

January 2026 User Group - Scholarships in akoyaGO



Addie Kelzer 1:01

Hello, hello, welcome everyone. Great to see you all. We're going to continue to let a couple of people trickle into the room or join us throughout our call today. But let's go ahead and get started with our first user group of 2026. This is a.



Sanjana Raghavan 1:04

Hi, friends.



Addie Kelzer 1:21

Special edition for scholarships. So really holding some space, as many of you have asked for, for a discussion about scholarships with your peers at a time when most of you either have open cycles.



Monica Bouman 1:23

Yes.



Addie Kelzer 1:36

And are actively taking applications or you're preparing to open those cycles to applicants. So appreciate you being here. My name is Addie Kelzer. I'm the Manager of Client Experience here at Akoya Go. As you know, I always have colleagues on the line both from account management and from our product team. We're mostly just listening in.

So a couple of quick reminders for you as we start our user groups for 2026. I'm going to have you introduce yourself using the chat feature. If you don't mind listing your name, your organization, if you'd like to share the role that you serve at the organization, I think that can be helpful.



Karen Nichols 2:15

No.




Addie Kelzer 2:16

Helpful to know kind of what angle you're coming from with your questions. And then also just a fun thing to continue to get to know each other a little bit better. If


you have a really big win or even a small win from 2026, something that your team is really proud that they accomplished in 2026, we'd love to share in those.

 **Mindy Eggleston** 2:33
Yes.

 **Addie Kelzer** 2:35
Those wins with you. So please in the chat name, organization, role and something you're excited that your organization accomplished in 2026. OK, couple reminders before we get kicked off here and I open that up for questions.
First of all, the purpose of this meeting is mostly about peer-to-peer networking and knowledge sharing, amongst other Okoya Go and Go Apply users, and in particular for this space scholarships. Product specific questions can be raised, but the focus really is on that collaboration.
Leaning on each other in the room to help find the answers and then if needed we can chime in from a staff perspective. If you have a question that's pretty specific, that's a little bit of a flag that it might be support related, but if it's not, I would say get your example.
Ready because if we need more information or others are asking questions, it's helpful to have that record up and in front of you and possibly maybe ready to share if need be.

 **Kelly Nelson** 3:33
And.

 **Monica Bouman** 3:36
OK.

 **Addie Kelzer** 3:45
We'd also would encourage that if you have the opportunity to turn your cameras on with us today, I think that does continue to improve the relationships in the room and also we don't get to be in person very often for user group, so it's just nice to see everyone.
And then I think that's most of what I'll share, other than that I didn't have any scholarship specific questions in the forum to get us started today. So we will just go

ahead and open it up. Who has their first question for your peers that are operating? in the scholarship space in either Akoya Go or Go Apply. The floor is yours, or you can raise your virtual hand and get in line.

All right. Anne, thanks so much for kicking us off today. Go ahead and pose your question for the group.

AH **Anne Horst Hanby** 4:56

Sure.

I was wondering if those who are using scholarship, if there are some who are using scholarship auto match and if you would like to share about what is working well and how you're managing that in your particular.

System here as we're getting towards, you know, spring season.

That's not very specific. If someone else has more specific question, that's fine.

 **Addie Kelzer** 5:28

No, I think that's great. We definitely have some auto match users who dove right in. Can anybody on the call share their experience?

LF **Laken Fraime** 5:50

We just got through our scholarship application process and I will say the auto matching worked really well. Initially it when the students entered the correct information, it did work well. Once we got to the end of it, we had some issues as far as submitting and things like that, but I think that's going to be 6 foot to buck. Update on January 22nd, so overall it was it did go, did go well.

 **Addie Kelzer** 6:19

Great, Lincoln. Thank you.

AH **Anne Horst Hanby** 6:22

So you had a cycle closed already, it sounds like.

LF **Laken Fraime** 6:26

We did. It closed on December 15th, so I'm working on getting it in review right now.

DB **DeLayni Brown** 6:34

Can I ask how you're setting up those review groups for auto match? If it's like do you make review groups based on each like application or kind of how you do that?

LF **Laken Fraime** 6:39

Yeah.

I do, Yep. Each application has its own review group and I just found today it's going to be really nice, but I can Add all of them at once by a little button on the review group. So I'm really excited about that once I get to that point.

 **Addie Kelzer** 7:00

8.

Anybody else have their auto match maybe in progress still setting it up but not fully launched that can offer any feedback for Anne?

ME **Mindy Eggleston** 7:11

Addie, mine's in progress and again, like the other person mentioned, if the student puts in the correct information, it seems to be working great.

You know, I did receive an e-mail from a couple of students that said, well, I wanted to match with XY and Z, but they put, you know, that they were in business and the scholarship is for a future teacher or something. So it does appear to be.

Doing everything I want it to. Ours is not due until March 1st, so we're right in the middle. We've had several successful applications. You can see hundreds of kids working on it.

It seems to be doing what it's supposed to.

JP **Jennifer Phillips** 8:04

OK.

KN **Kelly Nelson** 8:08

I started using Auto Match last year when we started using Go Apply. I have 350 different scholarship funds, so I really really had to utilize the Auto Match because each of our scholarships are set up for a specific school.

So I my auto matching I use. If the student doesn't put in the correct school, they're not going to get auto matched to the the correct scholarship. But as you've all said, if

they don't put in the correct information, they're not going to get auto matched to those specific scholarships.

 **Jennifer Phillips** 8:47

Thank you.

I would just like to say, Annie, that this is our third year using the auto match feature for scholarships. Our window just opened up the other day. The ones that are coming through so far are working beautifully.

I have had to reach out to Claire Martin a couple of times for some issues that we've had, but she's responded beautifully to me and she's got me up and going. The only question that I do have, and maybe somebody here knows if you can or cannot fix it, is I had one applicant.

