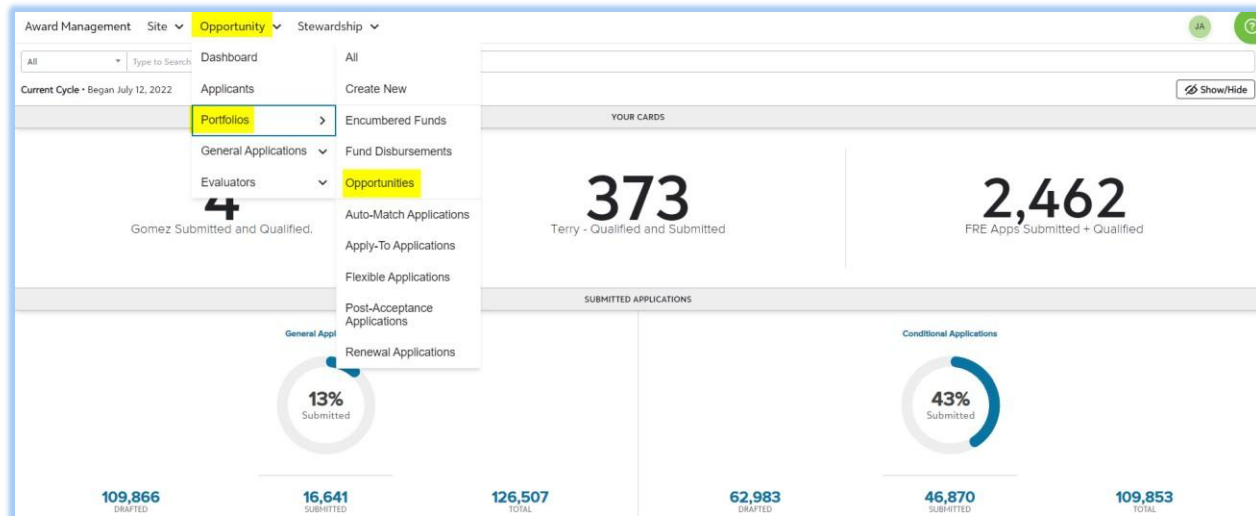
The BOSS landing page is referred to as your **Dashboard**. The **Your Cards** section is a tool that allows you to create custom **Dashboard Cards** to display up-to-date information about your scholarships. Dashboard Cards may be created in various pages through BOSS and will be addressed later in 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 2024-2025 Opportunities.

The screenshot shows a table titled 'Academic Year 2024-2025 Opportunities'. The table has the following columns: View, ID, Type, Opportunity S..., Fund Period, Code, Auxiliary Code, Name, Fund Period Am..., Fund Period Remal..., Conditional Application, and Start At. The 'Fund Period' column is highlighted with a yellow dropdown menu showing 'Academic Year 2024 - 2025'.

View	ID	Type	Opportunity S...	Fund Period	Code	Auxiliary Code	Name	Fund Period Am...	Fund Period Remal...	Conditional Application	Start At
<input type="checkbox"/>	5561	Renewal	Ended	Academic Year 2024 - 2025	SS0021	68150	1899 Society Endowed Scholarship (SS0021)	\$2,600.00	\$2,600.00		05/20/2022
<input type="checkbox"/>	13387	Apply-To	Ended	Academic Year 2024 - 2025	SS0021	68150	1899 Society Endowed Scholarship (SS0021)	\$2,600.00	\$2,600.00		06/01/2022
<input type="checkbox"/>	14259	Apply-To	Ended	Academic Year 2024 - 2025	SH0012		A Hundred for A Hundred Scholarship (SH0012)	\$0.00	\$0.00		02/15/2022
<input type="checkbox"/>	13324	Auto-Match	Ended	Academic Year 2024 - 2025	SA0018	68111	A Federal Credit Union Endowed Graduate Scholarship (SA0018)	\$5,200.00	\$0.00	College of Education P	11/01/2022

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 in which 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.

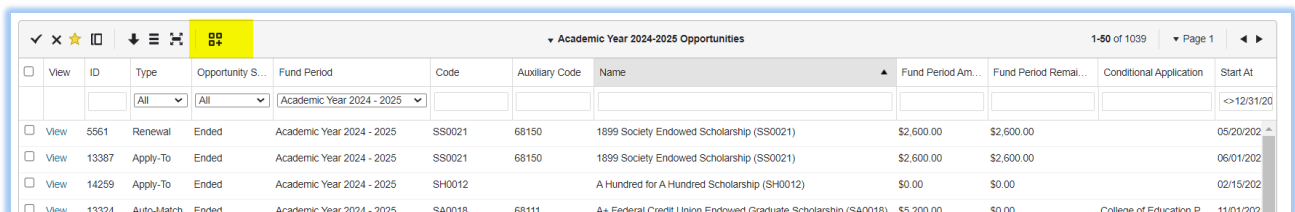
Start At and **End At** dates indicate when the application is open for students to apply.

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.

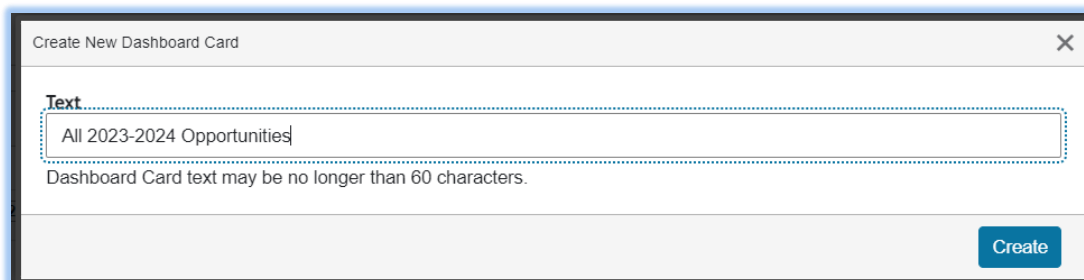
Creating a Dashboard Card - All Scholarship Opportunities

1. To create a Dashboard Card for your 2024-2025 Opportunities, click the *Add Card* icon.



<input type="checkbox"/> View	ID	Type	Opportunity S...	Fund Period	Code	Auxiliary Code	Name	Fund Period Am...	Fund Period Remai...	Conditional Application	Start At
<input type="checkbox"/> View	5561	Renewal	Ended	Academic Year 2024 - 2025	SS0021	68150	1899 Society Endowed Scholarship (SS0021)	\$2,600.00	\$2,600.00		05/20/202
<input type="checkbox"/> View	13387	Apply-To	Ended	Academic Year 2024 - 2025	SS0021	68150	1899 Society Endowed Scholarship (SS0021)	\$2,600.00	\$2,600.00		06/01/202
<input type="checkbox"/> View	14259	Apply-To	Ended	Academic Year 2024 - 2025	SH0012		A Hundred for A Hundred Scholarship (SH0012)	\$0.00	\$0.00		02/15/202
<input type="checkbox"/> View	13324	Auto-Match	Ended	Academic Year 2024 - 2025	SA0018	68111	A+ Federal Credit Union Endowed Graduate Scholarship (SA0018)	\$5,200.00	\$0.00	College of Education B...	11/01/202

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



Create New Dashboard Card

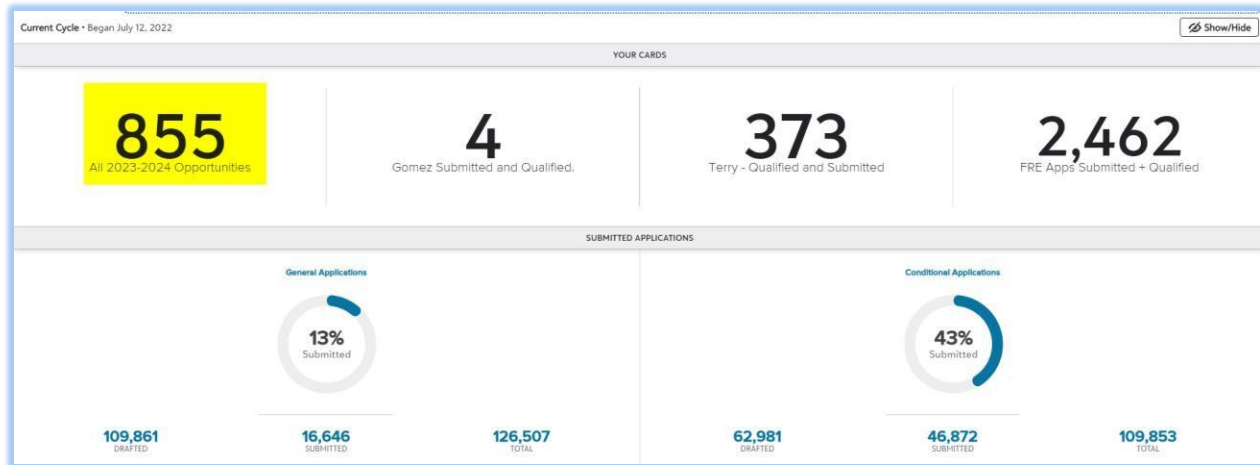
Text

All 2023-2024 Opportunities

Dashboard Card text may be no longer than 60 characters.

