

KALEIDOSCOPE INFORMATION

Contact to Join the Kaleidoscope Program

Barbara Milligan, Director of State Programs & Services Programs@kidschance.org

Kaleidoscope Help Portal with Training Documents https://help.mykaleidoscope.com/

Training Videos

How to Streamline Your Application Review Process <u>link</u>
Kids' Chance initial training video <u>link</u>

Resources

Kids' Chance Sample Score Card

Creating a New Review Round

Kaleidoscope Online Review Process (for Reviewers)

Common Application

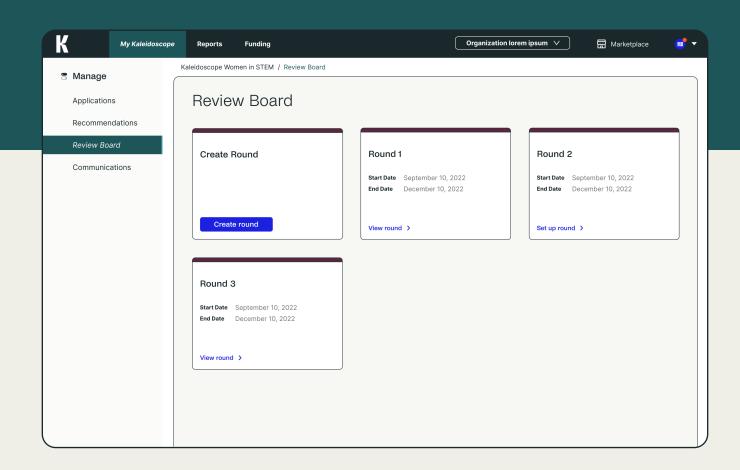
Common Renewal Application

- 1. Enter the applicant's SAI
 - 1. Text Field
- 2. Rate the Nature of the accident
 - 1. Picklist (options below)
 - 1. Minimal
 - 2. Moderate
 - 3. Severe
- 3. Please comment on the applicant's financial need.
 - 1. Long Text Field
- 4. Applicant's GPA
 - 1. Number
- 5. Please comment on the applicant's intended goals and career interests.
 - Long Text Field
- 6. Please comment on any unusual circumstances or financial changes.
 - Long Text Field
- 7. Recommended Fund amount for applicant 2023-2024 (Choose from list based on your award amounts such as: \$1,000, \$2,500, \$5,000)
 - 1. Picklist options based off the dollar amount your state awards
- 8. Please provide a brief explanation as to why you chose this amount.
 - 1. Long Text Field

Kaleidoscope

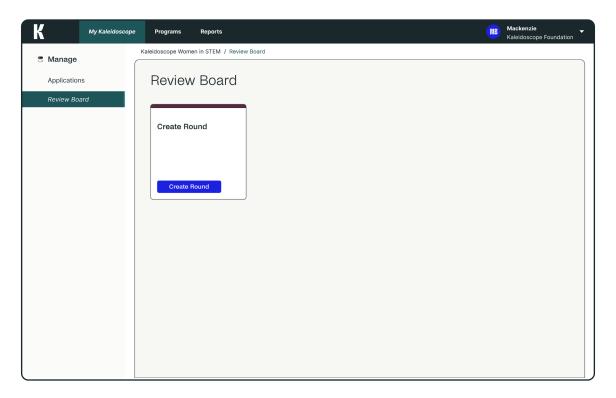
HOW-TO GUIDE

Creating a New Review Round





Step 1: Select Blue 'Create Round' button to begin creating your review round settings



Complete all required fields

Required Fields:

• Round Title - Name your round

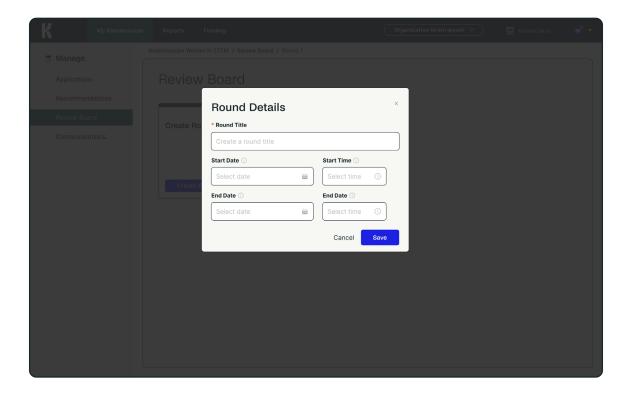
Optional Fields:

- Start Date Enter the date you'd like this review round to start. On this date, your review round will be available to your reviewers to begin reviewing.
- **Start Time** Enter the time this round should open for reviewers. Time entered is based on your local time zone.
- *End Date* Enter the date this review board should close. On this date, your reviewers will not have access to continue reviewing.
- *End Time* Enter in the specific time the review board should close. At this time, your reviewers will not have access. The time entered is in your local time zone.

