

## How to Select Applicants for an Award

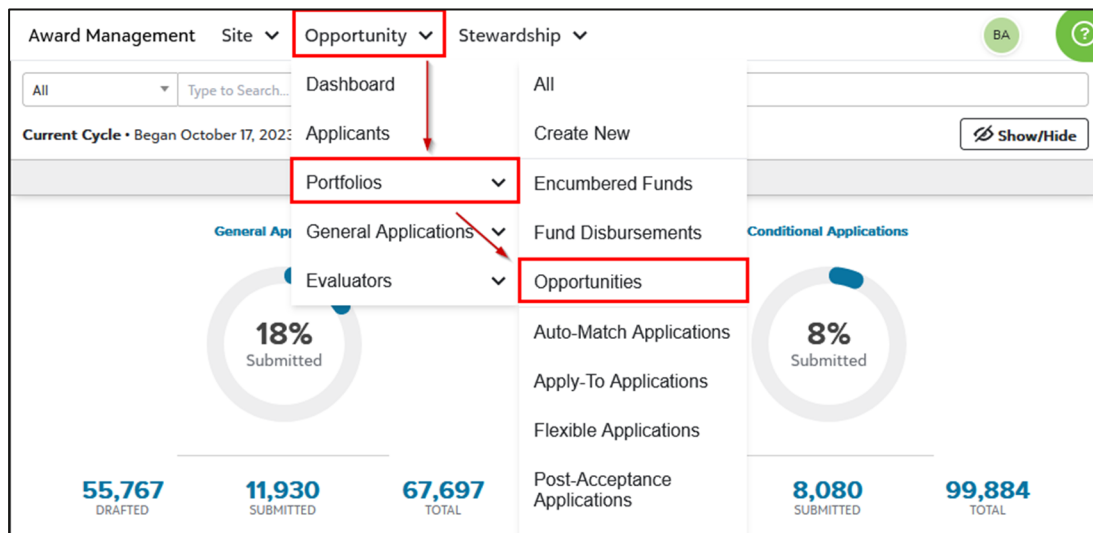
Once all applicants have been reviewed and the intended recipient(s) identified, the next step is to select the application(s) from within FS4U to initiate their offer(s). Scholarship offers can only be made at the opportunity-level (not at the General or Conditional Application-level). If an intended recipient is not yet found in the appropriate applicant pool, you will first need to force-apply that student from either the General or Conditional Application in order to get them into the applicant pool. This process is detailed in our [How to Force-Apply an Applicant](#) job aid.

### Navigating to Opportunities

Selection of recipients can be made from any opportunity's applications tab either applicant-by-applicant or in bulk. The 2 most common ways to navigate to the applications tab are as follows:

#### 1. Extending an award offer to a single applicant from the opportunity grid:

Click on **Opportunity** → **Portfolios** → **Opportunities** at the top of the screen.



Locate the desired opportunity and click **View**.

Opportunities

★	ID	↓	≡	⌕	☐	▼ Complete View				1-14 of 14	▼ Page 1	◀ ▶
<input type="checkbox"/>	View	ID	Type	Opportunity S...	Name	Description	Start At	Begin R...	End Revi...	End At	Internal ...	
		<input type="text" value="All"/>	<input type="text" value="All"/>		FSU Foundation							
<input checked="" type="checkbox"/>	<a href="#">View</a>	8...	Auto-Match	Ended	FSU Foundation - T...	*This fund is to be ...	11/01/2023	01/16/2024	10/10/2024	01/15/2024	01/15/2024	
<input type="checkbox"/>	<a href="#">View</a>	5...	Renewal	Frozen	FSU Foundation - T...		07/03/2021				10/19/2021	
<input type="checkbox"/>	<a href="#">View</a>	5...	Renewal	Frozen	FSU Foundation - T...		07/02/2021			07/03/2021	08/30/2021	

Select the **Applications** tab.

