University of North Carolina Wilmington
Office of Scholarships & Financial Aid

User Manual
Next Gen Scholarship Software

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SECTION I: OVERVIEW

CONTEXT

Financial aid is money to help pay for expenses associated with obtaining college education. Financial aid includes grants, loans, work-study and scholarships. Scholarships are usually merit-based, but may also be need-based or a combination of both. The donor determines if a scholarship is merit or need-based at the time the scholarship is established.

The Office of Scholarships & Financial Aid (OSFA) is responsible for managing the application of student financial aid to students' financial aid in accordance with federal, state and institutional guidelines. There are limitations that guide the distribution of need- based aid. The Free Application for Federal Student Aid (FAFSA) is used to determine a students' eligibility for need-based aid. Students must complete the FAFSA in order to receive need-based aid. For questions regarding information within this manual, email scholarships@uncw.edu or call (910) 962-3177.

PURPOSE

Next Gen is a comprehensive software program that provides scholarship application, eligibility determination and awarding solutions within the OSFA.

APPLICATION - The software is available to users 24/7 and is accessible with a single sign on through the university's portal - mySeaport. Students can apply for multiple scholarships with a single application. Next Gen integrates stored in Banner as part of the candidate profile. For this reason, applicants are never asked to respond to questions for which the answer is known, such as major, GPA, number of completed hours and number of transfer hours, residency, etc. With embedded smart features, applicants bypass questions that do not pertain to them.

ELIGIBILITY DETERMINATION – Many scholarships have unique selection criteria. The software is able to restrict the applicant pool based upon the eligibility criteria and only display the applicant information for the eligible candidates. For need-based awards, departments are able to assess students' eligibility for need-based aid at the time of the deliberation.

AWARDING – Users at the department level identify award recipients, amounts and academic into the system enabling the generation of reports by OSFA Staff. After the OSFA staff reviews/confirms the award information, the award is added to the account of the student. Non-donor, departmental funds are also awarded within Next Gen. Use the Scholarship Setup Form (see page 16) to establish a non-donor fund. This is a fillable form accessible at: www.uncw.edu/finaid/forms.

This user manual is intended to address basic processes associated with the scholarship software. A more detailed **Decision Maker Guide** is accessible within the Help Center of the software.

SECTION II: USERS

TYPES OF USERS

Administrator – Access level for system administrators, personnel in the Office of Scholarships & Financial Aid, University Advancement, and Academic Affairs Resource Management

Decision Maker (aka Committee Member) – Access level for individuals that review applicant information to determine eligibility and/or enter award information for recipients

Student – Access level for applicants

LEVELS OF USER ACCESS

Standard Member – access to view candidate data and enter evaluation comments for candidates

Chairperson (Award Only) – access to view candidate data, enter evaluation comments for candidates and enter award information for recipients

Chairperson (Evaluate and Award) – access to view candidate data, enter evaluation comments for candidates, view evaluation comments of other committee members, and enter award information for recipients

GRANTING/CHANGING ACCESS

The *COMMITTEE ACCESS FORM (*see page 17) is used to indicate individuals authorized to access funds within an org. The form is used to add users, change the level of access or remove access. This is a fillable form accessible at: www.uncw.edu/finaid/forms.

SECTION III: TIMELINE

Application Dates
December 1st – application opens; March 1st – application closes

Awarding Process
December 31, 2016 – deadline for donors to contribute for the upcoming aid-year awards

March 15, 2017 – upcoming aid-year amounts represented in Next Gen

June 1, 2017 – priority date to enter award information to ensure the award is applied to the July bill

July 1, 2017 – award information communicated to award recipients

August 23, 2017 – fall semester drop/add date

August 25, 2017 – departments notified of students that are not enrolled; directed to select new recipient(s)

August 29, 2017 – departments select alternate award recipients

September 11, 2017 – Advancement notifies students of "Thank you" letter process

January 16, 2018 – spring semester drop/add date

January 18, 2018 – departments notified of students that are not enrolled; directed to select new recipient(s)

January 22, 2018 – departments select alternate award recipients

SECTION IV: GUIDING PRINCIPLES

- Refer to the terms of the donor agreement to determine:
    - eligibility criteria
    - ability to award full amount in fall or if the award should be split among the two semesters
    - if one candidate is required or if the award can be divided among multiple recipients
    - the award amount (set amount versus full available earnings)
- If the recipient is scheduled to graduate in the fall, indicate the spring recipient in the fall also.
- Identify an alternate in case the selected student does not enroll
- Make awards by the deadline. It may take up to 2 weeks to add award information to students' records, depending on the time of year. It may take an additional week for processing by the Student Accounts Office to facilitate the payment to the student.