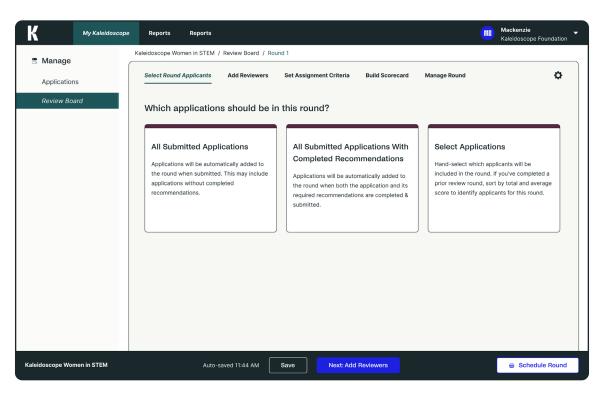
Click the blue 'Save' button to save your work and proceed to the next step.



Click 'Cancel' to cancel this round set up.



Step 2: Select which type of applications should be in this round.



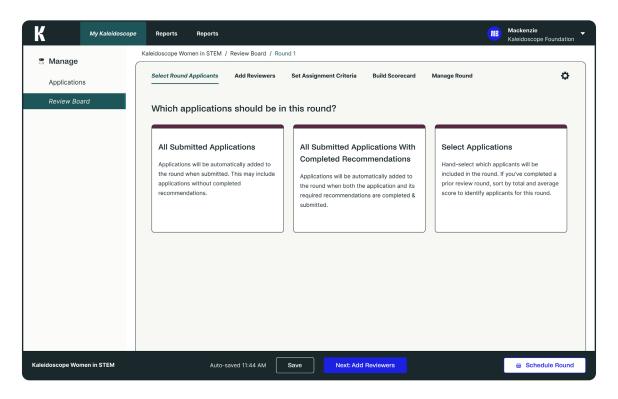


All Submitted Applications – Applications will be automatically added to the round when submitted. This may include applications without completed recommendations.

All Submitted Applications With Completed Recommendations – Applications will be automatically added to the round when both the application and it's required recommendations are completed and submitted.

Select Applications – Hand-select which applicants will be included in the round. Upon selecting this setup, a table will display that lists all the applications created for your program.

• To select an applications, click the '+' button.

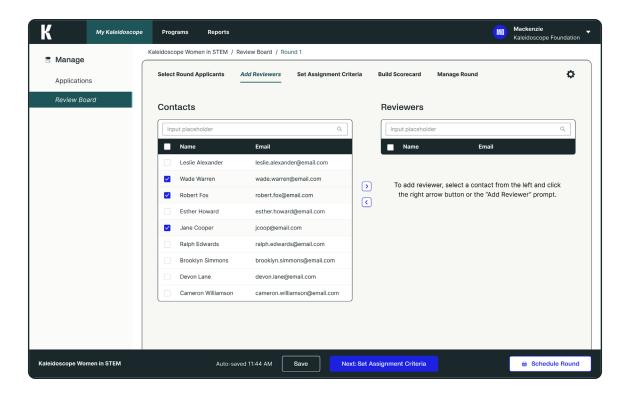


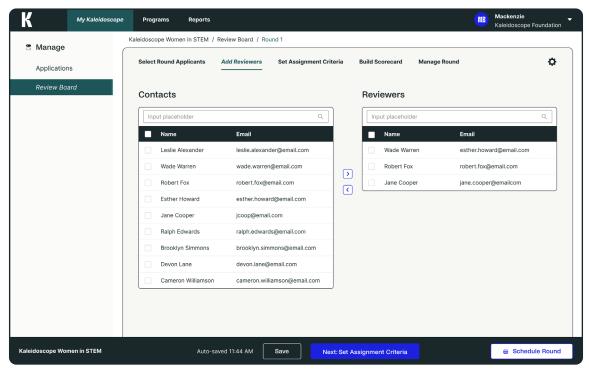
Click 'Add Reviewers' to proceed to the next step. Note that this program will auto-save as you go.

Step 3: Add Review Board Members to your newly created round.

- From your contact list on the right-hand side, select the contact(s) whom you'd like to review in this round.
- Click the blue middle arrows to add them as reviewers. You can also remove a reviewer this way.
- Names listed under 'Reviewers' are the contacts you are selecting as reviewers for this round.

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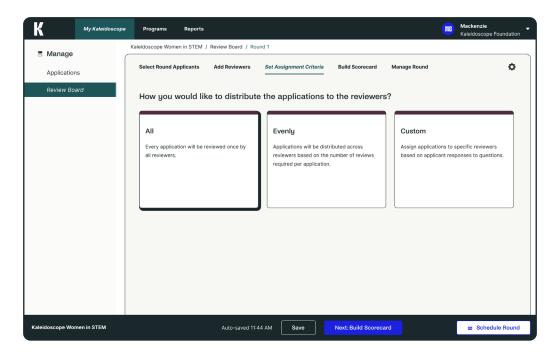


Once you have completed your selections, click on 'Select Assignment Criteria' to proceed to the next step.