Create

3. Your Dashboard Card is now created.



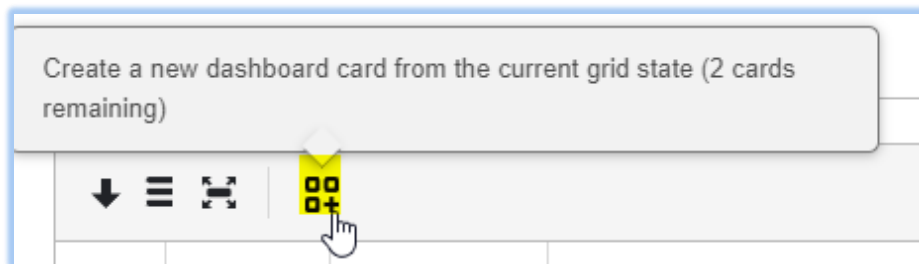
4. You may also choose to create a Dashboard Card for other Fund Periods. To do so, use the drop-down to switch the Fund Period.

Opportunities

▼ Academic Year 2023-2024 Opportunities

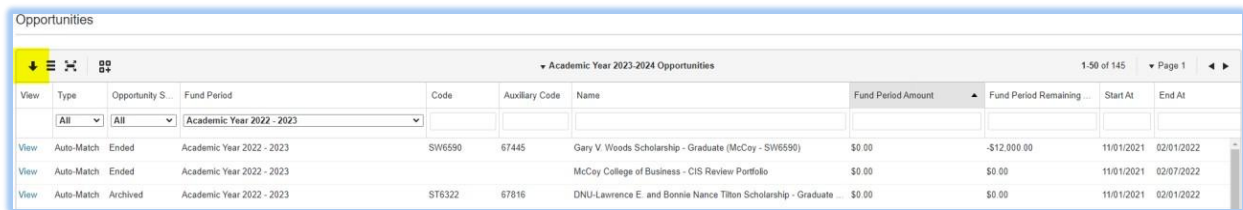
View	Type	Opportunity S...	Fund Period	Code	Auxiliary Code	Name	Fund Period Amount
	All	All	Academic Year 2023 - 2024				
View	Auto-Match	Ended	Academic Year 2023 - 2024	SG0022	48045	Federico and Martha Gorbea Scholarship (SG0022)	\$0.00
View	Auto-Match	Ended	Academic Year 2021 - 2022	SA0012	48006	Accounting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

5. Click the Add Card icon.



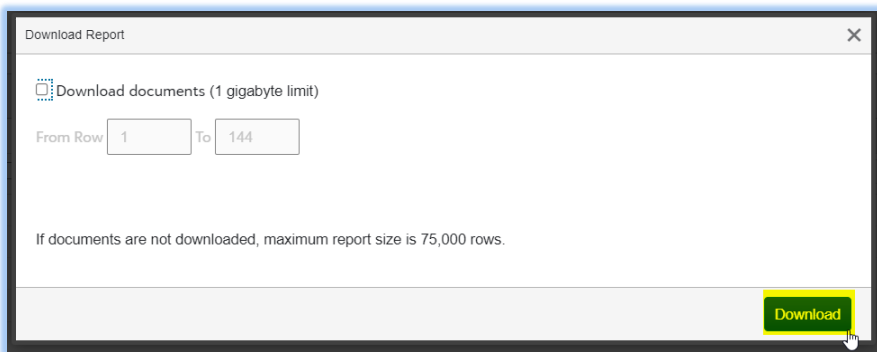
Downloading a Report - All Scholarship Opportunities

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



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	\$0.00	11/01/2021	02/01/2022

2. Click Download.



Download Report

Download documents (1 gigabyte limit)

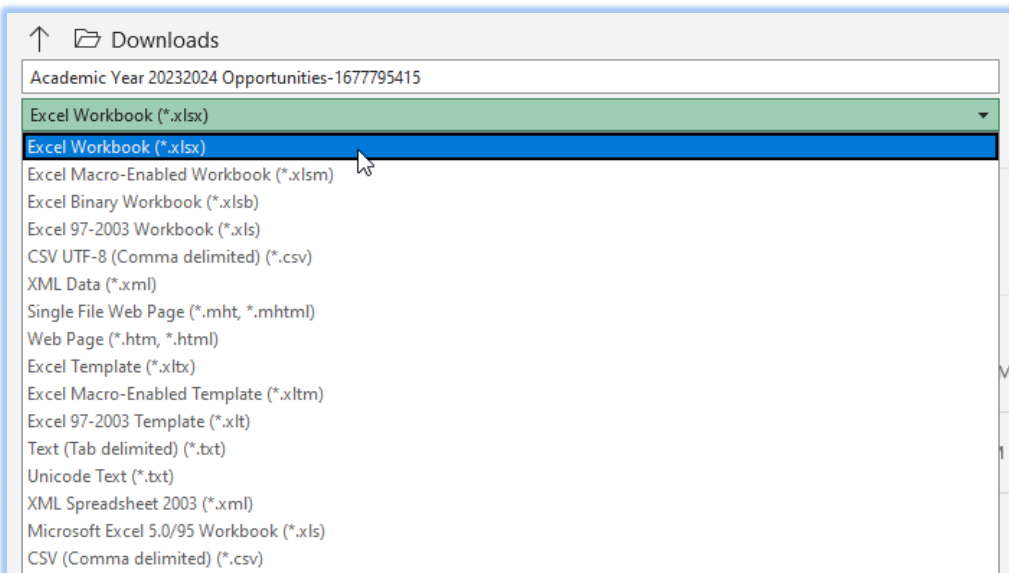
From Row To

If documents are not downloaded, maximum report size is 75,000 rows.

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.

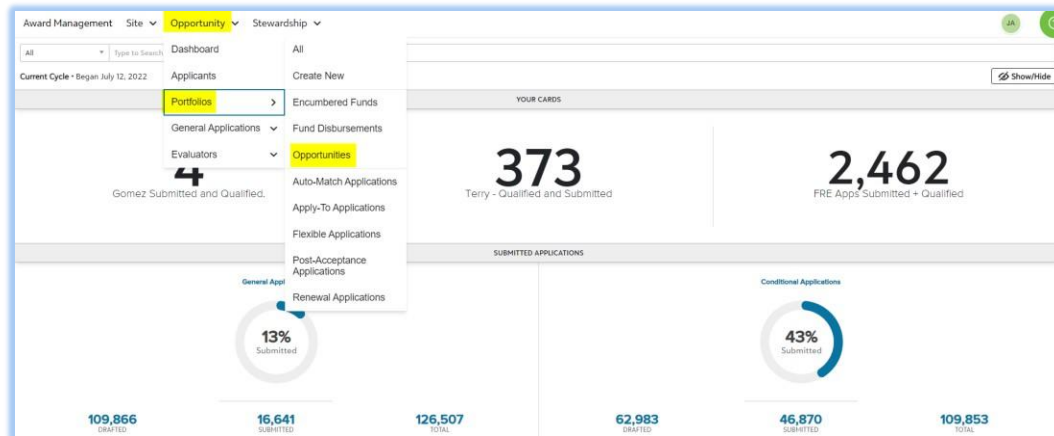


Locating Specific Scholarship Opportunities

There are two ways to view your specific scholarship opportunities.

Option 1

1. Click *Opportunity > Portfolios > Opportunities*.

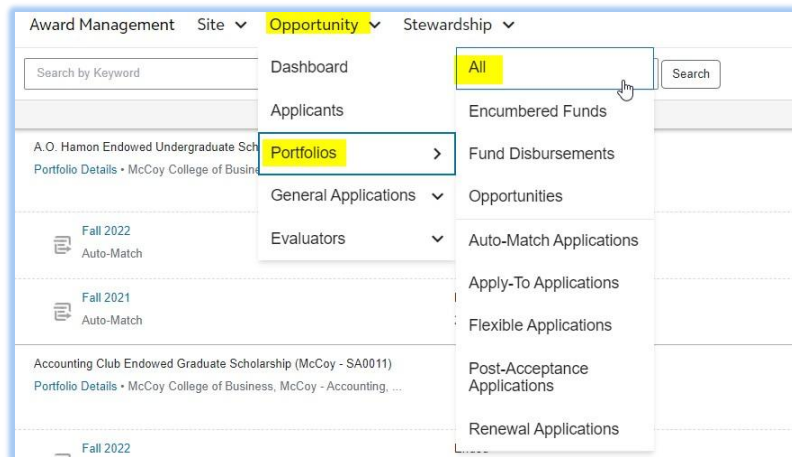


2. Right click *View* next to the specific Opportunity and then *Open link in new tab*.

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

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

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

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

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

Fund Period is the academic year in which 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 to apply.