Accessing Next Gen via mySeaport
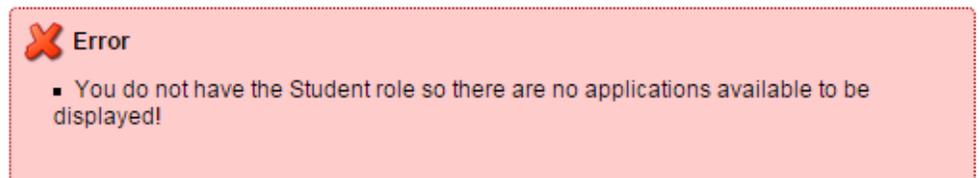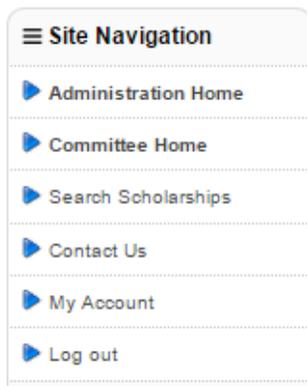
STEP 1: Select the **Academics Tab.**
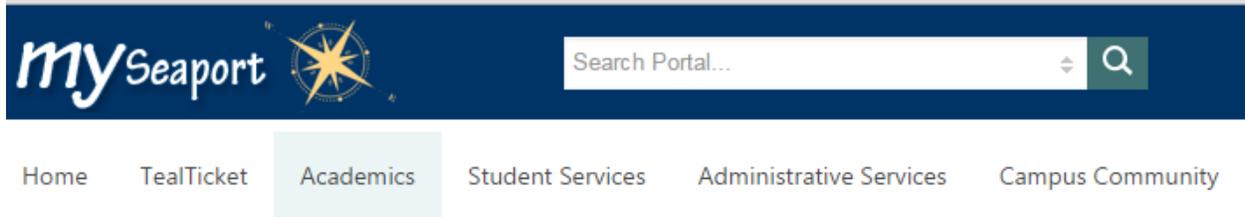
STEP 2: Scroll down to the Finaid Scholarships Tools bar and select **Scholarship Admin or Scholarship Committee,** based upon your role. (NOTE: Faculty members and Administrative Staff within Academic Departments have the role *of Committee Member not Administrator*).
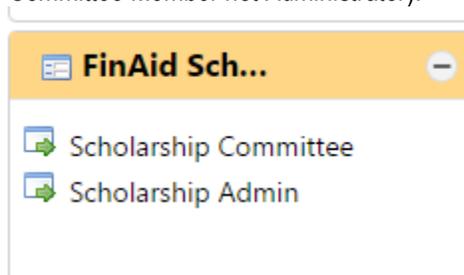
This will take to you the scholarship software, the landing page for students.

STEP 3: Select **Administration Home or Committee Home,** based upon your role, to be directed to your normal view.

AWARDING FUNDS

Step 1: Select **My Committees** from the left navigation pane.

Step 2: Select your committee from the center of the screen. *You will only see the committees to which you are assigned.*

Step 3: Select the scholarship name. In this example, the scholarship is **"Z-Test".**

Committee - "Z - Test Committee"

My Committees

Fund(s) To Be Awarded

Fund	Candidates	Awarded	Awarded $	Balance	Modify Awards
Z - Test	3	0	$0	$100	N/A

Step 4: If not using the software's application, from the **Available Candidate** box, select the **Import Candidate** option.

Available Candidates (3)

| Search: | | Search By Last Name | Reset | | Export Data | | Icon Legend |

Matching: Perform Matching

Candidates: Award Selected Candidates   Remove Selected Candidates   Import Candidate

Data View: Show Chairperson Options   Set Committee Preferences

	✔	PDF	SNAP	Candidate	Current Awards	Z_Major	Z_UNCW GPA	Z_UNCW Overall Hours	Z_UNCW Student ID
1.	☐	📄	👤	Marianne	0	No.	no data	no data	no data	no data

Step 5: Type the recipient's name, click the search button and close the dialog box after you have selected the recipient.

Import Candidate - Z - Test

Help

This page allows you to import a candidate that did not meet the hard requirements for the fund. You can also use this page to import a candidate that may have been previously removed as a candidate.