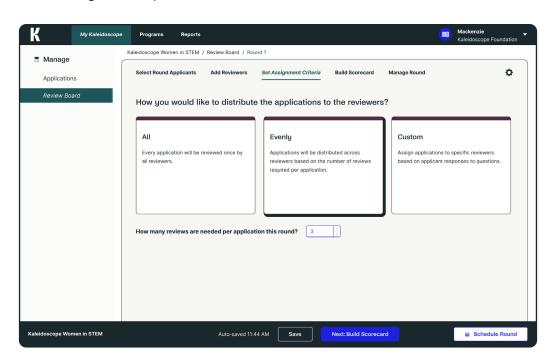
Step 4: Select how you would like to distribute applications to reviewers.

Option 1: All - Every application will be reviewed once by all reviewers.



Option 2: Evenly - Applications will be distributed across reviewers based on the number of reviewers per application.

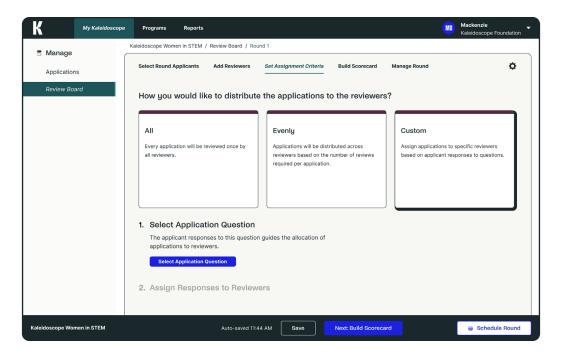
• Define how many reviewers are needed per application in this round. For example, if each application needs to be read by three separate reviewers in this round, enter "3".





Option 3: Custom - Assign applications to specific reviewers based on an applicant's responses to questions.

• Click the blue 'Select Application Questions'. The applicant's responses to the selected question then guides the allocation of applications to reviewers.

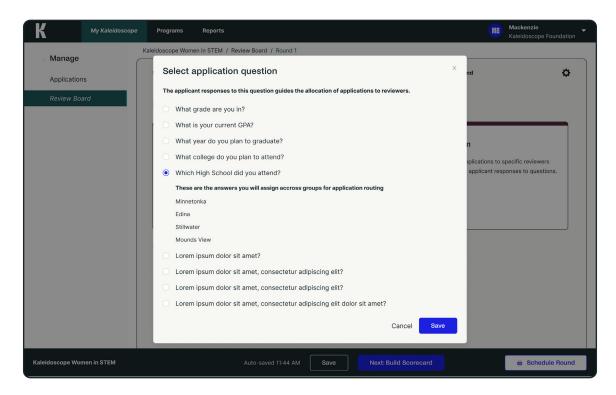


• Select the question you would like to use to allocate the distribution of applications to reviewers. For example, if you wanted to sort your review groups by school, you would select the question in the application; "What high school did you attend?".

Note that only the following question types are available for this assignment criteria: Multi-select, Single Select, and Dropdown.



- Upon selection of your question, the available answers will appear below.
- Click the blue 'Save' button to proceed to next step.

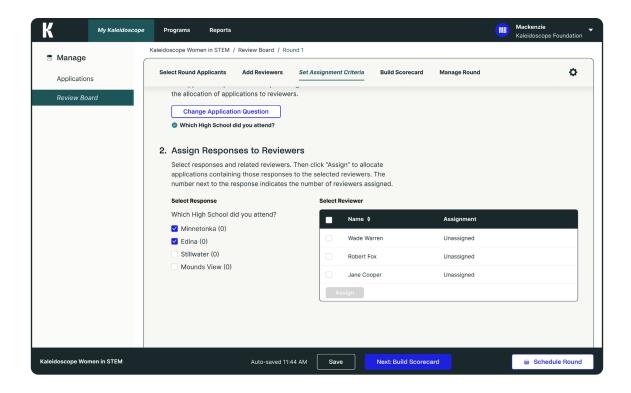


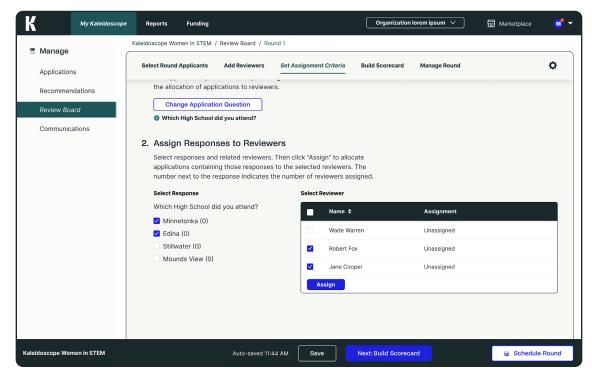
Assign Responses to Reviewers

• Select a response, then select a reviewer that you'd like to review all applications with that response.

