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# DETAILED MEETING RECAP: SCHOLARSHIP AUTOMATCH WEBINAR

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## Overview

- The meeting focused on the Scholarship Automatch feature in akoyaGO, explaining its benefits, setup, and usage for both students and administrators. The session included a step-by-step demonstration and addressed common questions and challenges. 2:23

## 1. Understanding Scholarship Automatch

- Automatch allows students to fill out one general application, which matches them to eligible scholarships based on their answers. This eliminates manual branch logic and is easier to maintain than previous methods. 3:57
- Automatch creates "requested scholarship" records, linking students to scholarships for tracking and review. 5:17

## 2. Preparing for Automatch Setup

- Review your general scholarship application to ensure all eligibility questions are included (e.g., GPA, ACT score, extracurriculars). 7:58
- Make sure each eligibility question is mapped to a field in akoyaGO. Use out-of-the-box fields for common criteria, and create custom fields for unique requirements. 8:55

## 3. Configuring GOapply Settings

- Go to the GOapply area in akoyaGO and select "Settings."
- Enable Automatch for your site by setting "Automatch enabled" to Yes. 10:16
- Decide if students should be automatically opted in to all eligible scholarships ("Automatic opt-in" Yes) or allowed to choose ("Automatic opt-in" No). 10:35

- If opting in is optional, set a maximum number of scholarships a student can opt into ("Max Scholarship Opt-ins"). 11:51
- Customize the "No scholarship match text" to display a message if a student does not match with any scholarships. 12:35

## 4. Setting Up Scholarship Records

- Ensure each scholarship has a record in akoyaGO.
- Link scholarships to their respective funds for payment processing. 14:13
- Set "Opt-in enabled" to Yes for scholarships to be included in Automatch. Set to No for standalone scholarships. 15:08
- Build eligibility criteria for each scholarship using the criteria builder (e.g., GPA  $\geq$  3.5, ACT  $\geq$  20). 16:18
- Use the "Requirements" field to describe criteria in plain language for easy reference. 17:12

## 5. Creating the General Scholarship Opportunity

- In GOapply, create a main scholarship opportunity with type "Individual" and request type "Scholarship." 20:53
- Link the opportunity to the correct GOapply site.
- Set "Automatch enabled" to Yes for this opportunity. 22:14

## 6. Adding Scholarship-Specific Questions

- For scholarships needing extra questions (e.g., essays), use the Form Editor tab in the scholarship record to add these. Only students who matched with that scholarship will see these questions. 24:13

## 7. Student Application Process

- Students log in and complete the general application.
- If "Automatic opt-in" is No, students can select which scholarships to apply for and complete any extra requirements. 26:08
- If "Automatic opt-in" is Yes, students are automatically considered for all eligible scholarships and must complete any extra requirements before submitting. 34:19
- Students must click "Submit All" to finalize their applications. 27:25

## 8. Reviewing and Processing Applications

- Requested scholarship records show which scholarships each student is eligible for and their opt-in status. 32:14
- Review groups can be set up for each scholarship, allowing reviewers to see only relevant applications and scholarship-specific questions. 39:14
- Use the "Add Pending Request" button to bulk add eligible applications to review groups. 39:47
- Reviewers score applications; scores are unique per scholarship if students apply for multiple. 52:16

## 9. Awarding Scholarships and Payments

- Approve or deny requested scholarships by entering award amounts. Approved scholarships automatically generate payments linked to the correct funds. 43:10
- For multi-year or split payments, manually edit the payment records after approval. 44:53

## 10. Handling Ineligible or Withdrawn Applications

- If a student is found ineligible after matching, deactivate the requested scholarship record. 47:39
- Students can change answers or opt out before clicking "Submit All," but not after. 45:57

## Best Practices

- Require all necessary eligibility questions in the general application.
- Use custom fields for unique criteria.
- Consider limiting opt-ins if many scholarships require extra essays.
- Use review groups for efficient processing and scoring.
- Manually manage multi-year payments and ineligible applications.

## Support and Resources

- PowerPoint slides and related knowledge articles will be available on GOsupport.
- Check [GOsupport events](#) for upcoming webinars and user groups focused on grants and scholarships. 55:26