In the space provided below, please enter the full or partial name of the candidate you wish to import.

Search by Name

| | Search |

Step 6: From this page, select the box beside the recipient. Then click the **"Award Selected Candidates"** button.

Step 7: Enter the fall and spring award amounts; click the **Save Award Information** button.

Step 8: For renewals, select the **Details** button and proceed accordingly to confirm or modify the installment.

MODIFYING AWARD INFORMATION

STEP 1: Once you are in the committee view, select the **Details** button.

Review Candidates for "Nieka "Sean" Wright Fellowship"
My Committees | Foreign Languages & Literature Department committee

Nieka "Sean" Wright Fellowship   Manage Requirements

TBA

Details

Candidates Already Awarded (1)   Award Emails
- $500 of $2,700 awarded.
- 1 of 2 awarded.   Build Report
View Last Year's Winners

Details   Close Awarding

Available Candidates (1)

Search: [   ] Search By Last Name Reset   Export Data   (i) Icon Legend

Matching: Perform Matching

Candidates: Award Selected Candidates   Remove Selected Candidates   Import Candidate

Data View: Show Chairperson Options   Set Committee Preferences

✔	PDF	SNAP	Candidate	Current Awards	FLL_Colleges	FLL_Degree Audit	FLL_Essay #2	FLL_Language original essay	FLL_Lapaire academic essay	FLL_money received	FLL_

STEP 2: Select **Modify/Withdraw Awards.**

Review Candidates for "Nieka "Sean" Wright Fellowship"
My Committees | Foreign Languages & Literature Department committee

Nieka "Sean" Wright Fellowship   Manage Requirements

TBA

Details

Candidates Already Awarded (1)   Award Emails
- $500 of $2,700 awarded.
- 1 of 2 awarded.   Build Report
View Last Year's Winners

Applicant	SNAP	Award Type	Award Date	Meets Criteria?	Next Steps
	👤	$500.00 - Annual	04/21/2015	🔍 View Details	**Thank You Letter:** 🔴 Incomplete

Modify / Withdraw Awards

Details   Close Awarding

STEP 3: Select the radial button by the student's name that will receive a modified award and select **Modify Selected Awards.**

Award Fund - Nieka "Sean" Wright Fellowship

◆ Review Candidates

Help - Awarding Guidelines

New award(s) must total: **$2,200 or less.**   «Some Quick Math»
Minimum Applicant Award: **None**
Maximum Applicant Award: **None**

Withdraw
Removes just the award for this academic year.

Candidates Already Awarded (1)
- $500 of $2,700 awarded.
- 1 of 2 awarded.

Modify	Applicant	SNAP	Award Type	Award Date	Action
☐		👤	$500.00 - Annual	4/21/2015 9:31:04 AM	Withdraw

⬍ Details   Modify Selected Awards

STEP 4: Update the award information, as needed. For example, if the student will not receive an award amount for fall and spring, enter the amount in the appropriate term. Usually this entails removing a spring amount.   Select **Save Award Information**.

Award Fund - Nieka "Sean" Wright Fellowship

◆ Review Candidates

Help - Awarding Guidelines

New award(s) must total: **$2,700 or less.**   «Some Quick Math»
Minimum Applicant Award: **None**
Maximum Applicant Award: **None**

Candidates to Award (1)

Candidate	Annual Amt. (whole $'s)		Fall (whole $'s)	Spring (whole $'s)	Summer (whole $'s)
	$500	OR	$	$	$

Save Award Information   Cancel

DETERMINING ELIGIBILITY FOR NEED-BASED AID

The image below demonstrates how a student's eligibility for need-based can be determined within Next Gen. The **Z_Gross Need** column indicates the amount of need-based aid the student can receive. If a student has not completed the FAFSA, there will not be a number in the **Z_EFC** column.

		PDF	SNAP	Candidate	Current Awards	Z_Department	Z_EFC	Z_First Term Attended	Z_Gross Need	Z_Level	Z_Major	z_Nonfed Loan	Z_UNCW Student ID
1.	☐	📄	👤		0		0	201410	19,758.89	Graduate		no data	
2.	☐	📄	👤		0		no data	201310	0	Graduate		0	
3.	☐	📄	👤		0		no data	201480	0	Graduate		no data	
4.	☐	📄	👤		0		5240	201110	16,228.44	Graduate		no data	
5.	☐	📄	👤		0		9081	201110	15144	Graduate		no data	
6.	☐	📄	👤		0		0	201610	24225	Graduate		no data	

Data View: Show Chairperson Options · Set Committee Preferences

Note: If your view of the student information does not contain the same items as headers, select the **Details** button beneath the names to reveal the various options and add them to the bar. Select the item and save the selections.