For example, if I select "HS Freshman", then select "Morgan Phipps" and "Laura Kniffin", and then click "Assign", this means that Morgan and Laura will be assigned to review all applications where the student answered "HS Freshman" to the application question, "Which High School did you attend?".

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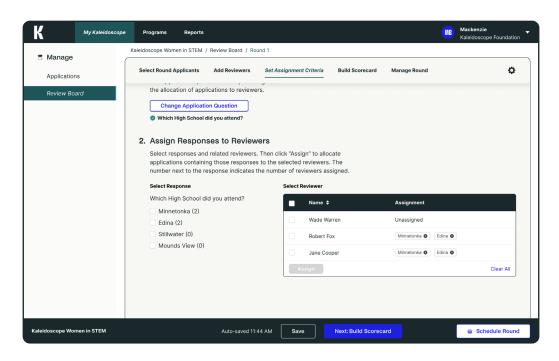




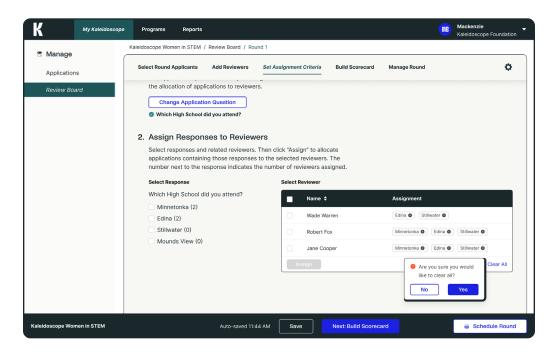
After clicking the blue 'Assign' button, the bottom table will refresh with your assignments. The responses will also display how many reviewers are currently assigned to that response.



In the example below, you can see that two reviewers are assigned to review "HS Freshman". You can also see that Matt, Pete, and Jeremy are left unassigned.



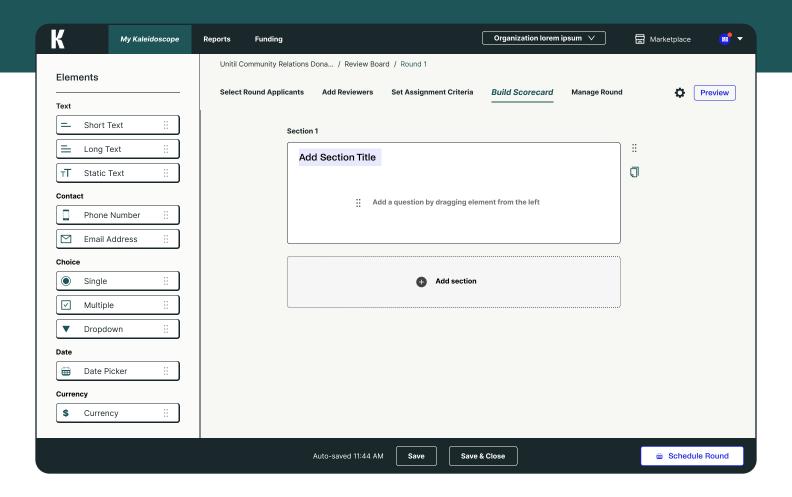
You can clear an assignment by clicking on the small 'X' in the assignment tag. Select 'All reviewers' and 'Clear All' to remove all reviewers.

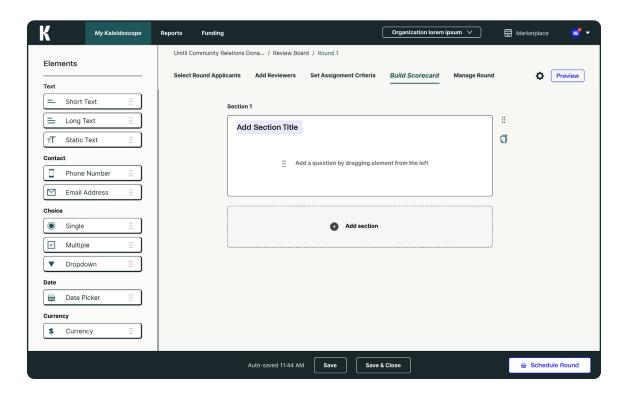


Once your assignments are completed, select the blue 'Build Scorecard' button to proceed to the next step and build your scorecard.

HOW TO

Build your scorecard





The scorecard is a group of questions your reviewers will answer while reviewing each application. To begin building your scorecard, select a question type from the left-hand Elements menu.

Available Question Types:

- Short Text This will provide a short text answer box (up to XX characters).
- Long Text This will provide a longer text answer box, often used for comment boxes. (up to XX characters).
- Static Text This will be text displayed on the scorecard, often used for adding additional instructions within a section.
- **Phone Number** This will provide an answer box that restricts end user's from typing anything outside of a phone number format. For example, (XXX) XXX XXXX.
- *Email Address* This will provide an answer box that restricts the end user's from typing anything outside of a typical email format. For example, Text@text.com.
- Single Choice Displays each answer option next to a button. The end user is only able to select 1 of the answer options.
- *Multiple Choice* Displays each answer option next to a button. The end user can select multiple answer options.