Fill out her application, but she's not getting her emails because she put insteadof.com she put dot COB and so she didn't get the emails that she had submitted and I don't know if there's a way that I can go in and fix that for future.

 **Meghan Davignon** 9:39

That when she registered, that was the e-mail that she used or in the form itself?

 **Jennifer Phillips** 9:43

She used the correct e-mail. She she used the correct e-mail to register, but when she put her e-mail address in the application itself, I believe that's the one that the e-mail goes back to and she put CLB.

 **Meghan Davignon** 9:58

So you should be able to resolve that in the CRM contact record associated with our application just to update it to the correct value and then moving forward she shouldn't have that issue any longer.

 **Kelly Nelson** 10:00

1263.

 **Jennifer Phillips** 10:10

So she has a contact record in the CRM.



Meghan Davignon 10:14

Yes, for a submitted scholarship application there should be a contact for the individual applying and that as I imagine where you would find that misspelled e-mail address.

So.



Jennifer Phillips 10:25

OK. So just go in and fix it there. OK. OK. Thank you so much.



Meghan Davignon 10:27

Yes.



Carrie Herman 10:33

This is Carrie at Barberton Community Foundation. We we switched to auto match this year. Our application doesn't go live until this Friday. So and we we had a a big issue last year with submitting and somebody at the beginning of this conversation. Mentioned a little hiccup with submissions and and that there's a bug fix or something and I'd like to know a little bit more about that so we can be. Prepared if we have a hiccup too.



Meghan Davignon 11:10

Yeah, so the bug is essentially what happens when the users are submitting. There are several processes that get kicked off, and so we're running into a race condition in some in some instances, not all. It's a small percentage of submissions where two processes are trying to do the same thing at the same time, and then it will cause it. To get stuck in processing, we can simply resubmit it in order to get that to go all the way through 9 times out of 10. But our bug fix next Thursday is gonna add some automated retries to make it so that you don't have to manually resolve those.



Carrie Herman 11:47

Great. Thanks for that info. So bug fix next Thursday might be helpful. Thank you.



Meghan Davignon 11:49

Mhm.

Yes.

 **Monica Bouman** 11:57

Right.

 **Chamika Ford** 12:02

Hi. So yeah, so I have a question. So we we actually have 255 scholarship funds with their individual criteria. I hear a lot of you are using the auto match. I just wanted to know when we first started, we set up views for every single one.

 **Addie Kelzer** 12:02

All right, Chamika, go ahead.

 **Chamika Ford** 12:21

Of our scholarships and we use that to match students on the back end. What are the advantages of using auto match and you know, in contrast using views?

 **Meghan Davignon** 12:38

I can answer that if no one else wants to. I like to defer to the other clients before I chime in. So with the views you can see all of the qualified applicants, but with Scholarship Automatch, it's actually going to add a requested scholarship record to the request.

So if I submit one universal application and I qualify for five scholarships, you're going to see those five scholarships automatically listed on my request record. And then that functionality also plays into the reviewer portal, so you can use that to automatically create review groups per scholarship. So it's just helps to facilitate that process and hopefully remove a lot of stuff.

you might be doing manually right now.

 **Chamika Ford** 13:17

OK. And we don't, we don't review per scholarship either. So, OK, thank you.

 **Meghan Davignon** 13:20

OK.

Mm.

I was gonna offer I think I might have to test this. I think you could copy the fetch XML from your views into the criteria builder on the scholarship so you wouldn't have to rebuild those criteria. I think you could just copy paste. I might need to test that to make sure cause I.

 **Chamika Ford** 13:33

Mm.

 **Meghan Davignon** 13:42

That would be a a bit of work to rebuild all those, but I think there might be a faster way if you already have views stored.

 **Chamika Ford** 13:48

Um.

And then the student can see the scholarships that they're matched to on their applicant portal as well.

 **Meghan Davignon** 13:54

We have both options, so you can display the list of matched scholarships, and if you do that, you can choose to either let them opt in or out, or you can automatically opt them into all, or you can have them submit through Go Apply without using the Go Apply auto match. And then there's a button you can use to run the process. Process and CRM directly. So if you're just evaluating criteria, you don't want to show that to the students. There's a secondary process you can run in Akoya Go after they've submitted to do the same thing.

 **Chamika Ford** 14:26

Nice. OK. Thank you.


 **Meghan Davignon** 14:28

Mhm.


 **Addie Kelzer** 14:29

There is some confirmations of that in the chat where their users Meghan have copied that fetch fetch XML.


 **MEGHAN DAVIGNON** 14:36
Great.

 **ADDIE KELZER** 14:41
All right, Mindy, go ahead.

ME **MINDY EGGLESTON** 14:46
I don't know if other people are using the third party application, but I I'm kind of waiting on a bug fix. I'm wondering if it's going to be in the next Thursday as well. So if you use the.
Scholarship recommendation request out-of-the-box. It asks for two recommendations, but when the people are uploading their recommendation, it's naming both of them recommendation and it's.
Erasing like the second person that uploads will erase the first person's letter of recommendation and um.
They said that they were on it, but I haven't really heard anything lately.

 **MEGHAN DAVIGNON** 15:38
Sorry, Marni and I are sidebarring about that, Mindy, because I'm not sure what the date is on that. The cause of it though, it's related to the question naming in the form. So a way that you can avoid this, especially for those who haven't opened their cycle yet if you have more than one recommendation.

ME **MINDY EGGLESTON** 15:47
Right.

 **MEGHAN DAVIGNON** 15:54
Make sure that the question name for your two recommendations are distinct, and if they are, that will help to avoid this problem. It also somewhat matters, I think, what your document file naming settings are in the Go Apply settings on your settings record.

ME **Mindy Eggleston** 16:13

We have it set up to name whatever The thing is, but when you go into the form builder, you can only build one form for the recommendation, so.

 **Meghan Davignon** 16:23

Oh.