STEP 1: Select Build Report.

STEP 2: Select items for the content of the report under the Field Selection Tab.

Create a Report
Review Candidates

Help - Committee Report Help Guide
Use the options below to create a report. View the help guide above for additional details.

Currently Selected Select Fields: First Name, Last Name, Fund Name, Amount

Field Selection | Filter By | Order By

Select options from: Candidate Demographic Information
- ☑ First Name
- ☑ Last Name
- ☐ Permanent Address Line 1
- ☐ Permanent City
- ☐ Permanent Phone
- ☐ Middle Name
- ☐ Email Address
- ☐ Permanent Address Line 2
- ☐ Permanent Zip

Select options from: Fund Basics
- ☑ Fund Name
- ☐ Fund Description

Select options from: Award Information
- ☑ Amount
- ☐ Award Date

Select options from: Additional Information
- ☐ Include Removed Candidates
- ☐ Soft Points

Select options from: Candidate Information
- ☐ COM_academic ability
- ☐ COM_Employment
- ☐ COMM_Essay - leadership and service (B Welch)
- ☐ GEN_Community
- ☐ COM_aptitude and achievements
- ☐ COM_Employment verification
- ☐ COMM_Essay Social Change (J Thompson)
- ☐ GEN_Community Service Y/N

Search for Candidates

STEP 3: On the **Filter By** tab, select the information you would like to appear on the report. You can select the awarded students or all candidates. Select **Search for Candidates** to run the report.

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Committee Access Form
Next Gen Scholarship Fund

Academic Year: _____   Fund: _____   Budget Authority: _____

Department: _____   Organization: _____

The Next Gen scholarship software enables a committee structure for the selection of award recipients. When ranking candidates, committee members can enter comments and/or scores for candidates. Although committee members cannot see the comments of other committee members, individuals with the designation of Chairperson can see the comments/scores of each committee member. Enter the name of the individual(s) to serve as a committee member.

Name _____

E-mail _____   Chair Designation? _____

Name _____

E-mail _____   Chair Designation? _____

Name _____

E-mail _____   Chair Designation? _____

Name _____

E-mail _____   Chair Designation? _____

Budget Authority E-Signature   Grant Officer E-Signature (if applicable)

[Submit]

If electronic signatures are not available, please print, date & sign below.   [Print]

Budget Authority Signature: _____   Date _____

Grant Officer Signature (if applicable) : _____   Date _____

Administrative Use Only: FINAID FUND CODE   NAME OF ASSIGNED SCHOLARSHIP COMMITTEE

_____   _____

Next Gen
Scholarship Item Setup

Department [   ]   Fiscal Year [   ]

Budget Authority [   ]   Extension [   ]

Authority Contact [   ]   Extension [   ]

Title [   ]

Fund Amount [   ]   Fund Code [   ]

Organization Code [   ]   Account Number [   ]

Title [   ]

Fund Amount [   ]   Fund Code [   ]

Organization Code [   ]   Account Number [   ]

[   ]

Title [   ]

Fund Amount [   ]   Fund Code [   ]

Organization Code [   ]   Account Number [   ]

Maximum Number of Award Recipients [   ]   Maximum Award Amount [   ]   Need Based? ◯ Yes   ◯ No

Minimum GPA (if any) [   ]   Minimum Enrollment Hours (if any) [   ]

Budget Authority Signature

Grant Officer Signature (if applicable)

[Submit]
[Print]

Finaid Fund Code [   ]   Name of Assigned Scholarship Committee [   ]

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2017 Spring Workshops

Date		Time
January 27, 2017		10:00 am – 11:00 am
January 31, 2017		11:00 am – 12:00 pm
February 13, 2017		11:00 am – 12:00 pm
February 17, 2017		10:00 am – 11:00 am
February 28, 2017		11:00 am – 12:00 pm
March 14, 2017		11:00 am – 1200 pm
March 17, 2017		10:00 am – 11:00 am
March 28, 2017		11:00 am – 12:00 pm
March 31, 2017		10:00 am – 11:00 am

All sessions are held in HO 249.

Please email scholarships@uncw.edu to indicate if you plan to attend.