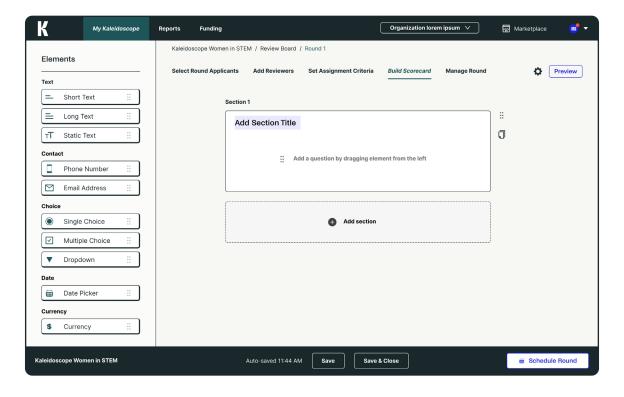
- Dropdown This displays a dropdown list. The end user is only able to select one of these answer options.
 - Kaleidoscope offers editable pre-defined lists (may need context here)
- Date Picker Displays a calendar for the end user to select a date.
- *Currency* This will provide a small answer box that restricts the user to only type in numbers. The format displayed upon entering will always be \$XX.XX.

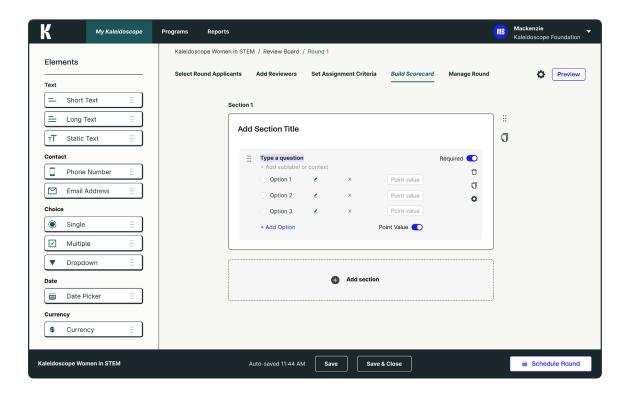
Step 1: To begin building your scorecard, you can add a section title by clicking on 'Add Section Title'.

- Additional sub-text can be created by clicking 'Add sub label or context'.
- Note that Section Titles are not required. If you do not want score questions grouped by a section, skip this step and continue to Step 2.

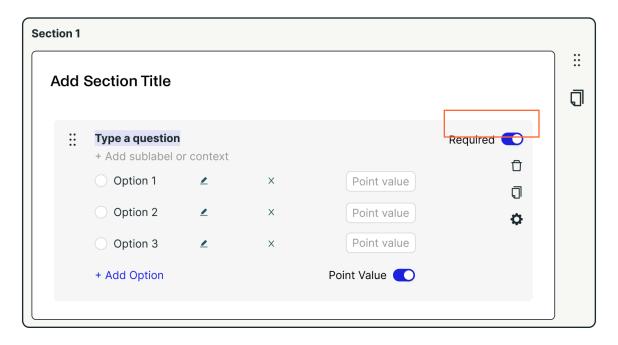
Step 2: To add questions to that section, drag and drop your desired question type from the left-side Elements list into the section. Note that there is no limit to the number of questions within a section.

Add your first score question by typing directly into the 'Type a question' section. Additional subtext can be added under your question.



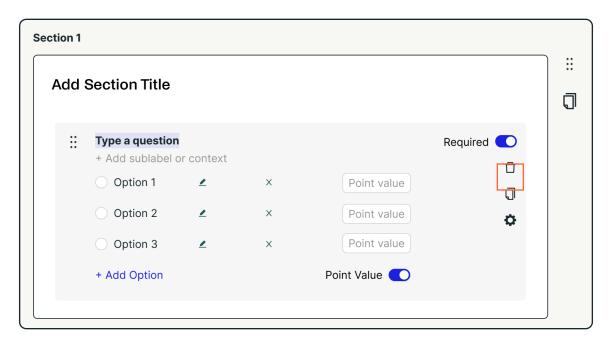


To mark this question as required for your reviewers, toggle the button next to 'Required' to the right side. Solid green will show in the bar.

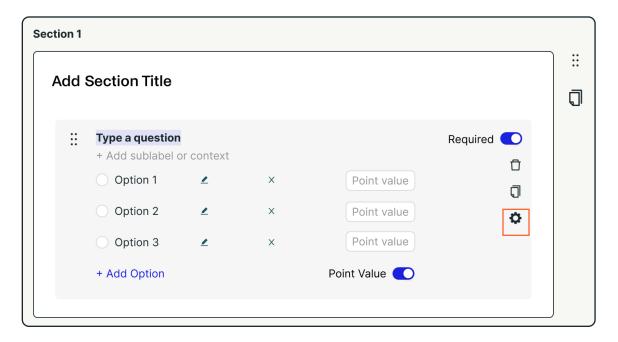




To remove a question, select the small Trash Icon below the 'Required' toggle.