Right. So what? But when you insert that form, so if you're inserting it, let's say you have one recommendation form and you're inserting it twice because they need to upload 2 letters of recommendation, the panels, no.

ME **Mindy Eggleston** 16:35

Nope. Um, ours is. It just asks for an e-mail.

 **Meghan Davignon** 16:40

No, in the builder, I mean when you're building the form, when you so you have built your recommendation form and then you have to add the recommendation form to the application, right? You have to insert it into the application where you want them to submit their recommenders data.

ME **Mindy Eggleston** 16:41

It's it.

Yes, but it only comes in.

It comes when you pull the thing over, it has the two. Um, like you can't. At least I don't know that I can edit it.

Like it it was a out-of-the-box question from.

 **Meghan Davignon** 17:15

Uh, Mark.

 **Addie Kelzer** 17:15

Would it be helpful?


 **Meghan Davignon** 17:18

Yeah, what we've seen is it's if you insert the same recommendation panel twice, it's


naming both panels exactly the same by default, which we don't want it to do. They should. Each question should have a distinct name, so that's what's causing the bug. Marni is testing now to see to confirm that you should be able to rename one of the panels.


Um, but also when you insert it, it should default to a unique name, so that would be the bug that we would resolve.

 **Mindy Eggleston** 17:45
OK.


 **Addie Kelzer** 17:47
This would be in the application itself in the form builder when you bring in the panel for the question about the recommendation. OK.

 **Mindy Eggleston** 17:47
OK.

 **Meghan Davignon** 17:49
In the form builder, right?
Exactly. So this is a concern only if you have more than one recommendation per form.

 **Mindy Eggleston** 17:56
OK, OK.
Okay, um.
They they have my case marked as solved waiting for a bug fix, but I'm wondering if I could change that and maybe somebody could help me so.

 **Meghan Davignon** 18:12
Mhm.

 **Addie Kelzer** 18:18
So Mindy, if you want to go to that area during this call, I feel like maybe we could even circle back toward the end of the call once you have that form builder open for

the application where you're pulling in that panel. And then if you need a little assist on how to rename that question, I think that'd be a good luck.

 **Mindy Eggleston** 18:22

Mhm.

Mhm.

 **Addie Kelzer** 18:38

learning opportunity probably for everyone, especially ahead of launching.

 **Mindy Eggleston** 18:41

OK.

So do you want me to unpublish my application and open it up to show everybody?

 **Addie Kelzer** 18:53

Yes, but I will give you some space and time to do that, Mindy. Let's circle back.

 **Mindy Eggleston** 18:54

OK.

OK.

OK.

 **Addie Kelzer** 19:01

OK, awesome. So if you want to just raise your virtual hand whenever you feel like you're in that spot, and then we'll work that in.

OK, great. Admittedly, there's a lot going on in the chat that I'm not keeping track of.

So if you place the question in there, you may raise your virtual hand and we'll get to it. Josh, go ahead.

 **Josh Jaeger** 19:24

I have a question about criteria builder if we're ready for a new question.

 **Addie Kelzer** 19:29

Yeah, go ahead.

 **Josh Jaeger** 19:30

So I'm gonna oh, I can't share my screen. Can I share my screen real quick?

 **Addie Kelzer** 19:36

Yep, please hold.

 **Josh Jaeger** 19:38

Sure.

 **Addie Kelzer** 19:47

OK, why am I not finding you on my list?

 **Josh Jaeger** 19:53

I'm not on the top.

 **Linda Tibbetts** 19:55

I did it, Addie. He should be able to share.

 **Addie Kelzer** 19:55

Oh my gosh, you did OK. I can't. I can't. It goes in and out to you were being added by Linda. Thank you. You should be able to share now.

 **Josh Jaeger** 20:04

Yes. OK. So here in Criteria Builder, we've got choice fields that I've been doing differently from what I'm hearing might be the general consensus on how to. Choose make more than one option a qualifying factor for auto match. I always thought that when you went into the choice thing, if you added all of these, then the IT would be trying to match against any student that said yes, I go to all of these schools.

So an and condition as opposed to an OR condition and but I'm hearing that there are some folks for whom this is being treated. The system is treating this as a an OR grouping. So we choose what we do is we just add rows and then choose only one choice for each and create an OR grouping.

Because it's super explicit and visible and we can just see it. But I'm curious though.



Meghan Davignon 21:02

So yeah, I can't say with 100% certainty, but I can tell you when you build a view in Dynamics and you have a choice field, if you select multiple choices, it treats that as an or any of those can be true. Now the criteria builder is a third party control. I assume it works the same.



Josh Jaeger 21:15

Whoa.



Meghan Davignon 21:21

Same way, but I would have to specifically test that to confirm. If anyone else on the call knows the answer for sure, feel free to chime in.



Josh Jaeger 21:32

Good to know. Thank you.



Grant Cox 21:35

From my test with that, it's been treated as an or.



Josh Jaeger 21:36

Star.

Wow, with the criteria builder.



Addie Kelzer 21:39

Okay, thank you.



Grant Cox 21:43

Yes.



Josh Jaeger 21:43

Excellent. Thank you. I've been advising people incorrectly for quite some time.



Addie Kelzer 21:50

It happens.



Meghan Davignon 21:53

Your method also works, it's just more clicks, but it's, you know, still gonna give you the same good result.



Addie Kelzer 22:00

H.

Great. Thanks, Josh.



Anne Horst Hanby 22:05

Would there be any way to mark that in the system so that you can see if it's and or or?



Meghan Davignon 22:10

I don't know that there is any way for us to change how that's displayed again cause that's like the built in dynamics filter builder and then a third party version of it. I don't know that we can modify how that looks to the user unfortunately.



Anne Horst Hanby 22:25

OK, so just instructions or tooltip or something?