Example:

Applicant Tab

College of Science and Engineering
▼ Current

Notes (1)History

Add Applicant Question

ApplicantAdministratorReviewable

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

ApplicantAdministratorReviewable

Reviewable?	Field	Label	Required?	Answered By	Type	Source
<input type="checkbox"/> Select 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.

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

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

FAS: 03/10/2025

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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.

Choose a question to qualify on. ▼

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](#)

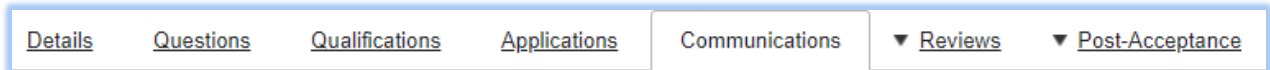
This will send you to a grid of your applicants where you can view student Banner information and their application responses.

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"/>			<input type="checkbox"/>	All ▼							
<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

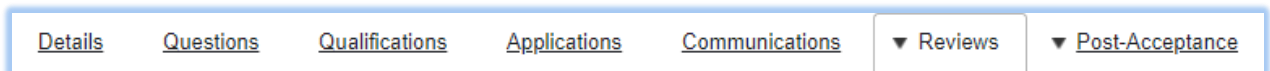
Communications Tab



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

The screenshot shows the 'Offer Email' tab selected. The 'Subject' field contains: 'You have been selected for the {{ portfolio.name }} award!'. The 'Body' field contains a template for an email, including a greeting, congratulations, a link to the opportunity, and a thank you. The 'Body' field has a rich text editor interface with buttons for Bold, Italic, and Link.

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.

The screenshot shows the 'Assigned Reviewers' table for the 'A Hundred for A Hundred Scholarship (SH0012)'. The table has columns for Name, Groups, Reviewed / Assigned, and Actions. There are 7 rows of reviewers, each with an 'Assignments' button.

Name	Groups	Reviewed / Assigned	Actions
	2023-2024 FA&C - Art & Design	0 / 0	Assignments
	2023-2024 FA&C - Art & Design	0 / 0	Assignments
	2023-2024 FA&C - Art & Design	0 / 0	Assignments
	2023-2024 FA&C - Art & Design	0 / 0	Assignments
	2023-2024 FA&C - Art & Design	0 / 0	Assignments
	2023-2024 FA&C - Art & Design	0 / 0	Assignments
	2023-2024 FA&C - Art & Design	0 / 0	Assignments

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

Post-Acceptance Tab

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

The screenshot shows the 'Post-Acceptance' tab for the scholarship opportunity 'Bring Bobcats Back – Crankstart Re-entry Scholars (SB0020)'. The interface includes a search bar, a table of award data, and navigation controls. The table displays columns for View, ID, Category, Awarded date, Name, Primary Email, Email Aliases, UID, Award Period, Amount, Renewal, Iteration, Anticipat..., Upload a phot..., and Congratulations! ^.

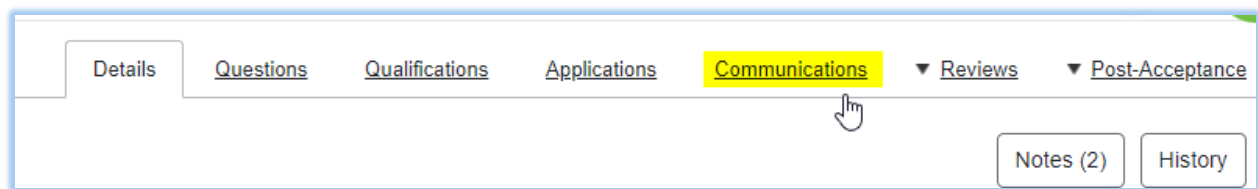
View	ID	Category	Awarded	Name	Primary Email	Email Aliases	UID	Award Period	Amount	Renewal	Iteration	Anticipat...	Upload a phot...	Congratulations! ^
<input type="checkbox"/>	2...	Awarded	08/10/2022					2223_FALL_SPR	\$5,000.00			\$0.00	View image	August 9, 2022...
<input type="checkbox"/>	2...	Awarded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

This is not where you change the award status. If you are cancelling an offer, please do this on the Applications tab.

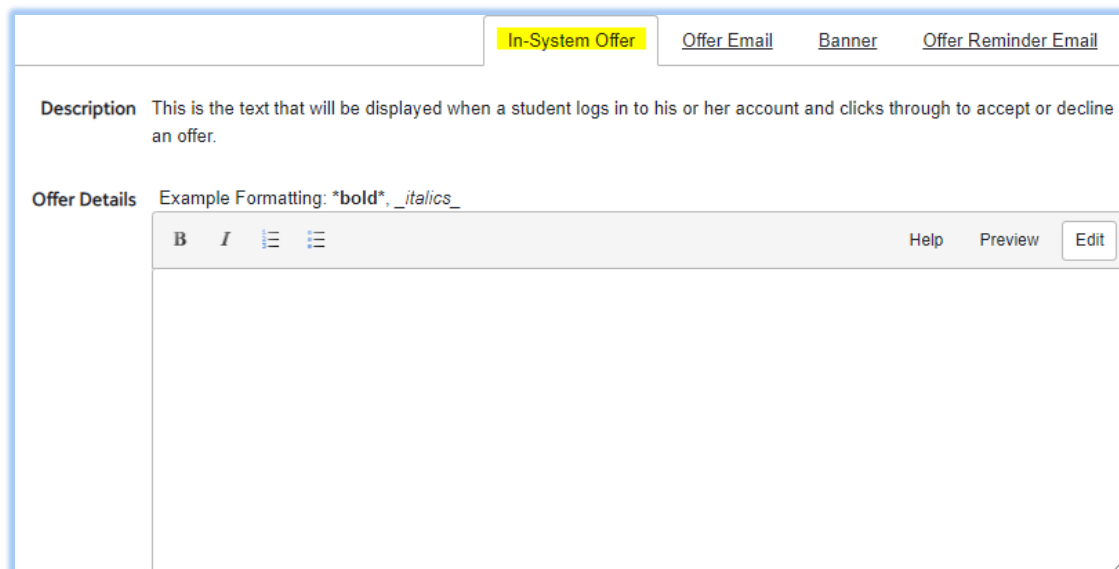
Awarding Procedures

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.

The screenshot shows the 'Offer Email' template editor. At the top, there are tabs: 'In-System Offer', 'Offer Email' (selected), 'Banner', and 'Offer Reminder Email'. Below the tabs, a description states: '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.' The 'Subject' field contains the text: 'You have been selected for the {{ portfolio name }} award!'. The 'Body' field is a rich text editor with a toolbar showing bold, italic, and list icons. The body text reads: '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'. Below the body field, there is a section for 'Available Merge Fields' with a list of fields: offer_url, applicant.name, applicant.email, portfolio.name, application.applicant_url, application.amount, application.award_term, and donor_profile_links. At the bottom, the 'Deliver When' dropdown is set to 'Immediately'. A green 'Update Email Template' button is located at the bottom right.

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.

The screenshot shows the 'Post-Acceptance Email' template editor. At the top, there are tabs: 'In-System Offer', 'Offer Email', 'Banner', 'Offer Reminder Email', 'Post-Acceptance Email' (selected), and 'Post-Acceptance Banner'. Below the tabs, a description states: '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.' The 'Subject' field contains the text: 'You need to finish your application for the {{ portfolio name }} award!'. The 'Body' field is a rich text editor with a toolbar showing bold, italic, and list icons. The body text reads: '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'. Below the body field, there is a section for 'Available Merge Fields' with a list of fields: post_acceptance_application_url, applicant.name, applicant.email, portfolio.name, application.applicant_url, application.amount, application.award_term, and donor_profile_links. At the bottom, the 'Deliver When' dropdown is set to 'Immediately'. A green 'Update Email Template' button is located at the bottom right.

Determining Qualified Applicants

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

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

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.

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▼ 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"/>			<input type="checkbox"/>	All								All	
<input type="checkbox"/>	View	Award Mode	2...	Submitted	01/09/2023	01/08/2023	1	Anallly 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...	ixot15@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...	dccl22@txstat...		\$0.00
<input type="checkbox"/>	View	Award Mode	2...	Submitted	01/08/2023	01/08/2023	1	Valerie Chavez	mayflowervalle...	mayflowervalle...	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	

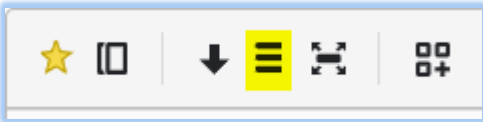
4. Click the Reviewer Score column header until you see the scores sorted from highest to lowest. You will now see your ranked candidates who are eligible for the scholarship as they are qualified and have submitted the application.

