

Product Webinar Scholarship Automatch

Agenda

- Review overall functionality of akoyaGO's Scholarship Automatch feature
- Set up Scholarships, criteria and GOapply Settings configuration for Automatch
- Demonstration
 - GOapply Automatch – Student Opt in
 - GOapply Automatch – Automatic Opt-in
 - Scholarship Automatch in akoyaGO
- Processing Requests/Requested Scholarships in akoyaGO

Automatch Feature Overview

- **What is Scholarship Automatch?**
 - General Scholarship Application that includes all questions needed to match student with scholarships
- **Key benefits for foundations, applicants, and reviewers**
 - Easy to maintain/update
 - akoyaGO supported best practice
 - Gives the foundation options (Auto opt-in, Student opt-in, match in akoyaGO)
 - Requested Scholarship Records automatically created!
 - Works with other out of the box functionality
 - Scholarship specific Review Groups
 - Approve-Requested Scholarship button

Automatch Configuration in akoyaGO

Confirm Security Roles/Groups

- GOapply Admin Role (needed to access/edit GOapply specific tables)
- Gomanager Security Group (needed to launch Gomanager Form Editor)

Review General Scholarship Application (before building as Opportunity)

- Are all questions to determine eligibility currently included in your application? Do you need to add any questions?
- Are there existing **fields** in akoyaGO to capture all data that determines eligibility? Does a System Customizer need to create any fields?

Review GOapply Settings

- Automatch Enabled (on Settings)
- Automatic Opt-In
- Max Scholarship Opt Ins
- No Scholarship Match Text (Labels)

Scholarship Records

- Creating and editing Scholarship records
- Important fields:
 - Fund (works with auto-create payment functionality)
 - Opt In Enabled
 - GOapply Settings
 - Criteria Builder
 - Testing and validating criteria

Building the General Scholarship Opportunity/Phase

- **Creating the General Scholarship Opportunity**
 - Opportunity Type = Individual
 - Request Type = Scholarship
 - GOapply Site Settings = Set to correct site (if you have multiple)
 - Automatch Enabled = Yes
- **Creating the General Scholarship Application Phase**
 - Mapping eligibility questions to criteria fields
 - Ensuring all determinants are captured in the application form

Scholarship-Specific Questions/Requirements

- Form Builder on Scholarship record
- When to use scholarship-specific forms
 - Essays or uploads needed for specific scholarship
 - Additional questions needed for specific scholarships (that do not determine eligibility)

Student Opt-In

- **Matched Scholarships page**
 - Scholarships with Additional Requirements
 - Complete Application Button
 - Opting Out
 - Max Scholarship Opt-In
 - Submit All button
- **Status in GOapply UI: Eligible, Opted In, Opted Out**
- Requested Scholarship records will be created with a status of “Opted-in” or “Opted-out”

Automatic Opt-In

- Matched Scholarships page
 - Scholarships with Additional Requirements
 - Complete Application Button
 - Submit All button
- All Requested Scholarship records will be created with a status of “Opted-in”

Scholarship Automatch in akoyaGO CRM

- No Matched Scholarships page in GOapply UI
- Request created upon submission; no Requested Scholarship records created
- Scholarship Automatch button (in akoyaGO CRM – Request record)
 - All Requested Scholarship records will be created with a status of “Eligible”

Scholarship Specific Review Groups

- **Setting Scholarship on Review Group**
 - Reviewers will see Scholarship specific additional questions/uploads
 - +Add Pending Requests button
 - Adds Pending Requests in bulk with a related Requested Scholarship in a status of Opted-In
- **Adding Manually from Requested Scholarship**

Processing Requested Scholarship & Requests

- Enter Awarded Amount on individual Requested Scholarships
 - From Request OR from Scholarship
 - Status Reason updates to Approved
 - Enter \$0 if you are not awarding the scholarship
- Approve Request using button *Approve - Requested Scholarship*
 - *Original Grant* populates with total amount
 - Individual Payments created
- Process Payments

Where Can I Find Additional Related Resources?

<https://gosupport.powerappsportals.com>

[GOsupport Portal](#)

[GOapply - Scholarship Automatching](#)

[GOapply - Scholarship Automatching Webinar](#)

[Match Scholarships on Request](#)

[EMPOWERED 2024 - GOapply Scholarship Processes](#)

[CRM Standard User Roles](#)

[GOapply Permissions - GOManager Group and GOapply Administrator Security Role](#)



Thank you!