Josh Jaeger 22:29

Yeah, to piggyback on that question that Anne just rightly asked, I wonder if if there isn't any currently could or should there be some documentation that includes a little bit more explicit explanation of how those fields work, certainly in views, but also in criteria builder.



Addie Kelzer 22:48

Yeah, agreed. Cause I know that many of you that are building criteria are using our documentation closely. So my assumption is that it's not explicitly laid out, so we'll get a documentation request in to add that.

Great.

All right, Kristen, go ahead.



Kristen Kohn 23:09

Hi I had posted a question in the forum so I thought I'd just bring it here as well and see if there was any feedback from this group. I am using Simple Form Builder for my application. I have used it and I'm using out-of-the-box.



Addie Kelzer 23:15

OK, great.



Kristen Kohn 23:26

Extracurricular activities field, the work experience and the community service field. These are when inserted into the application, they are text fields and so it doesn't allow for any formatting.

I have within the application other questions that are rich text fields, so students have experienced some the option to format their text and so with these.

Fields. I've been receiving some feedback from students asking how should I be putting in my information? Should I be using commas? Should I? How should I space out, you know, my list of extracurriculars? That sort of thing. My primary use for that data.

Is it's going to reviewers who are reading it in the application. There's not a lot of reasons for me to need to pull that data out, like to Excel or whatever. So um, for the purpose of.

Reviewers reading this, I'm wondering if any of you provide like additional guidance to applicants about how they should input their information or if you have found a solution.

That makes that data a little easier to read because it can get pretty messy. And I I put some screenshots in the forum if anyone wanted to see kind of like what it's looking like.



Addie Kelzer 25:06

Right.

And Kristen, if you have that forum open, you're welcome to re to copy and paste those photos into the chat for us to view. But just to clarify, you're not you're talking not about the rich text fields, you're talking about the single input.



Kristen Kohn 25:18

OK.

Yes, correct.



Addie Kelzer 25:28

OK, great. Anybody providing guidance to applicants on?

How to get that to come across? Wow. Easy to read for reviewers.

OK, so there are some photos in the chat of how it's coming across to reviewers.



Kristen Kohn 25:53

Yes, the first image is how it comes into the CRM, and the second is what it looks like for a reviewer.



Addie Kelzer 26:09

Amanda, if you have a comment on this topic, feel free to go ahead. Otherwise, if your question is separate, I'll come back.



Amanda Heubel 26:16

No, it's a comment about this. I don't know how much you want to get in to like changing this and it may very well obviously be a thing for next year because you're done or in the middle of your.



Addie Kelzer 26:18

Great.



Sharon Green 26:27

OK.



Amanda Heubel 26:32

Season, but we actually have like a checkbox, a checkbox list. So like you list all the sports and they can check off whichever ones that they do. And then there's also the.



Sharon Green 26:45

Why is this an issue for her?



Addie Kelzer 26:49

OK.



Amanda Heubel 26:50

And and then they have the other box. So you if it's something random like I saw hunting, they can put something like that in. But I would separate sports and community activities.

Separately.



Kristen Kohn 27:08

OK, so I think the other thing that maybe complicates this for me is I'm using these fields in Criteria Builder. So if I have a scholarship that requires extracurricular activities, then I have added.

Under that scholarship, you know this field contains data, so I guess then I would have to consider another way to utilize the criteria.

Uh, for matching that kind of ties me to these fields, I think, but I'm open to other ideas.



Amanda Heubel 27:46

Yeah.



Addie Kelzer 27:51

Thanks for that idea, Amanda.

Anybody else? Commas, hyphens. What do you got?



Elizabeth Whitehead 28:02

Thank you. Sorry, can you hear me OK?



Addie Kelzer 28:05

Mm-hmm.



Elizabeth Whitehead 28:06

We we are.

We do give some instructions sometimes about please format like this and giving

them an example. This is our first time doing it through Aquia, so I can't guarantee that things are going to work nicely that way. But we also our extracurricular activities are broken out like we first asked them, we do like an if then thing like do you have any extracurricular activities to add?

Yes. Then they tell us the name of the activity. How many years?

And then we have the system tally the number of activities. Um.

I don't know if that helps. So the system then counts the hours and the activities for us.

 **Kristen Kohn** 28:46

OK, that sounds more advanced than I would know how to, but I would be interested in learning how you've done that. That sounds kind of neat.

 **Elizabeth Whitehead** 28:56

Yeah.

I'm all for a little bit of.

 **Addie Kelzer** 29:00

What types of questions are those, Elizabeth?

 **Elizabeth Whitehead** 29:03

We do that for our extracurricular activities for our sorry, scrolling through our application, our community service. We do it for our work experience, but we keep that with our review groups because we couldn't find a way for it to tally all the different options we could consider for work experience for our kids nicely. Um.

 **Lisa Bates** 29:22

OK.

 **Addie Kelzer** 29:23

And those are text fields.

 **Elizabeth Whitehead** 29:26

No, we don't use text fields for, so we we do some different if then questions. Sorry, I

don't know all your all the lingo for that, but also our honors and awards. We create that in a in a list and leadership positions.

Yeah, we used a different format of questions that just open text field.



Addie Kelzer 29:45

OK.



Elizabeth Whitehead 29:47

Um.

Sorry, I don't know what these are all called for for you guys, but that.



Addie Kelzer 29:52

Do you have it up in front of you? Would you be willing to share what that kind of looks like on the back end? OK, give me just a minute and I'll make you a presenter.



Elizabeth Whitehead 29:55

Yeah, sure.



Linda Tibbetts 30:03

She's a presenter. I just did it. You bet.



Addie Kelzer 30:04

Thank you, Linda.



Elizabeth Whitehead 30:08

OK, let me see which one. OK, can you guys see this?



Addie Kelzer 30:13

Mhm.



Elizabeth Whitehead 30:14

So for our works, I'm gonna come up to so for community service.

We asked them if they have any and then asked them where it was the total hours and then we we asked them up to five times if they have more to add.