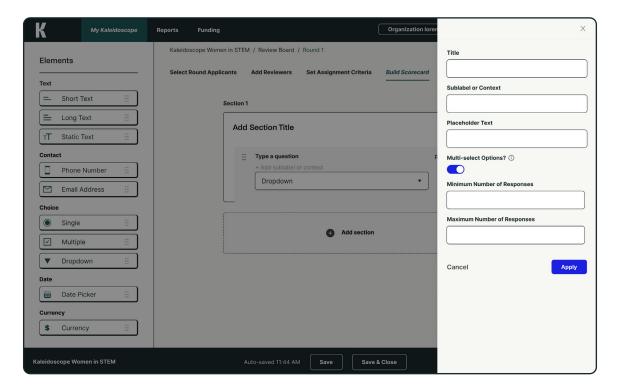


To add additional settings to your question, click on the Gear Icon under the Trash Icon



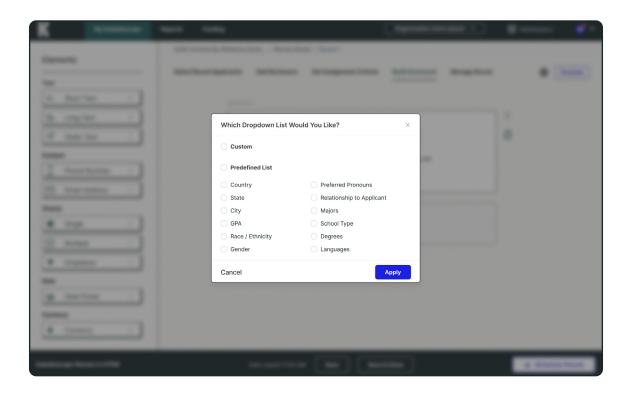


The settings available here depend on the question type. For single-select question types like the example shown here, there is an option to enable multi-select options. If this setting is on, this question can have multiple responses. You can limit the number of responses allowed here.



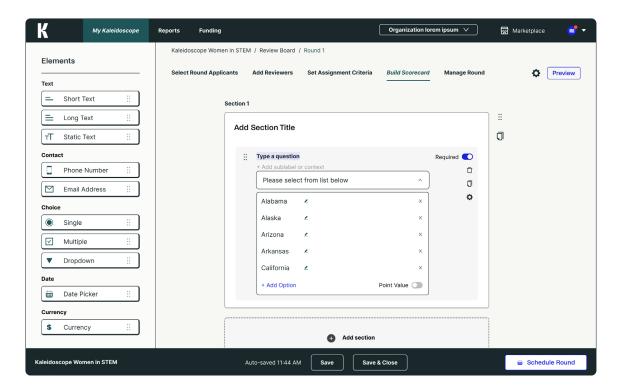
Choice Question Types:

• *Dropdown question types*— display a list of questions where the user can select one option. When you add a dropdown question to your scorecard, you have the option to build a custom list or use one of Kaleidoscope's pre-defined lists.



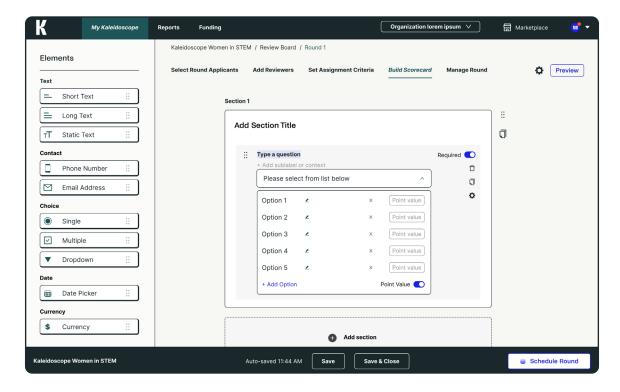
Using a pre-defined list allows you to:

- Add additional answer options by clicking (+ Add Option).
- Remove an answer option by clicking on the small 'X' on the right of the answer option.
- Edit an answer option by clicking on the small Pencil Icon next to the option.





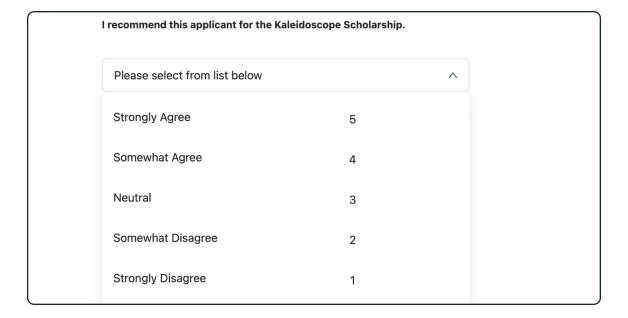
A custom list allows you to add point values to each answer option by toggling the point value to the right. Point values are active when the bar turns green, and an additional column for point values appears next to each answer option.