▼ 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	

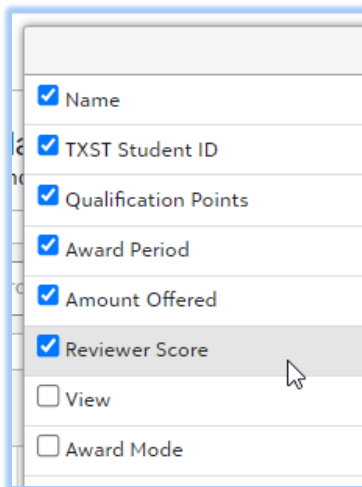
Create Your Own View

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.

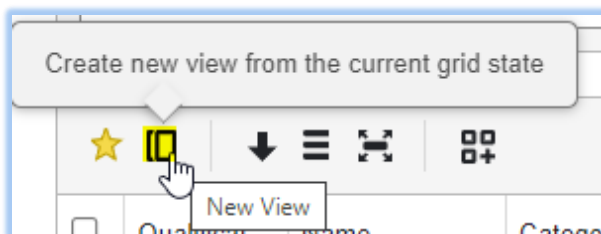


6. Select only the columns you wish to view. At minimum, be sure to include the columns below. You may also wish to include academic data (such as major and GPA) and applicant data (responses to application questions).

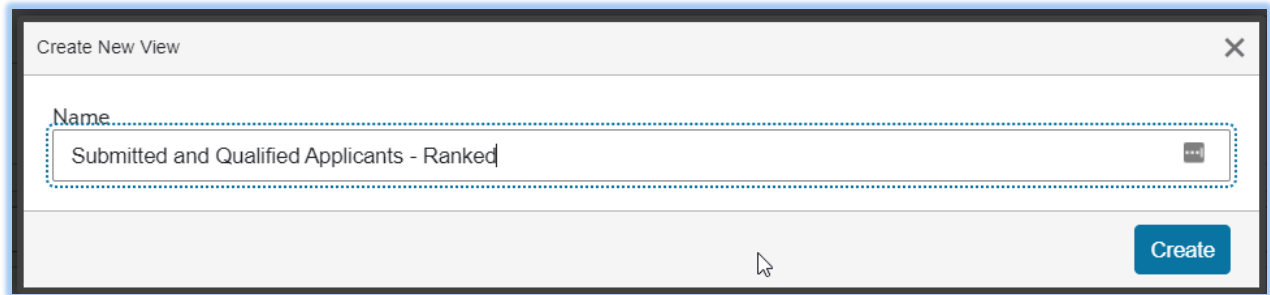


7. You can then rearrange the order of your columns by clicking on the column header and dragging.

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

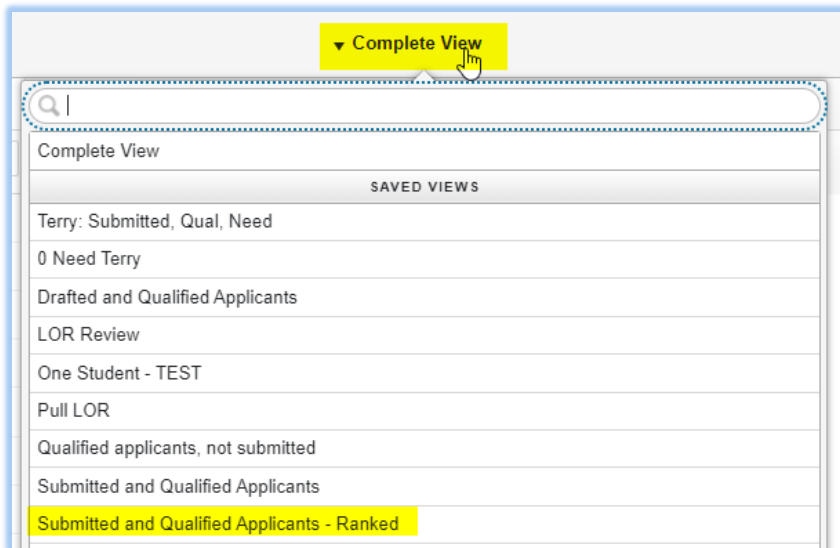


9. Name the new view and click *Create*.



The screenshot shows a 'Create New View' dialog box. At the top, there is a title bar with the text 'Create New View' and a close button (X). Below the title bar is a text input field labeled 'Name'. The input field contains the text 'Submitted and Qualified Applicants - Ranked'. To the right of the input field is a small icon of three dots. At the bottom right of the dialog box is a blue button labeled 'Create'.

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

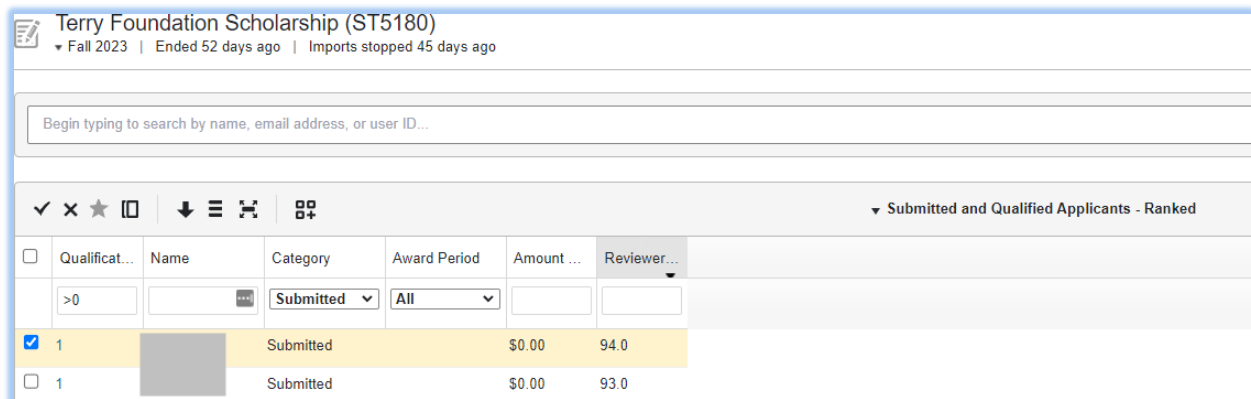


The screenshot shows a dropdown menu titled 'Complete View'. The menu is open, displaying a list of saved views. The first item is 'Complete View'. Below it is a header 'SAVED VIEWS'. The list of saved views includes: 'Terry: Submitted, Qual, Need', '0 Need Terry', 'Drafted and Qualified Applicants', 'LOR Review', 'One Student - TEST', 'Pull LOR', 'Qualified applicants, not submitted', 'Submitted and Qualified Applicants', and 'Submitted and Qualified Applicants - Ranked'. The last item, 'Submitted and Qualified Applicants - Ranked', is highlighted in yellow. A mouse cursor is pointing at the 'Complete View' header.

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.



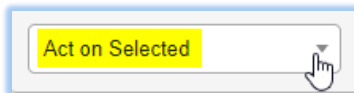
Terry Foundation Scholarship (ST5180)
▼ Fall 2023 | Ended 52 days ago | Imports stopped 45 days ago

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

Submitted and Qualified Applicants - Ranked

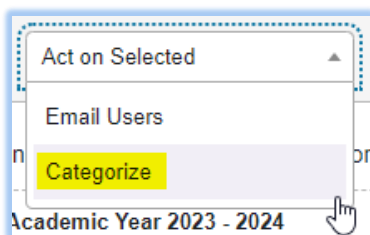
<input type="checkbox"/>	Qualificat...	Name	Category	Award Period	Amount ...	Reviewer...
<input type="checkbox"/>	>0		Submitted	All		
<input checked="" type="checkbox"/>	1		Submitted		\$0.00	94.0
<input type="checkbox"/>	1		Submitted		\$0.00	93.0

2. Scroll down to *Act on Selected*.



Act on Selected

3. Choose *Categorize*.



Act on Selected

Email Users

Categorize

Academic Year 2023 - 2024

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

Offered

Update Amount

5000

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

Award Period

2324_FALL_SPR

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

Selecting the Correct Award Period

Award Period Reference:

2526_FALL_SPR	Award will be evenly divided between fall 2025 and spring 2026.
2526_FALL_ONLY	Award is for fall 2025 only.
2526_SPR_ONLY	Award is for spring 2026 only.
2425_SUM_ONLY	Award is for summer 2025 only.
2425_FALL_SPR	Award will be evenly divided between fall 2024 and spring 2025.
2425_FALL_ONLY	Award is for fall 2024 only.
2425_SPR_ONLY	Award is for spring 2025 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.