And then in the end it tallies it for us so that we know they have this many total

community service hours. And then that's the that's the question we score based on you know if it was zero to five hours or however you want to do it and then work experience we.

We have them listed like this and that's the one that our reviewers look at with us and then honors and awards.

We did the list this way.

Um.

I think leadership, but then in leadership we did have them kind of listed but but asked them to can you do it in this format for example first E soccer captain. So, so far that's working OK, but this is our first submission cycle with Akoya so.

We'll see how how those text fields end up working for us.



Addie Kelzer 31:24

Mm.



DeLayni Brown 31:28

Can I ask Elizabeth that that looks really great. I think that's a great way to do it in the when an application comes in, then like in the request record, does any of that logic track somewhere or is this mostly just so it's easy for reviewers to see?

When they like grade in a rubric style.



Elizabeth Whitehead 31:47

Um, you know what? I'll have to go in and look at some of my requests. You can all do that with me if you want.

I'm gonna come into our status tracking and find the one that we know is already in here.



Addie Kelzer 32:04

While you're getting there, Elizabeth, Kristen, I just grabbed some of the language that Elizabeth is using, like on the leadership question, which kind of is circles back to. If you're still going to continue to use the text input fields, she's at least given that format of how to list it before you go on to the next activity.



Kristen Kohn 32:26

OK. Thank you, Eddie.

EW **Elizabeth Whitehead** 32:26

And then where where are you wanting to see it in? You wanting to see it like here that we put it in here?

DB **DeLayni Brown** 32:37

Feels like the right page. OK, cool.

EW **Elizabeth Whitehead** 32:38

It does pull.

Like this. Sorry, I pulled a college student and they don't put as much information on our application.

DB **DeLayni Brown** 32:45

We don't track a lot of it to our record yet, so I was just curious how people see that, what kind of boxes they. I don't think we have an activities box, so that's something new for us to consider.

 **Addie Kelzer** 32:45

Mhm.

EW **Elizabeth Whitehead** 32:46

But.

 **Addie Kelzer** 33:02

This is great to see you. Thank you so much for sharing. I think that happens a lot, especially if you've customized your form or done something unique. When we talk about it, it's hard for a lot of us in the room to actually.


Conceptualize it to picture it. So sharing is really helpful cause I think you blew a couple of people's minds or at least got something started in the background of what could be done. So awesome work there.


EW **Elizabeth Whitehead** 33:31


I cannot take credit for that. If you wanted any information, you'd really have to talk to my coworker, Anna, who's the mastermind behind our building. But this is also


why we're a little leery about switching to auto match, because we didn't feel like all of that.


 **Addie Kelzer** 33:38
Cool.

 **Elizabeth Whitehead** 33:43
In in our brains, we couldn't figure out how that went, transferred over nicely, so that's where we could use help maybe.

 **Addie Kelzer** 33:54
Great.
Right. Uh oh, you're being volunteered to present at Empowered. We'll put out calls for presenters here. Not too long, so be ready. All right. Who else has a question, either in the chat that I have not circled back to or just getting started in your brain?

 **Mindy Eggleston** 34:32
Addie, I'm ready whenever you are to circle back to mine, but.


 **Addie Kelzer** 34:34
Oh, wonderful. Great. Mindy, go ahead. I think I need to make you a presenter. All right, you should have the ability to share now, Mindy.
So I'd love to see is another user who's comfortable in form builder offering the solution for how to rename here just so we can use rely on our users first.

 **Mindy Eggleston** 35:16
So ours.
Now mind you, I've been doing scholarships since version one, so I've never changed this part. I've used what Akoya gave me, so on my application.
I just dragged the box and I do have it named different like letter of recommendation one. It asks first name, last name, e-mail, relationship and then they can write a note and then when they press submit.
It sends an e-mail to the user. So then I was told that I.
needed to make um
A different form, so like.


If you go in here, you have a recommendation form editor. Are you still seeing my screen? OK, so then I built. I built it here. So when?


 **Addie Kelzer** 36:14
Mhm.


 **Kristen Kohn** 36:14
Yep.


 **Mindy Eggleston** 36:22
The e-mail gets sent, the person gets this, so everybody gets the same thing. Well, I named it.

 **Meghan Davignon** 36:25
Mhm.

 **Mindy Eggleston** 36:32
Um, recommendation, so I don't.

 **Meghan Davignon** 36:34
So this shouldn't matter. Nothing in the recommendation form directly should matter. It's on the application form where you inserted it. That's where we're curious about the naming. So I saw you had that first panel was called like LOR one and just out of curiosity for #2, is that called LOR 2?

 **Mindy Eggleston** 36:40
OK.
OK.
Yep.
Yep.

 **Meghan Davignon** 36:52
It is OK, so I actually tested this bug, but I totally forgot all of the results. So what we found in testing was that regardless of your setup.



Addie Kelzer 36:53

Mhm.



Mindy Eggleston 36:54

Yeah.

OK.



Meghan Davignon 37:07

All of the recommendations should be able to be found on the status tracking record in the status tracking attachments. So the files are not lost, they're they're present, but where we see.



Mindy Eggleston 37:14

They are. Yep, I can. I can do that. But it's a pain, so.



Meghan Davignon 37:19

So where we see issues is the movement of those into the request folder where the naming is the same and the name could be the same because you have it set to name it the question name and question names are the same or if you have it set to the user's file name.

Like if everybody wrote me letters of recommendation and called them Davignon recommendation, we're going to have a problem because those files all have the same name. So those are the scenarios that we're trying to solve for with the bug. That's not going to retroactively change data though. So I want to make sure we have a plan for you in the current cycle on how.



Mindy Eggleston 37:44

Right.

OK, OK.

OK.



Meghan Davignon 37:57

You're gonna be able to make those attachments available to all of your reviewers. So I would suggest that we make a note on your case that we should revisit for the

current cycle what our action plan is, so that when you get to that point, you are prepared.