Points can be added in the number input box next to the answer option.

In the example below the points entered here tell us:

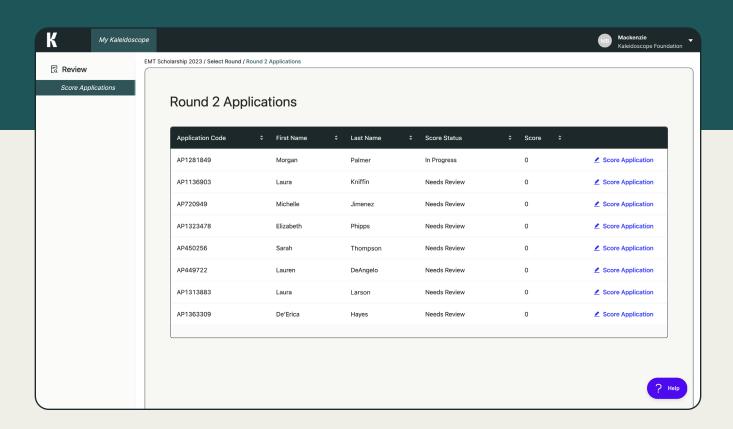
- When a reviewer selects "Strongly Agree," 5 points will be added to the application's total score.
- If a reviewer selects "Neutral," 3 points will be added to the application's total score.



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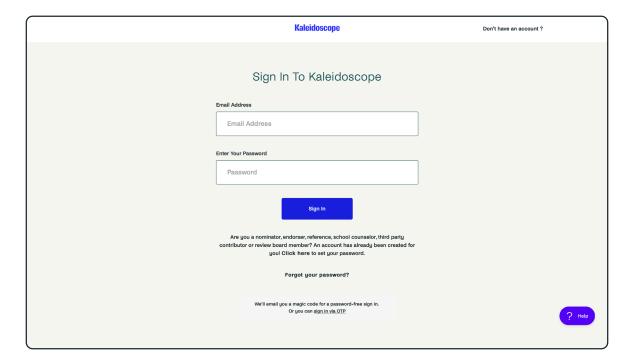
STEP-BY-STEP GUIDE

Kaleidoscope Online Review Process





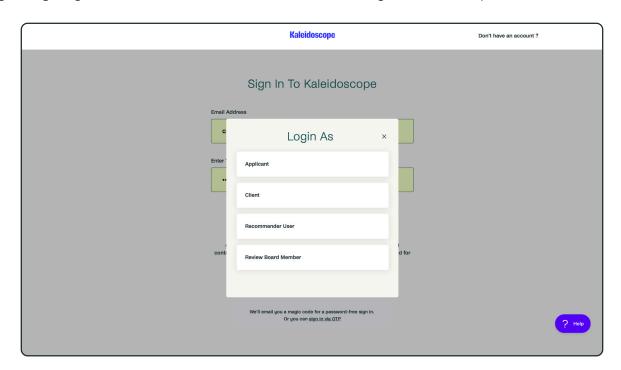
Login to Kaleidoscope: https://apply.mykaleidoscope.com/login



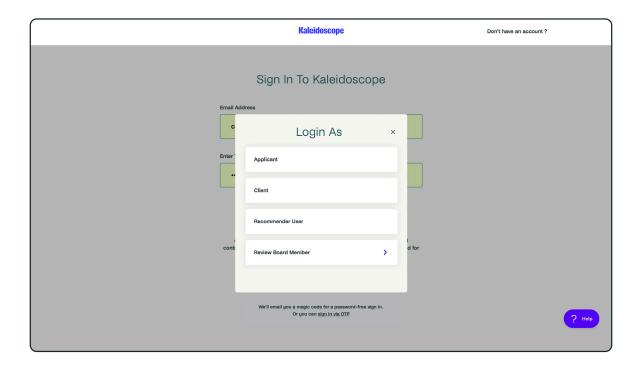
Username: Your email address

Password: Same password you've used in the past. If you have not set your password, go to the link above and select "Forgot Password" - you can create your password for your Kaleidoscope account.

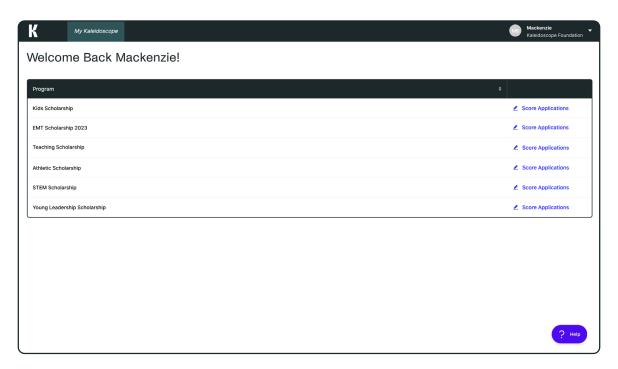
When you log in, you will be directed to the screen below if you have multiple roles in Kaleidoscope.