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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"/> 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.*

Patti Strickel Harrison Scholarship (SS6634)
▼ Fall 2023 | Ended 72 days ago | Imports stop in 115 days

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

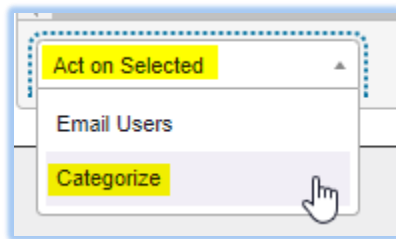
▼ Complete View 1-50 of 162 ▼ Page 1

<input type="checkbox"/>	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 *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).

A screenshot of a 'Categorize Selected' dialog box. It contains the following fields:

- 'Choose a Category' dropdown menu with 'Offered' selected.
- 'Update Amount' text input field with '5200' entered.
- 'Award Period' dropdown menu with '2324_FALL_SPR' selected.
- A table with two columns: 'Initial Opportunity Fund Information' and 'Award Information'.

The table data is as follows:

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

At the bottom right of the dialog box is a blue button labeled 'Categorize'.

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.*)

A screenshot of the same 'Categorize Selected' dialog box as above. The 'Update Amount' text input field, which contains '5200', is highlighted in yellow. All other elements, including the dropdown menus and the table, are identical to the previous screenshot.

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

Categorize Selected

Choose a Category
Offered

Update Amount
5200

Award Period
2324_FALL_SPR

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.*

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

Details Questions Qualifications Applications Communications Reviews Post-Acceptance

Notes History Award Mode

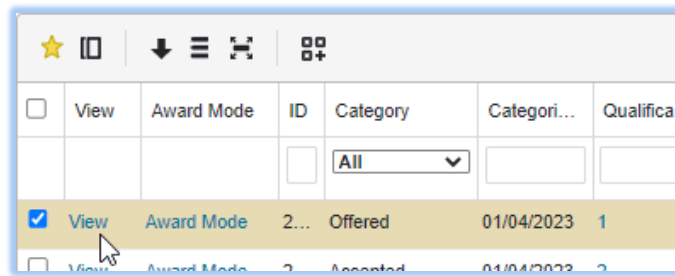
Begin typing to search by name, email address, or user ID...

Complete View 1-50 of 162 Page 1

View	Award Mode	ID	Category	Amount	Award Period	General	Conditions	Opportunities	Reviews	Assigned	Completed
<input type="checkbox"/>	View	2...	Offered	01/04/2023	1						

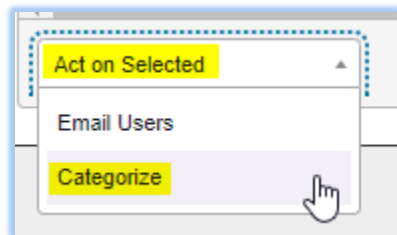
2324_FALL_SPR \$5,000.00

2. Select the student.

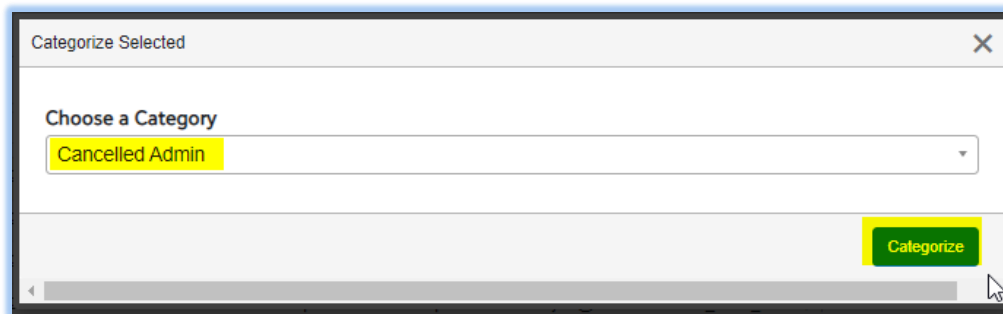


<input type="checkbox"/>	View	Award Mode	ID	Category	Categori...	Qualifica
<input checked="" type="checkbox"/>	View	Award Mode	2...	Offered	01/04/2023	1
<input type="checkbox"/>	View	Award Mode	2	Accepted	01/04/2023	2

3. Scroll to the bottom of the page and click *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.

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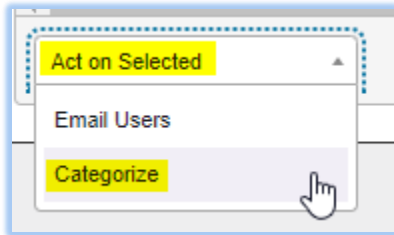
▼ Complete View

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

1. Select the student.

<input type="checkbox"/>	View	Award Mode	ID	Category	Categori...	Qualifica...
<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).

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

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

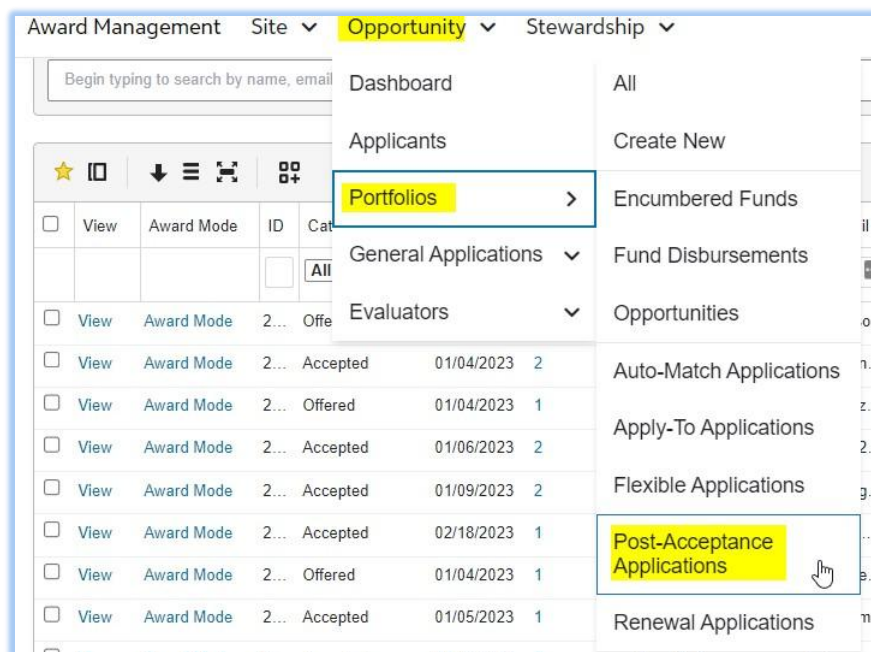
What is Post-Acceptance?

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).

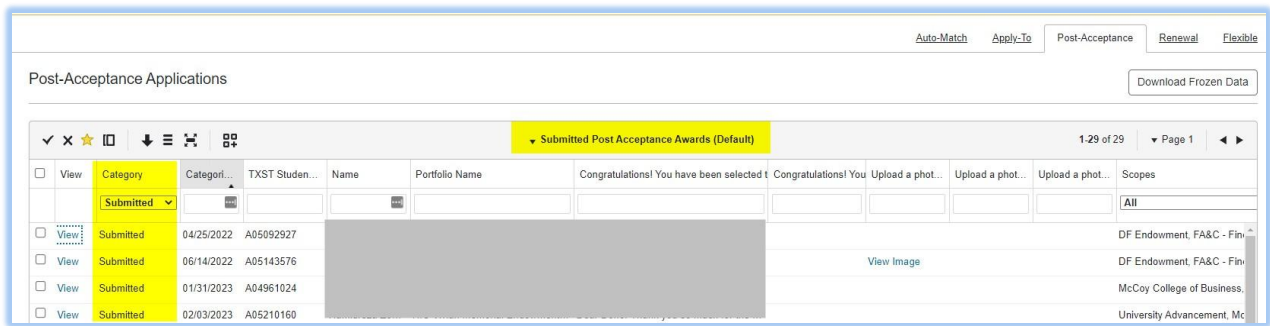
Before funds are awarded and disbursed to students, any scholarship with an outstanding thank you letter requirement must be manually approved by an Opportunity Administrator in your department.

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.

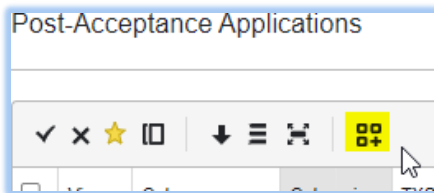


The screenshot shows a web interface for 'Post-Acceptance Applications'. At the top, there are tabs for 'Auto-Match', 'Apply-To', 'Post-Acceptance', 'Renewal', and 'Flexible'. Below the tabs, the title 'Post-Acceptance Applications' is displayed, along with a 'Download Frozen Data' button. A toolbar contains various icons for filtering and sorting. A dropdown menu is open, showing 'Submitted Post Acceptance Awards (Default)' as the selected filter. Below the toolbar, a table lists applications. The 'Category' column is highlighted in yellow, and the 'Submitted' filter is applied to it. The table has columns for '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...', and 'Scopes'. The table shows four rows of data, all with the 'Submitted' category. The first row has a date of 04/25/2022 and a TXST Student ID of A05092927. The second row has a date of 06/14/2022 and a TXST Student ID of A05143576. The third row has a date of 01/31/2023 and a TXST Student ID of A04961024. The fourth row has a date of 02/03/2023 and a TXST Student ID of A05210160. The 'Scopes' column lists various categories: 'DF Endowment, FA&C - Fin', 'DF Endowment, FA&C - Fin', 'McCoy College of Business', and 'University Advancement, Mc'.