 **Mindy Eggleston** 38:08

Good.

OK, um, Sarah did teach me how to go in and find them, so I'm doing manual work.

 **Meghan Davignon** 38:16

OK.

 **Mindy Eggleston** 38:21

And downloading it, giving it a very different name and then uploading it into the document section so that it comes up in the reviewer.

 **Meghan Davignon** 38:31

OK.

 **Mindy Eggleston** 38:32

So that that's how I'm solving it at the moment. But like, remember, I'm gonna get a few 100 applications to fix everybody.

 **Meghan Davignon** 38:35

OK, OK.

So I will just make a note to go back and review your specific settings, Mindy, to see if there's anything we need to do to make it easier because it, like I said, it varies a little bit based on the settings you have for your attachments, what our plan would be.

 **Mindy Eggleston** 38:47

OK.

OK.

OK, while I have this open I can show you. So I use a matrix and so for my extracurricular activities I have them list the activities, what grades or college they've participated.

Over here they can write any leadership roles. They can add a row um and I have

them do. That's how we accomplish it for ours.
So.



Addie Kelzer 39:30

Interesting. I'm glad you showed that while we were here.



Mindy Eggleston 39:33

So just a little different way to do it.



Addie Kelzer 39:35

Yeah.



Mindy Eggleston 39:38

So.



Addie Kelzer 39:38

Great. Thank you, Mindy.



Mindy Eggleston 39:39

Mm-hmm.



Addie Kelzer 39:44

Well, Kristen, you have no shortage of ideas here for next year anyway.

Great. All right, Josh, you have another question?



Josh Jaeger 39:56

I don't know if it counts as a question, but to dovetail off of what you just said, it seems like what I'm seeing in just this session is that there are infinitely many wildly different ways to build a scholarship application.

That we could all learn from if we had some place to like look at other foundation scholarship applications. I don't know what that looks like. I'm just ideating right now that it would be super cool if.

We could just like look over and even upvote different scholarship application structures or setups that foundations have and steal ideas from. Just throwing that out there for the groupthink.



Addie Kelzer 40:45

I love that. I love a good show and tell. Are more people interested in that? Like if the whole focus was you bring your application as it's set up, no judgments, just all here to learn and see how everybody else has built it, and then you'll go away within a bundle.

List it feels like of ideas for your next season. OK, let my team ideate on that a little bit because we are doing scholarships as kind of like a special session. We do plan to do at least one more this spring, just focus on scholarships.

So check back on go support events. Otherwise we will communicate through our monthly client emails as well once we get something like that set up. But I think that's a really unique way that we could really share.

Specific to applications form builder, OK.

OK, awesome. Look at you guys. You're so great. All right, Lexi, you have a question for the group.



Lexi Brown 41:57

Yes, thank you. I'm going back to the auto matching. So we have a general scholarship that students fill out and then we have the auto matching set up. So I'm just curious what is a best practice if a scholarship does not show up for the student?



Addie Kelzer 42:00

Great.



Lexi Brown 42:15

And you know, I they have like additional questions that they have to fill out for that specific scholarship. So I wasn't sure if anyone encountered this issue. And like what I've done is I just like it was for a college student and she just had like.

She needed two other scholarships she could apply for. So I just sent her the specific scholarship questions. But you know, if we get a student that has like 10 scholarships that did not show up, right? Like I wanna make sure that I know how to do that, so. I didn't know if anyone encountered the same problem, so.



Addie Kelzer 42:58

And Lexi, is this a problem of the applicant? Sorry, I was chatting with my team on

the side. It's a problem of the applicant not meeting the their answers don't meet the criteria that you have set up correctly. OK.

 **Lexi Brown** 43:03

Yeah.

Yeah, yeah. And this is like the first time that we've done the scholarship and the auto matching and everything. So it could have been like, yeah, it wasn't auto populating, you know, because maybe there was a criteria builder that was missing or something. I'm not, I'm not sure like, but for.

Um.

Yeah, I'm just, I'm just trying to think of the best way to kind of audit that as well, right. I don't want a student to miss out on the scholarships. I'm like, how can I audit also the ones that have already been submitted and make sure that they are able to access all the scholarships they can because.

We have like a PDF on our website so students can go to that and see like our whole list of of scholarships. So then that's why some of them have reached out because they're like, oh, this list says I could, you know, apply for the scholarship because it's through my high school, but.

It's not showing up. So yeah, it's kind of.

 **Meghan Davignon** 44:05

So the match scholarship screen, which is what your applicants see after their initial submit, here's everything you qualified for that is directly based on the requested scholarship records connected to their request. So if you add a new requested scholarship to that request, it will appear on that match scholarship.

 **Lexi Brown** 44:10

Yeah.

Yes.

Oh, OK.

 **Meghan Davignon** 44:25

Screen, so you should be able to manage that directly. But in terms of in bulk kind of re-evaluating to make sure that nobody got missed, this is an area where the criteria

builder might be helpful because you can view the results of that to see who all met those criteria and you should actually.

 **Lexi Brown** 44:33

Yeah.

In a view, OK.

 **Meghan Davignon** 44:45

I think be able to add a criteria for the related requested scholarships.

That might be harder because to do an inverse you can say like that they have none.

I don't know that we can like just filter for people who don't have that specific

scholarship that might might might be more difficult. So that might be a somewhat

manual process. I can tell you if you roll them back to in progress like fully back to in progress.

 **Lexi Brown** 45:03

Yeah.

Yeah.

 **Meghan Davignon** 45:09

And they update their answers and resubmit. It will re-evaluate and add new requested scholarships to their records. So the system will do it for you if you push them all the way back to the initial application.

 **Lexi Brown** 45:11

Yep.

OK.

OK, would they? Yeah. And that's what I thought I when I was actually gonna test that today with, um, like a test application that I submitted for myself. But um, would that? Would they have?