Select "Review Board Member."



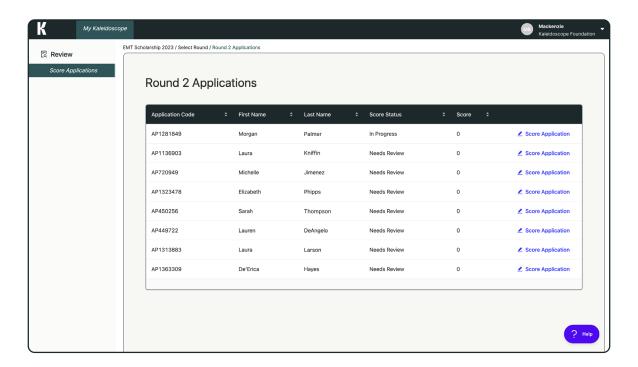
Once logged in as a "Review Board Member," you will see the following screen with the programs you are reviewing listed.



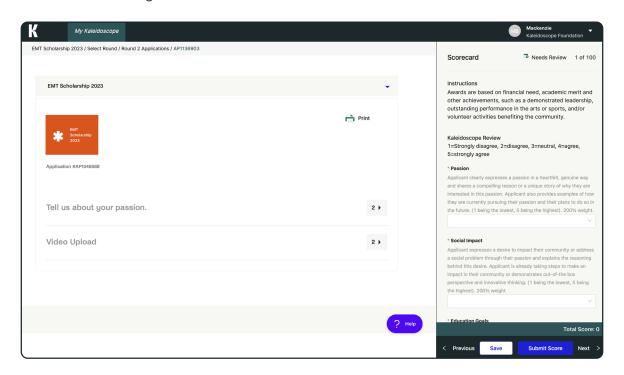
Click "Score Applications" to see the applications ready for review.



Click on "Score Application" to view an application and begin scoring applications

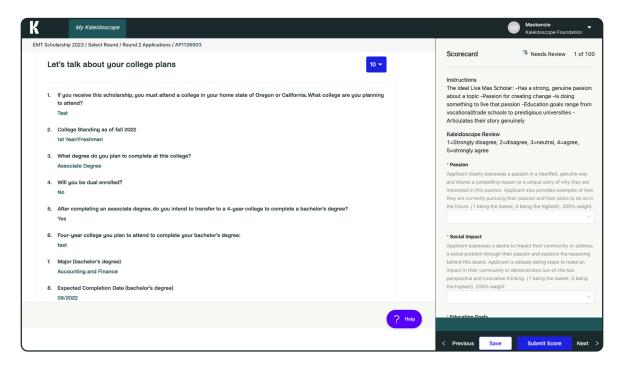


Once you get brought to an application to review, enter your comments/scores on the screen's scorecard located on the right-hand side.

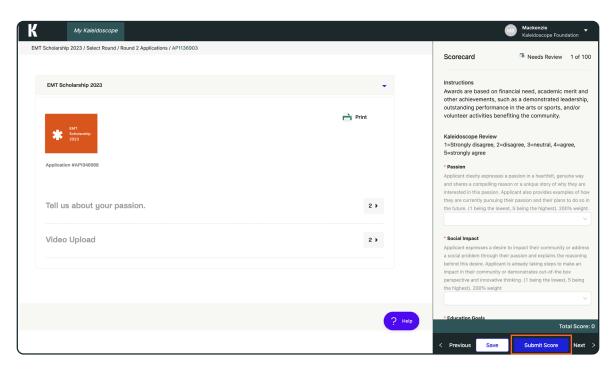




Click the drop-down arrows for each application step to view the questions and answers that the applicant completed. You can open all steps or open and close as you go through the application.

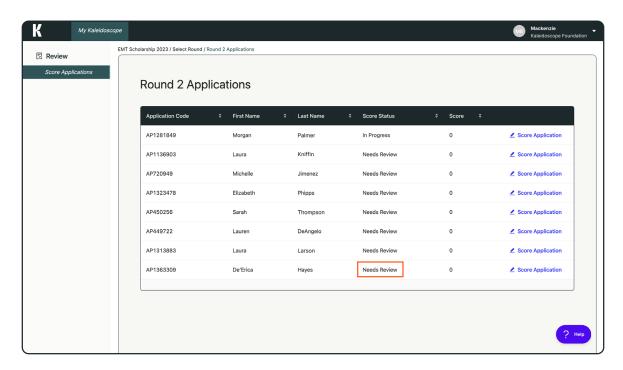


Once you've entered comments/scores and completed your application review, click "Submit Score." You will then be brought to the next application that needs to be scored.





You do not need to complete your reviews all at one time. You can start and finish reviewing before the review period closes. Make sure you have no applications left to review with a score status of "Needs Review."



If you experience any technical difficulties or have questions, please get in touch with our support team at help@mykaleidoscope.com.