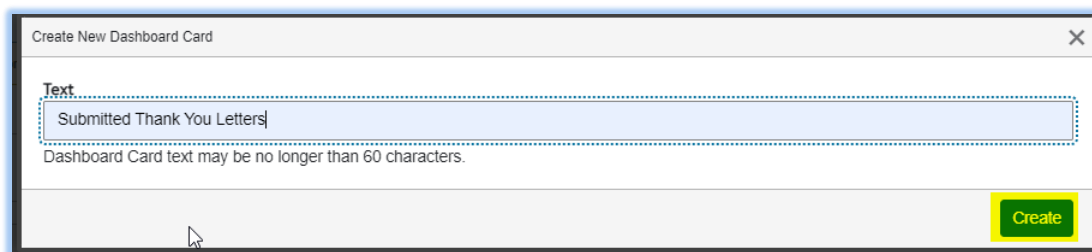
View	Category	Category...	TXST Studen...	Name	Portfolio Name	Congratulations! You have been selected t	Congratulations! You	Upload a phot...	Upload a phot...	Upload a phot...	Scopes
<input type="checkbox"/>	Submitted										All
<input type="checkbox"/>	Submitted	04/25/2022	A05092927								DF Endowment,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

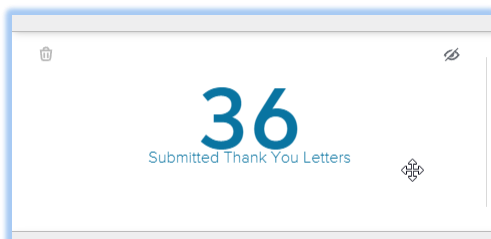


4. Name the Dashboard Card and click *Create*.

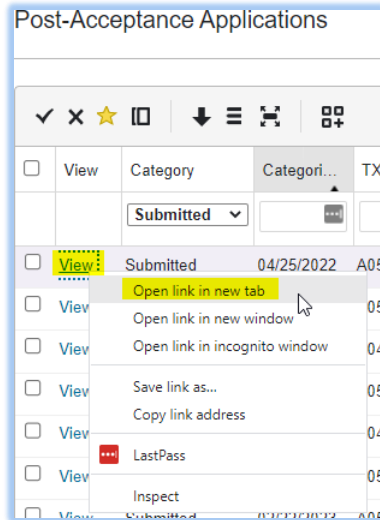


The screenshot shows a dialog box titled 'Create New Dashboard Card'. It has a close button (X) in the top right corner. The dialog box contains a text input field with the text 'Submitted Thank You Letters'. Below the input field, there is a note: 'Dashboard Card text may be no longer than 60 characters.' At the bottom right of the dialog box, there is a green 'Create' button.

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*.

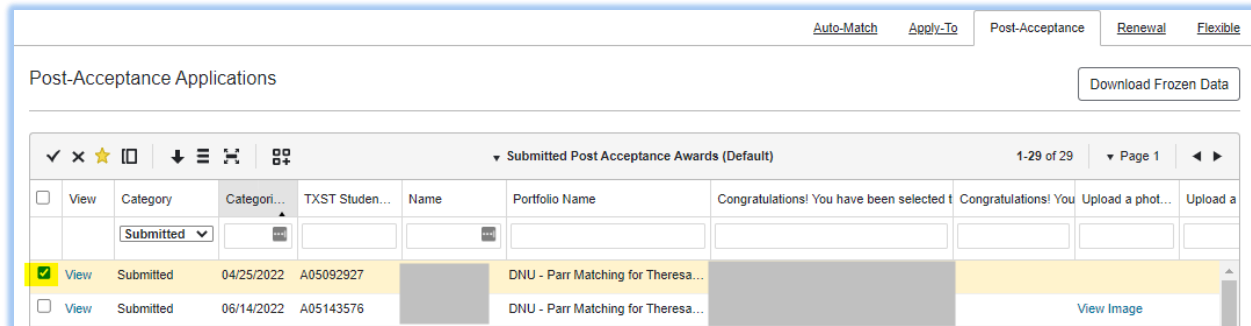


7. Review the letter and then close the tab.

A screenshot of the "Award Management" page in a web application. The page shows details for an applicant named "Lilla Fancher". It includes sections for "Applicant Provided Information", "Opportunity Specific Questions", and "Opportunity Specific Questions". The "Opportunity Specific Questions" section contains a list of questions and a text area for the answer. The text area is highlighted in yellow. The page also includes a "Submitted" button and a "History" link.

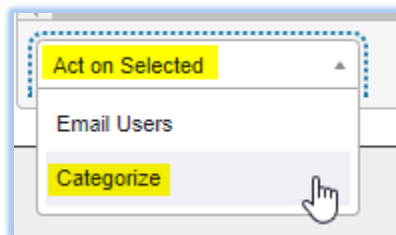
Final Approval of Post-Acceptance

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



The screenshot shows the 'Post-Acceptance Applications' interface. At the top, there are tabs for 'Auto-Match', 'Apply-To', 'Post-Acceptance', 'Renewal', and 'Flexible'. Below the tabs, there's a 'Download Frozen Data' button. The main area displays a table titled 'Submitted Post Acceptance Awards (Default)' with 1-29 of 29 items on Page 1. The table has columns for 'View', 'Category', 'Submitted', 'TXST Studen...', 'Name', 'Portfolio Name', 'Congratulations! You have been selected t', 'Congratulations! You', 'Upload a phot...', and 'Upload a'. Two rows are visible, both with a 'Submitted' status and a 'View' button. The first row has a date of 04/25/2022 and a student ID of A05092927. The second row has a date of 06/14/2022 and a student ID of A05143576. Both rows have a 'DNU - Parr Matching for Theresa...' in the 'Portfolio Name' column.

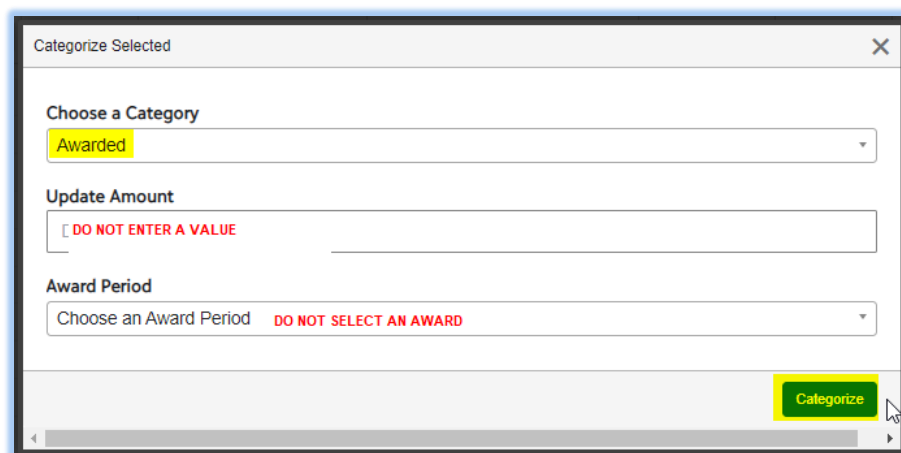
9. Scroll to the bottom of the page and click *Act on Selected* and click *Categorize*.



The screenshot shows a dropdown menu titled 'Act on Selected'. It contains two options: 'Email Users' and 'Categorize'. A mouse cursor is pointing at the 'Categorize' option.

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.



The screenshot shows the 'Categorize Selected' dialog box. It has a close button (X) in the top right corner. The first section is 'Choose a Category' with a dropdown menu showing 'Awarded'. The second section is 'Update Amount' with a text input field containing the text 'DO NOT ENTER A VALUE'. The third section is 'Award Period' with a dropdown menu showing 'Choose an Award Period' and the text 'DO NOT SELECT AN AWARD'. At the bottom right, there is a green 'Categorize' button.

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.