 **Meghan Davignon** 45:31

So that process will it will not remove scholarships from there. It's just like so there's something that they no longer qualify for because they change their answers. It's not gonna remove it, but it will add new ones that they match to.

LB Lexi Brown 45:36

OK.

Yeah.

Right. Yeah. OK. And would that, would they have to fill out the whole application again or would their general application save?

 **Meghan Davignon** 45:50

No, they will still have all their answers. They could just page through anything that they didn't need to change and then do the submit process again and they'll see the little waves saying we're matching you to scholarships. So and anything that completed on the match scholarship page would also still be stored. They wouldn't lose any of that.

LB Lexi Brown 45:52

OK, and then.

OK.

Yeah.

Okay, yeah.

OK, awesome. Yeah, that's what I figured that was it. But I was also nervous to do it cause I don't wanna lose their information and you know, so yeah.

 **Meghan Davignon** 46:13

We have had, we have had some issues with folks rolling back. So I just want to caution you, if you're going to do that, we've seen in some instances when you roll the student back to a previous status, they may have to uncheck and recheck the scholarships they want to opt into when they get to that match scholarship page. It's not going to remove any.

LB Lexi Brown 46:21

Yeah.

OK.

 **Meghan Davignon** 46:34

Any of their responses from their supplemental forms if they've done that. But in

order to activate that final submit button, they may have to uncheck and recheck. We're working on that. But just so you know, if you are going to do that, you may want to tell the students they may need to deselect and reselect the scholarships they want to be considered for.

LB **Lexi Brown** 46:53

Okay. Okay. Gotcha. Yeah.

Yeah, I think it's something with we like, you know, specific majors and then right, like it's within the criteria builder. It's hard to, you know, catch everything. But I also, I just, yeah.

 **Meghan Davignon** 47:07

It's so hard because yeah, a pick list is ideal, but you can't probably think of every possible scenario, right? So someone's gonna pick other and then need a text field and it's it's a tough task what you're doing. It's a lot of work.

LB **Lexi Brown** 47:17

Yeah, yeah. And yeah, yeah. And yeah, thankfully we haven't had anyone like say that a lot of their scholarships are missing. It was like one or two that they thought they may be qualified for and just wanted to make sure, you know, that they did qualify for it, so.

 **Meghan Davignon** 47:32

Huh.

LB **Lexi Brown** 47:34

OK, got it. Thank you. I will try that.

KK **Kristen Kohn** 47:39

I was just gonna add this is kind of related, but maybe the opposite problem. If you have a student who opts into a scholarship but then doesn't complete the additional requirements, they decide. Never mind, I don't want to do this essay, but they leave themselves opted in.

On the scholarship entity, it's quite easy to just switch their status to opted out, and

then you have cleaner data for when you want to move that group to a review group, so.

 **Lexi Brown** 48:08

Oh, yeah.

Very helpful. Thank you. Yeah.

 **Addie Kelzer** 48:18

Very good question, Lexi.

 **Meghan Davignon** 48:21

I will just offer, you know, I see that there's a request for documentation on like the troubleshooting and rolling them back. We are at Aquago are learning a lot about the troubleshooting needs in this first pass with auto match and so we are ideating on ways to make this easier and work smoother when you do need to go back and have them, you know.

Change information. So I commit to documenting that, but we want to make some enhancements to that as well. So just know that that for next round will be coming.

We're doing a lot of feedback processing right now from you folks, so.

Anything you run into, we love to hear your feedback.

 **Addie Kelzer** 49:04

Right.

Sanjana, you have a question for us?

 **Sanjana Raghavan** 49:09

Yes, this is the first time I'm asking a question. So I'm a little nervous that this may not be a great question to ask, but question is about auto match again and how do you create?

Ineligibility criteria for high moral character or financial need. I was struggling with that a little bit this time, so that's why we didn't use auto management with the regular.

Application this time.



Addie Kelzer 49:41

The questions about financial need and then you said high moral character.



Sanjana Raghavan 49:47

Mhm.



Addie Kelzer 49:48

So examples of.



Sanjana Raghavan 49:48

Because I was one of the that's one of the first criteria that the scholarship has. We usually judge it by in the past. What we've done is we've judged it by what the student has written because there's an essay component to it.



Addie Kelzer 49:54

Uh.



Sanjana Raghavan 50:04

And so I was kind of struggling with that a little bit this time.



Addie Kelzer 50:08

Mm.

Or others putting that on their application. I saw some nodding heads on to know, so I think you're on to something.



Sanjana Raghavan 50:13

OK.

So the SAI number, how do you? So if it is, if that's something that they're uploading or are you judging saying that certain number below a certain number?

Will need financial aid.

Please, I think.



Rita R. Goldberg 50:39

Hi, it's Rita. I actually created a custom field for SAI and net cost of college and I have

instructions in the application for those students to provide that in a field as well as upload their FAFSA form.

Form the student aid report from their college or SAR along with them calculating their net cost of college. And then this is a new field in our scholarship tab and it'll be something that we're able to.

Map directly to the database. Staff are able to view it, and each scholarship has its own sort of.

Framework for what is or isn't an appropriate level of need. Of course, with the SAI rolling out just only two years ago, none of those are sort of written down. It's all sort of, well, we like to see it, you know, between this amount and that amount. Caution on SAI because it is a negative.

SR **Sanjana Raghavan** 51:32

Mhm.

Yeah.

RG **Rita R. Goldberg** 51:44

Number is possible. You cannot use a format mask for a number. It has to be a text field, which if you are using calculations in your views, it's not going to work. So just a little caution SAI unlike previous scholarship FAFSA aid numbers.

Can be negatives or zeros, so the negative number messes up the fields, at least in theory, so I plan for that.

 **Addie Kelzer** 52:15

It tips Rita.

So I see several people in the chat chiming in about how they're collecting the report as an upload, but then also having the student enter their numbers.