The screenshot shows the 'FSU Foundation - Test Fund' page. At the top, there are tabs: Details, Questions, Qualifications, **Applications** (highlighted with a red box), Communications, Reviews, and Post-Acceptance. Below the tabs, the page title is 'FSU Foundation - Test Fund' with subtext 'Aid Year 2024 | Ended 170 days ago | Imports stopped 170 days ago'. There are 'Notes' and 'History' buttons. The 'Basic Information' section lists: Name: FSU Foundation - Test Fund, Fund Code: None Given, Auxiliary Fund Code: None Given (For additional tracking), Project ID: None Given, and Donor: None Given.

## 2. Extending an award offer to a single applicant from the portfolio list:

Click on **Opportunity** → **Portfolios** → **All** at the top of the screen.

The screenshot shows the 'Award Management' interface. At the top, there are dropdown menus for 'Site', 'Opportunity' (highlighted with a red box), and 'Stewardship'. Below 'Opportunity', a dropdown menu is open, showing 'Dashboard', 'Applicants', 'Portfolios' (highlighted with a red box), 'General Applications', and 'Evaluators'. To the right of the 'Portfolios' dropdown, the 'All' option is highlighted with a red box. The main content area displays 'General Applications' and 'Conditional Applications' with progress charts and counts. The 'General Applications' chart shows 18% Submitted, with counts: 55,767 DRAFTED, 11,930 SUBMITTED, and 67,697 TOTAL. The 'Conditional Applications' chart shows 8% Submitted, with counts: 8,080 SUBMITTED and 99,884 TOTAL.

From the Portfolios page, you can apply filters that include Keyword Searches within the Fund Name, Fund Code, and Description, or apply one of the scopes such as a specific Department or OMNI Dept ID to find the correct portfolio. You will then be able to delineate between various iterations, or opportunities, of a particular portfolio.

For this example, we'll select the current iteration (Aid Year 2024) and click the hyperlink that states the number of Applications.

FSU Foundation - Test Fund			
Portfolio Details • Foundation Other		Donor: None Given	
	Aid Year 2024	Ended	Deadline: 01/15/2024
	Auto-Match	4 Qualification Groups	<b>5 Applications</b>
		10 Awards	
		\$100.00 Total	
	Aid Year 2021	Archived	Deadline: No Date Given
	Renewal	Disburses Automatically	0 Applications

*Note: This number (the number 5 in this example) will vary for each opportunity.*

## Initiating an Award

**The following steps will now be the same regardless of which method you used to arrive at the applicants.**

Locate the applicant(s) to whom you wish to initiate a scholarship offer and select their respective checkbox(es).

▼ Complete View											
1-5 of 5	▼ Page 1										
<input type="checkbox"/>	View	Award Mode	ID	Category	Categori...	Qualifica...	Name	Primary Email	Email Aliases	UID	Award P
<input type="checkbox"/>				All							All
<input type="checkbox"/>	View	Award Mode	1...	Submitted	01/24/2024	0					Fall 2023
<input type="checkbox"/>	View	Award Mode	1...	Submitted	01/24/2024	0					Fall 2023
<input type="checkbox"/>	View	Award Mode	1...	Submitted	01/24/2024	0					Fall 2023
<input type="checkbox"/>	View	Award Mode	9...	Submitted	01/24/2024	1					Fall 2023
<input type="checkbox"/>	View	Award Mode	9...	Submitted	06/13/2024	1					Fall 2024

**Note:** You can search for the applicants using any one of the blank boxes, such as Name, Primary Email, or EMPLID (UID) just below the column headers.

At the bottom left of the applicant grid, click **“Act on Selected”** and then **“Categorize”** from the drop-down.