The screenshot shows the 'Post-Acceptance Applications' interface. At the top, there are tabs: 'Auto-Match', 'Apply-To', 'Post-Acceptance' (selected), 'Renewal', and 'Flexible'. Below the tabs is a 'Download Frozen Data' button. The main area displays a table titled 'Submitted Post Acceptance Awards (Default)'. The table has columns: 'View', 'Category', 'Category...', 'TXST Studen...', 'Name', 'Portfolio Name', 'Congratulations! You have been selected t', 'Congratulations! You', 'Upload a phot...', and 'Upload a'. The first row is highlighted in yellow and shows 'Submitted', '04/25/2022', 'A05092927', and 'DNU - Parr Matching for Theresa...'. The second row shows 'Submitted', '06/14/2022', 'A05143576', and 'DNU - Parr Matching for Theresa...'. A 'View Image' link is visible next to the second row.

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

The screenshot shows a dropdown menu with three options: 'Act on Selected', 'Email Users', and 'Categorize'. A hand cursor is pointing at the 'Email Users' option.

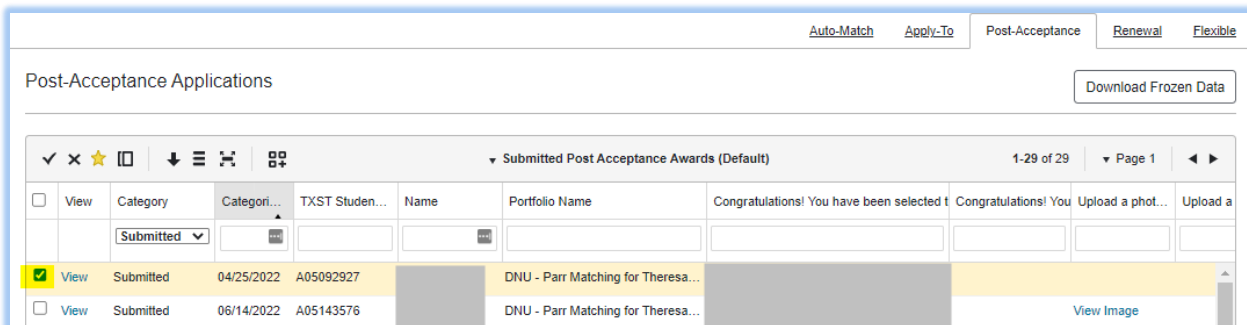
13. If you do not need a response from the student, you may email directly through BOSS. Otherwise, you may choose your personal email so that the student can reply to you.

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

The screenshot shows the 'Email Selected Users' form. It has a 'From' field with a dropdown menu showing 'System (NOREPLY@boss.finaid.txstate.edu)', 'System (NOREPLY@boss.finaid.txstate.edu)', and 'You (j...@txstate.edu)'. The 'Body' field has a text area with a rich text editor toolbar (B, I, U, L, H, P, Preview, Edit). A 'Full Screen' button is at the bottom left, and a 'Send Emails' button is at the bottom right.

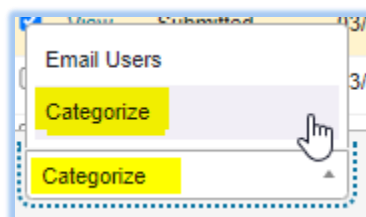
14. Finally, you will need to change the Post-Acceptance Category to *Requested*. This will enable the student to access the Post-Acceptance task in BOSS so that they can re-submit their letter.

Select the student.

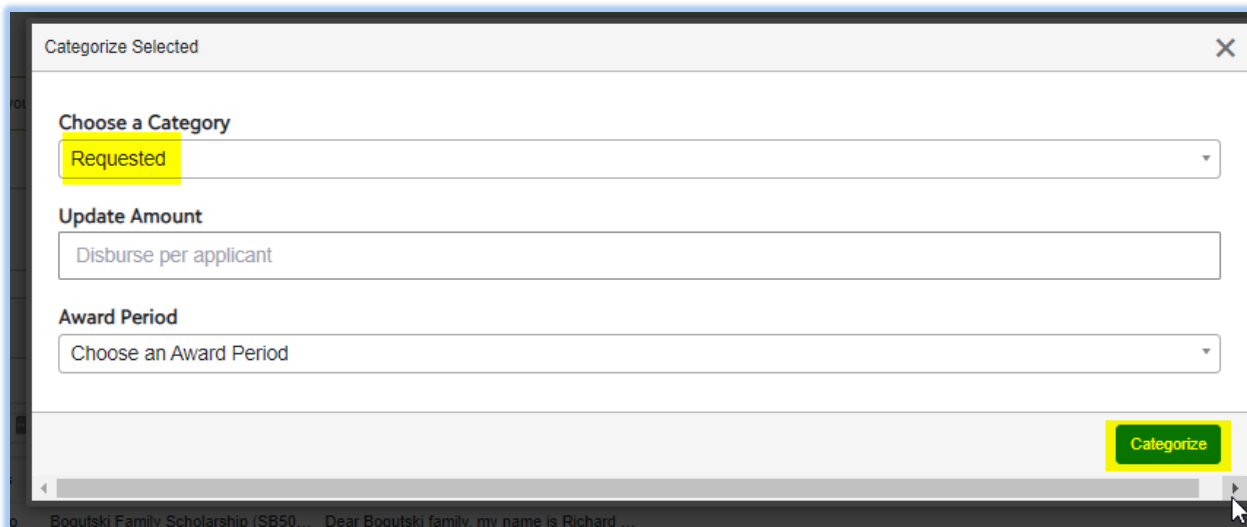


View	Category	Submitted	TXST Student ID	Name	Portfolio Name	Congratulations! You have been selected t	Congratulations! You	Upload a phot...	Upload a
<input checked="" type="checkbox"/>	Submitted	04/25/2022	A05092927		DNU - Parr Matching for Theresa...				
<input type="checkbox"/>	Submitted	06/14/2022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

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

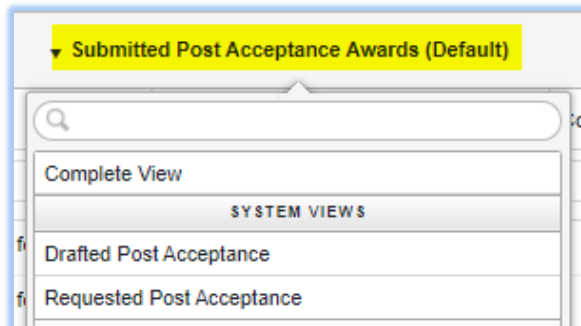
Choose an Award Period

Categorize

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

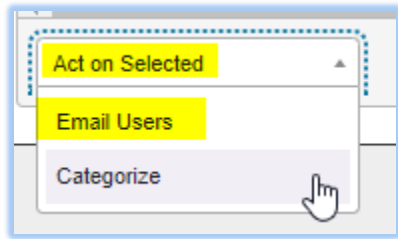
Student has begun writing post-acceptance but has not submitted.

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.

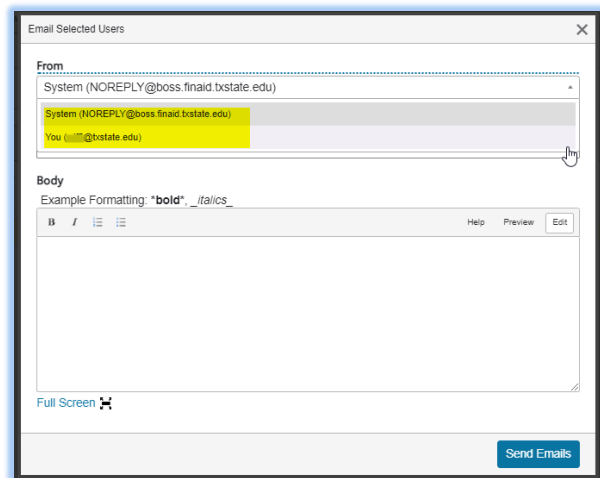
A screenshot of a web application interface titled 'Post-Acceptance Applications'. It features a table with columns for application details. The table is filtered to show 'Drafted Post Acceptance' applications. A yellow highlight is placed over the 'View' button in the first row of the table. The table contains 10 rows of data, each representing a student's application. The columns include ID, Category, Category..., Qualifica..., Name, Primary Email, Email Aliases, UID, Award Period, Amount, Opportu..., Portfolio Name, Scopes, Season, Start At, and End At. The first row shows a student named 'Jessie Helen H...' with an award amount of \$2,000.00. The second row shows 'Susan Dudolsk...' with an award amount of \$440.00. The third row shows 'Ingram Engine...' with an award amount of \$4,000.00. The fourth row shows 'McCoy Fellows...' with an award amount of \$2,000.00. The fifth row shows 'Lawrence E. a...' with an award amount of \$1,000.00. The sixth row shows 'Farm Credit Ba...' with an award amount of \$3,175.00. The seventh row shows 'Brian Wong En...' with an award amount of \$750.00. The eighth row shows 'The Faith Scho...' with an award amount of \$750.00. The ninth row shows 'McCoy College...' with an award amount of \$2,000.00. The tenth row shows 'Patti Strickel H...' with an award amount of \$5,000.00.

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.