Anybody else want to elaborate or show how you're collecting that? Go ahead, Lisa.

LB **Lisa Bates** 52:38

I was just gonna say we decided for our area a cut off amount because our high school committees that were deciding scholarships that have a financial need.

We just told them, hey you, because their students all have to apply through our common application, the cutoff is 30,000 or less on that SAI number. So if you send me your recommendations for a scholarship with.

A financial need and I see that they entered an SAI higher than 30,000, you need to go back to your committee or give me extenuating circumstances that they may not have included in their application for your reason for selecting that.
Student.

53:32

OK.

SR **Sanjana Raghavan** 53:37

To think about, I guess this year's already been launched, so we can't do anything about this year, but perhaps something for next year think about.

Where were you guys when we were trying to do all of this and could have talked it through?

 **Meghan Davignon** 53:55

For the moral character aspect, that is tough because it really I think requires a human touch to determine. So what I might recommend is not including that as an eligibility criteria and pushing it into the post submission review so that if someone does meet the other preliminary criteria that you.

SR **Sanjana Raghavan** 54:04

Right.

 **Meghan Davignon** 54:15

You could review those fields within their request or in the PDF, and then if you find that you don't think they meet that criteria, you can mark them ineligible for that one scholarship.

SR **Sanjana Raghavan** 54:25

Yeah, that's why, I mean, I was trying to figure out how we could do financial need because then that could be one of the criteria to sort of match them. So, yeah, thanks.

 **Meghan Davignon** 54:32

Mhm.

Yeah.

The good news is the robots are not going to replace all your jobs, right? We just they're not going to be able to do that. So we still need you.



Addie Kelzer 54:48

Great. We have time for one, maybe two more questions before we are done for the day. So let's sneak a couple in.

Go ahead, Jennifer.



Jennifer Phillips 55:05

This has to do with the reviewer portion. I know last year a lot of my reviewers were confused because when they look at the application, there would be blue hyperlinks throughout the application that they thought they could.

Click on to see the information.

And those blue hyperlinks didn't work. And a lot of that documentation on the blue hyper hyperlinks were what I would say attached as an attachment that they would have to download. And I thought I had heard in a product update that those attachments were going to now be listed at the bottom of the application so they wouldn't have to download them.

Is that true?



Meghan Davignon 55:46

They are listed in the attachments section, so there's now a dedicated section for the attachments where they can view them on screen so they don't have to download them.



Jennifer Phillips 55:57

OK, and do the do the blue hyperlinks work then?



Meghan Davignon 56:00

In the PDF, the hyperlinks are not clickable. That's dependent somewhat on PDF software and we've actually switched providers since then and still not clickable. But depending on the PDF software that you use, what I found as a work around and I don't know that this is meaningful for your users.

 **Jennifer Phillips** 56:04

OK.
OK.
OK.

 **Meghan Davignon** 56:20

Downloading that PDF in the downloaded version, depending on your PDF provider. Like if you use Adobe, they may be clickable in the downloaded version.

 **Jennifer Phillips** 56:31

Okay.

I know a lot of my reviewers are older individuals and a lot of them would click on the attachments and they would download to their computer and they had no idea where they went. They did not access them. So just.

 **Meghan Davignon** 56:43

Mhm.

 **Addie Kelzer** 56:45

Mm.

 **Jennifer Phillips** 56:49

Trying to see if it's maybe a little bit more user friendly for them this time around. Thank you.

 **Addie Kelzer** 56:57

Great. Thanks. Josh, you have one more quick question for us.

 **Josh Jaeger** 57:01

Yeah, just to dovetail on that, it it reminded me that you used to be able to see all of the attachments as a part of the PDF and then we moved to that other thing. Is there a ways that a product suggestion maybe to give the option to choose between the two? Because we do have some older folks that prefer to print things out to read

them instead of view them on screen.

Screen and without having to click on multiple attachments to download and print.



Meaghan Davignon 57:25

There's not an option for that right now, and part of the reason for this is because when in reviewer, when we open the view, like we select an application to view it, it's rendering, we say on the fly. So it's not a stored PDF anywhere. It's saying OK, here's the PDF of their application based.

On your selection of which questions should show to the reviewers and then the attachments. What we are working on, which doesn't have a release date yet but is on our our list, is a way to print the forms from the reviewer interface either individually or as a packet. So if they'd like to print.

All so that is a a future coming feature to make that easier. Probably not for your review cycles this year because we're approaching quickly, but by the next cycle.



Josh Jaeger 58:16

That's great. Thank you.



Meaghan Davignon 58:16

Mhm.



Addie Kelzer 58:19

Right.

So to close us out here today, I'm going to share my screen to make sure you all know about the upcoming events that we have scheduled up in Go Support. So today's scholarship user group is here. We'll be moving into our February regular rotation of user groups starting on the 3rd.

And then I also wanted to let you know about a event that we're designating as type of thought leadership webinar. So really an opportunity to come and learn. The details of this one are pretty robust. So I would recommend that you come in here to look at the topic specifically, but this will.

Also include some individuals from Inspiring Impact to have more of a comprehensive discussion about building unrestricted endowment funds. So looking forward to seeing you there or at some of the other user groups. Thanks to everyone. This was like a perfect example of how user groups are at their best.

Where we stay focused on really sharing ideas and ideating and our support team can work on your support cases separately. So thanks for submitting them there. Oh yeah. So there's a request to share the transcription along with the recording. I think we could do that for this one, especially if we want to make that a regular thing for user groups, we can look at that as adding that to our process. Is that generally the consensus that you would all like to look at the trans? Script also. OK, yeah, we can add that. It'll be a downloadable item next to the recording link, but if that's helpful to you, then I think we can add that to our process. OK, great. Thanks so much everyone for being here. We'll see you in February shortly.

● **Addie Kelzer** stopped transcription