<input checked="" type="checkbox"/>	View	Award Mode	1...	Submitted	03/22/2024	1
<input checked="" type="checkbox"/>	View	Award Mode	1...	Submitted	01/07/2024	1
<input type="checkbox"/>	View	Award Mode	1...	Submitted	11/29/2023	1
<input type="checkbox"/>	View	Award Mode	1...	Submitted	12/16/2023	1
<input type="checkbox"/>	View	Award Mode	1...	Submitted	03/29/2024	1
<input type="checkbox"/>	View	Award Mode	1...	Submitted	12/23/2023	1
<input type="checkbox"/>	View	Award Mode	1...	Submitted	12/29/2023	1
<input type="checkbox"/>	View	Award Mode	1...	Submitted	11/08/2023	1
<input type="checkbox"/>	Email Users			Submitted	11/09/2023	1
<input type="checkbox"/>	Categorize			Submitted	04/05/2024	2
<input type="checkbox"/>	Act on Selected					

Select the **Ready for Approval** category. This will reveal additional input fields, both of which are required. Foundation Accounting cannot process an award without an Amount AND an Award Period.

Categorize Selected

Choose a Category  
Ready For Approval

Update Amount  
Suggested: \$0.00

Award Period  
Choose an Award Period

Initial Opportunity Fund Information  
Opportunity Amount \$0.00  
Committed Amount (\$0.00)  
Total Remaining Amount \$0.00

Award Information  
Opportunity Awards 0  
Committed Awards (0)  
Total Remaining Awards 0

Categorize

**Initial Opportunity Fund Information:** Based on the pre-set Total Award Amount for the opportunity, this area informs administrators of how much funding remains available. If this section is \$0, you can submit a list of your scholarships, along with the \$ amount and # amount, to the [FS4U@advance.fsu.edu](mailto:FS4U@advance.fsu.edu) help desk, and

Foundation staff will update your opportunities. This section does not link to spendable cash balances and should only be used to budget your upcoming scholarships. It is also not required to be provided in order to issue an award. If you choose not to utilize this section of the system and this section is blank when attempting to move forward, administrators may encounter an "overextended funds" warning message that can be ignored. You should always consult your available balance reports to determine how much cash is available.

**Award Information:** Based on the pre-set Total Award Amount for the opportunity, this area informs administrators of how many awards remain available. The same information above applies here.

You may also see the following warning message in red when filling in the Update Amount field depending on the minimum and maximum award amounts you have set at the portfolio level:

Amount must be greater than or equal to \$X,XXX and less than or equal to \$X,XXX

If you are trying to enter an amount that is less than the minimum amount set or greater than the maximum amount set, you will not be able to complete the action. Please note, most Opportunity Administrators are not utilizing this functionality and will not experience this warning; however, it is available. If you would like to add minimum and maximum amounts or make any changes to established ranges, please submit a list of your scholarships, along with the minimum and maximum \$ amounts, to the [FS4U@advance.fsu.edu](mailto:FS4U@advance.fsu.edu) help desk, and Foundation staff will update your opportunities.

Now, we can enter the desired award amount in **Update Amount** and select an **Award Period**.

**Award Period** does offer the ability to select combined terms, such as **Fall 2024/Spring 2025** to reduce the number of awards you will need to process. Combined terms should only be selected if the total award amount is to be split evenly across both semesters. The available balance of the fund must be able to cover the entirety of the award entered at the time it is entered or you will encounter a budget error that will delay disbursement to the recipient(s). If, however, an award that covers a consecutive Fall and Spring term varies from one semester to the next, these should be entered as 2 separate awards. There is the option to establish these awards as renewals, which typically covers multi-year scholarships but can also be utilized in this scenario. For assistance with establishing a renewal award, please email the [FS4U@advance.fsu.edu](mailto:FS4U@advance.fsu.edu) help desk.

When processing awards, you also have the option to bulk (or batch, if you prefer) categorize applicants when selecting more than one; however, this should be used only when all students will be awarded during the same term(s) and with the same amounts. If the terms and amounts vary, you will need to group them by these shared components or process them individually.

Once you have inputted the **Amount** and **Award Period**, click **Categorize**. These changes reflect in the individual award records instantly but may take a few minutes to reflect in the grid view.

At this point, the award(s) will now be in your Budget Approver's queue for review. As the Budget Approver role is proprietary for FSU, there is currently no option to trigger an automated email to this user notifying them of these awards. Please manually notify your Budget Approver to ensure new awards are processed in a timely manner.