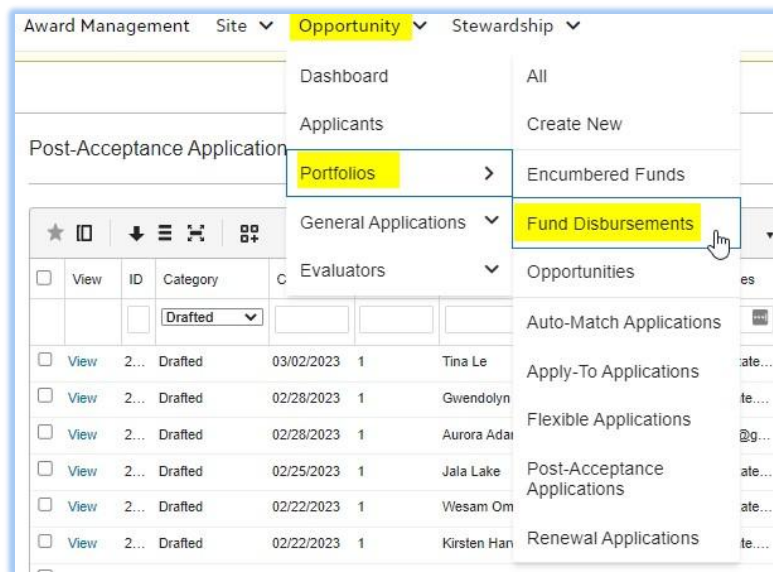
Enter the email subject, body of your email, then click *Send Emails*.



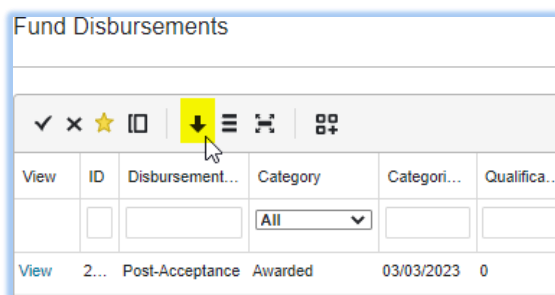
Disbursement Reports

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

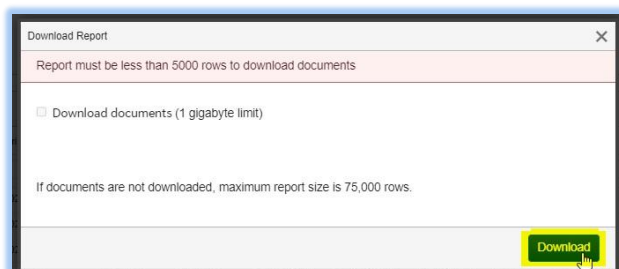
1. To download a Disbursement Report, click *Opportunity>Portfolios>Fund Disbursements*.



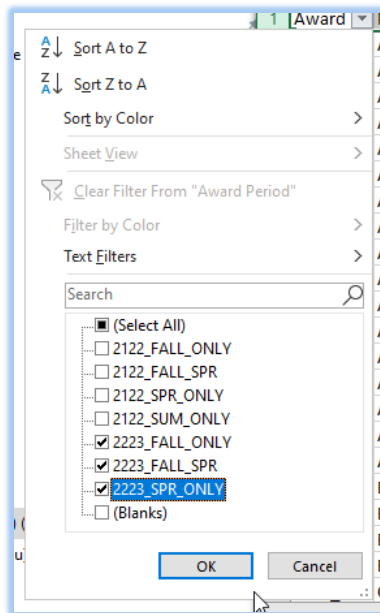
2. Click the download icon.



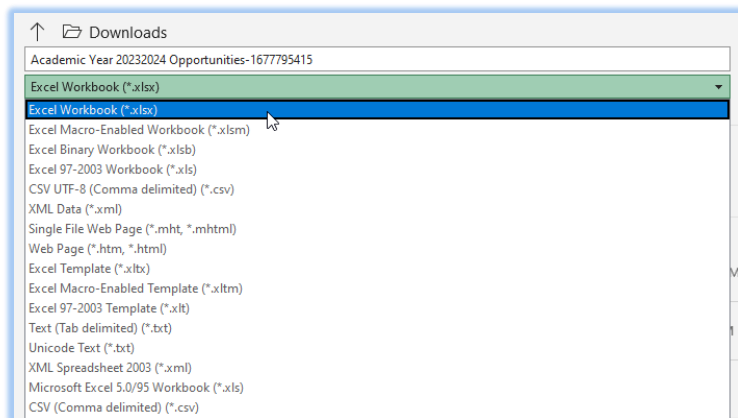
3. Click *Download*.



4. Sort and filter as needed.

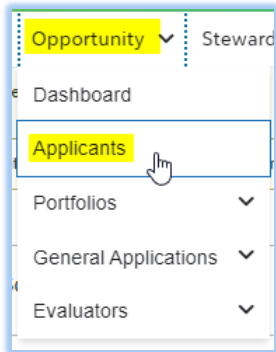


5. Make sure to save as an Excel Workbook. If you leave the file as a CSV file type, your edits to the spreadsheet will not be saved.

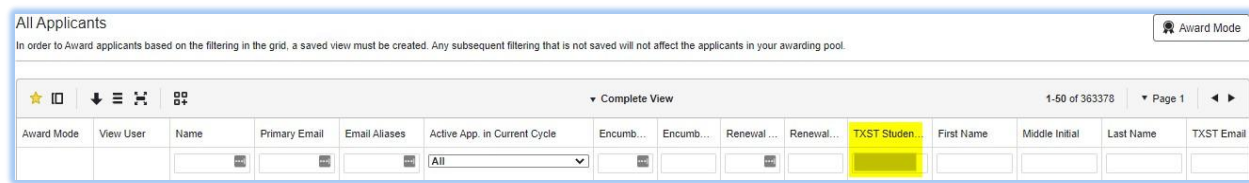


Viewing Log of Emails Sent to Student

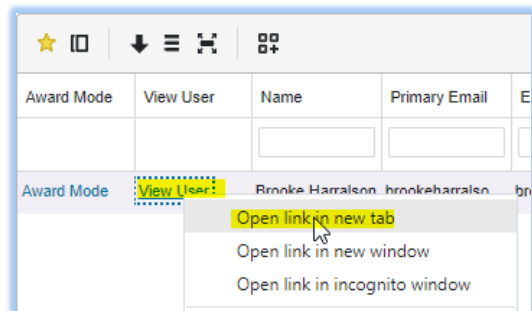
1. To view the correspondence that was sent to students, click Opportunity>Applicants.



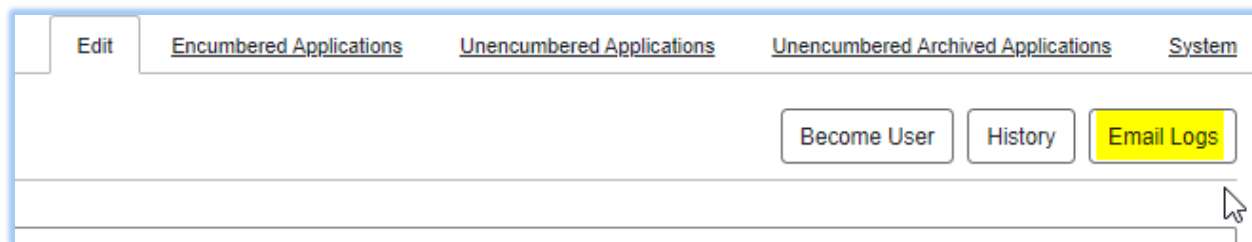
2. Enter the Student ID number and hit Enter.



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](#) which outlines important dates from the beginning to the end of the scholarship cycle.

BOSS Set-Up Form

Complete the [Bobcat Online Scholarship System Set-up Form](#) and submit online to get this account set up in BOSS. The BOSS system can be utilized as either,

1. An awarding tool where an awarding department can make offers to students and the student is instantly notified and it also automatically notifies our office, or
2. Utilize the scholarship application and/or committee review functionality as well as make award offers

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.

Students Enrolled in Online Programs

Please note, students enrolled in [Accelerated Online Degree Programs \(AOP\)](#) are not eligible to apply for competitive scholarships via BOSS.

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) 408-4441 (Teams)

For general BOSS and scholarship questions, please email Scholarships@txstate.edu or contact:

Stephanie Lopez

Director

Financial Aid & Scholarships

Direct Line: (512) 245-7728

Jamie Leonard

Supervisor

Financial Aid & Scholarships

Direct Line: (512) 245-2745

Sophia Capps

Scholarship Program Specialist

Financial Aid & Scholarships

Direct Line: (512) 245-7918

Katherine Odam

Scholarship Program Specialist

Financial Aid & Scholarships

Direct Line: (512) 245-3193

For student questions, please direct students to the TXST One Stop: [One Stop Webform](#) or by calling 512-245-TXST.