**ADDITIONAL FEATURES TO SMFI SCHOLARSHIP PROGRAM**

**(Updated as of 13 August 2015 during 2nd Iteration meeting with APC)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Module 1** | **Module 2** | **Module 3** | **Access Rights** |
| System Administrator 1 | Linda Atayde (Project Owner) | | | Full access to all modules including override function |
| System Administrator 2 | Ling Lansang (Co-Project Owner) | | | Full access to all modules including override function |
| User 1 | Val Ramos | Tess Samillano | Val Ramos | Full access to respective module |
| User 2 | Greg Baclea-an jr | Greg Baclea-an jr |  | Full access to respective module |
| User 3 |  | Katherine Virrey |  | Full access to respective module and extract interface files |
| User 4 |  | Jenn Ocampo |  | Full access to respective module and extract interface file |
| User 5 |  | Cath Llarena |  | Full access to respective module |
| User 6 |  | Scholars |  | * Creation of Course syllabus/list of all subjects. * Tagging of subjects for the term * Inputting of Grades |
| User 7 |  |  | Alumni | * Input Testimonials * Update Profile |

**List of account users and access rights:**

**Module 1:**

1. Applicants must meet **ALL** the 3 basic qualifications before they can quantify to take the Exam:
   * 1. Applicant must be a graduating 4th year HS student in any Public School or MAPSA);
     2. Must have a weighted average of at least 88% by the 2nd or 3rd grading period;
     3. Family annual income must not be more than P150,000.

*Notes:*

* + - * *SMFI will call the applicants via their mobile or landline phone if they have qualified to take the exam. Exam date and venue will be also advised.*
      * *SMFI will call exam passers via mobile or landline phone to advise interview date and venue.*
  1. Update online Application Forms:
     1. Address should have separate fields for:
        + House no. , Name of Street, Name of Subdivision/Village
        + Barangay / Area
        + City
        + Province
        + Region (NCR, Luzon, Visayas, Mindanao)
     2. Height and Weight fields should specify unit of measurement
     3. To include check box for:
        + Public School
        + MAPSA
        + Others
     4. To include Field (drop-down list) indicating the Nearest SM branch. This is for provincial applicants only.

Note: Provincial SM branches list is indicated under Column C of the ‘Distribution per Area’ file (**file sent to APC last 13Aug 2015**)

* + 1. For applicants not applying online, they should also have username to access their account online. To be sent to them via email or sms.
  1. Under ‘College Database’,
     1. Remove ‘CREATE COLLEGE’
     2. Remove the icons ‘VIEW, EDIT, DELETE’

1. To incorporate the weighted average for Exam and Interview:
   * 1. Exam results must be above average (currently at 77%);
     2. Qualifying assessment is based on: Exam result (70%) and Interview (30%)
     3. Weighted average of Exam and Interview should be at 75% to qualify for Home visit assessment.
2. To set up the target no. of scholars per area/location (**file already sent to APC last 13Aug2015**).

Note: if Total no. of Successful applicants per area is lower than the Target no. of scholars per area, **add override function** (restricted to system admin users only) to consider the next applicant in line.

1. System to generate **Ranking** of Exam passers, based on Total, and per area/location.
2. Convert existing qualifying Exam to online version
3. Program to include Reports for system generated Letters such as: Congratulatory, Regret, Letter to Schools (**format of Letters to be provided to APC**).

**Module 2:**

1. For Allowance of scholars –
   * To create Button for ‘**HOLD**’ where month’s allowance will be held pending completion of all required documents; once all required documents are submitted, ‘HOLD’ button will be lifted and payment retro for all months on hold.
   * Add ‘**PAYMENT DATE**’, so that when we release the HOLD Button in the current month, the previous months’ (historical) record will not change.
2. Revise the name of ‘Explanation form for low grades’ to “**Deficiency Explanation form’** which will cover explanation field for those who have low grades (below 85%) or failing grades
3. Scholars will have a **SCHOLAR ID** using the naming convention: **Surname+First letter of First Name**. Example: Juan dela Cruz, Scholar ID will be: **DELACRUZJ** (as confirmed with SMFI’s Ling Lansang).
4. Scholars will be the ones to input the subjects and grades for the term. SMFI will check/validate.
5. Once SMFI approves the Grades, scholars cannot add/edit anymore.
6. Note: Withdraw / Drop / Repeat is equivalent to FAIL (Grade equivalent to ‘0’)
7. Add ‘**GRADES CONVERSION TABLES** to define the different school’s Grading System:
   * These will be filled up by SMFI during set-up stage
   * Will have several Grades Conversion Tables as some Schools have different Grading System.
8. Reports to be generated by Module 2: **Interface Files to SAP (with Hash Totals)**
9. Scholars’ Allowance (One–line only) Invoice
10. Scholars’ Deductions (One-line only) Credit Memo

3. Payment to Schools for Tuition Invoice

4. Other Payments to Scholars: Invoice

4.a Incentives (Dean’s Lister, Academic Excellence)

4.b Refunds

1. Create Button to ‘**EXPORT**’ Interface files to SAP.
2. Create a Report - **Allowance Analysis for the Month**:

|  |  |  |
| --- | --- | --- |
|  | |  |
| NCR Allowance x No. of Scholars | | XXX | |
| Provincial Allowance x No. of Scholars | | XXX | |
| Total Amount | | **XXX** | |
| Scholars not entitled to Allowance | | (XXX) | |
| Hold Accounts | | (XXX) | |
| UnHold Accounts | | XXX | |
| \*Total Allowance for the month | | **XXX** | |

*(\*should tie –up with the interface file to SAP)*

1. Add column for ‘**Classification of Scholars’: (SMFI provided sample data last 14Aug 2015)**
   * + - * Entitled to Tuition, Allowances, and Incentives:

SMFI

My Scholar A

Kabayan

Rufus

* + Entitled to Tuition (c/o Sponsor) and Incentives only (not entitled to Allowance):
    - My Scholar B
    - ICA

*Note: to include column ‘Name of Sponsor’*

**Module 3:**

1. To include functionality to generate reports that may be filtered/sorted based on Residence, year graduated, name of current company, position, etc.
2. Create ‘Alumni ID’: **Year Graduated+Scholar ID.** Example: Juan dela Cruz graduated in 2015. Alumni ID will be: **2015DELACRUZJ** (as confirmed with SMFI’s Ling Lansang)
3. For Alumni from Module 2, Program to push report to Module 3 to automatically create Alumni ID (as confirmed with APC’s Sean Sanchez).
4. For other alumni (not coming from Module 2), Program to assign Alumni ID by following rule under item b. To send email blast to the alumni to advise them that an ID has been created for them that they can use to access the Program.
5. Use ‘ALUMNI ID’, instead of ‘Employee ID’
6. To include program that can Upload file to populate alumni Masterfile.
7. To have a function that can AUTO EMAIL events, announcements, activities, etc. to alumni.