University of North Carolina Wilmington
Office of Scholarships & Financial Aid

Next Gen Scholarship Software
User Manual

Graduate Programs
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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 Office of Scholarships & Financial Aid (OSFA) is responsible for managing the application of aid to students 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, 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. Next Gen integrates data stored in Banner as part of the candidate profile, providing a central location to access to student data, such as major, GPA, number of completed hours and number of transfer hours, residency, etc.

ELIGIBILITY DETERMINATION – Many funds have unique eligibility criteria. The software can restrict the applicant pool based upon the eligibility criteria and only display the applicant information for the eligible candidates. For need-based awards, departments can 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. 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 addresses basic user processes for funds that are not associated with a donor agreement. More detailed assistance is accessible within the Help Center of the software.
SECTION II: USERS

LEVELS OF USER ACCESS
Member – access to view candidate data and enter evaluation comments for candidates

Member with Awarding Capabilities – access to view candidate data, enter evaluation comments for candidates, and enter award information for recipients

GRANTING/CHANGING ACCESS
The COMMITTEE ACCESS FORM (page 14) – Submit this form to indicate individuals authorized to access funds within an org or to remove individuals who no longer have access. This is a fillable form accessible at www.uncw.edu/finaid/forms.

SECTION III: PROCESS

INSTITUTIONAL FUNDS FROM THE GRADUATE SCHOOL
Use the Next Gen software to award the Non-Resident Tuition Remission, Need-based Tuition Scholarship, Unrestricted Tuition Scholarship and New Scholar Awards. Departments with university funded fellowships also use the software to communicate the award information. Email scholarships@uncw.edu if you experience a problem.

RESEARCH GRANTS/TRUST FUNDS
The Budget Authority must provide the OSFA the amount(s) for the award item each academic year.

- For a new fund (previously not used for scholarships) complete the Next Gen Scholarship Entry form (page 15) to establish the item within the university's accounting system.
- For an existing fund, the department must provide the total amount to be awarded for the academic year. Departments should email the following information to scholarships@uncw.edu. The use of a spreadsheet is encouraged if communicating information for multiple items. Include:
  a. Item name and/or finaid fund code
  b. Award amount, and
  c. Number of recipients

<table>
<thead>
<tr>
<th>Item Name</th>
<th>Finaid Fund Code</th>
<th>Award Amount</th>
<th># of Recipients</th>
</tr>
</thead>
<tbody>
<tr>
<td>Departmental Award – OSFA</td>
<td>IDOSFA</td>
<td>$20000</td>
<td>10</td>
</tr>
</tbody>
</table>

Note: Email scholarships@uncw.edu if the award amount or number of recipients needs to be increased.
SECTION IV: TIMELINE

The timeline below considers dates and processes associated with numerous UNCW offices, such as the bill due dates for students and the end of year accounting processes.

March 1: Graduate School communicates the required information to the OSFA for the following academic year.

March 15: The OSFA uploads the award amount(s) within Next Gen.

March 15: Department may access Next Gen to enter the award information. Once entered, the awards will appear on the accounts of students within three – five days, or, in peak periods, seven – ten days.

July 1: Award entries entered by this date will appear as aid when the Student Accounts Office generates the fall semester bill for students. Adhering to this deadline alleviates the need for students to pay out of pocket and/or requesting administrative offices to “hold classes”. It also facilitates the timely generation of a refund, if applicable.

Drop/Add: After each census date, Program Coordinators must ensure that the enrollment of recipients meets the requirement for with the award.

December 1: Award entries entered by this date will appear as aid when the Student Accounts Office generates the semester bill for students. Adhering to this deadline alleviates the need for students to pay out of pocket and/or requesting administrative offices to “hold classes”. It also facilitates the timely generation of a refund, if applicable.

June 1: Entries for fall, spring or summer awards must occur by this date in order to process as a payment within the current fiscal year. Recipients of need-based funds must already be determined as eligible for need-based aid. Users will not have access to the software after this date.

SECTION V: GUIDING PRINCIPLES

- Enter award information in the annual box (for the year). The system will divide it automatically once it is added to the account. For fall graduates, enter the amount as fall only.
- Consider the billing cycle when entering awards to enable adequate time for processing. Entering award information close to a bill due date may prevent students from receiving the payment prior to an impending deadline. It may take up to 2 weeks within the OSFA to add award information to students' records, depending on the time of year. It may take additional days for processing by the Student Accounts Office to facilitate the payment to the student.
SECTION VI: ACCESSING NEXT GEN VIA MYSEAPORT

STEP 1: Select the Academics Tab.

STEP 2: Scroll down to the Finaid Scholarships Tools bar and select Next Gen.

The error message below will display.

STEP 3: Click the House Icon (pictured below) and select Committee Home /My Committees.

Note: Ensure the correct academic year is active.
SECTION VII: AWARDING CANDIDATES

IMPORTING A CANDIDATE
In absence of the use of system features to populate a list of students, the user must import the name of the recipient(s). To import a name, from the Candidate Actions drop down menu, select Import Candidate and type the student’s name. Click Import and follow the instructions above to award.
DETERMINING ELIGIBILITY FOR NEED-BASED AID - DO NOT IMPORT NAMES FOR THESE FUNDS

The Free Application for Federal Student Aid (FAFSA) determines a student’s eligibility for need-based aid. As the Office of Scholarships & Financial Aid receives completed FAFSA files from the U.S. Department of Education, the results will become available in the Next Gen scholarship software. The Need-Based Tuition Scholarship items only display the names of eligible students. Students may complete the FAFSA at any point during the academic year. To refresh the system and display all eligible candidates, from the Candidates Tab, open the Candidate Actions drop down menu and select Perform Matching.

To determine a student's level of need (how much need-based aid a student may receive), use the following computation:

**Cost of Attendance – EFC = Amount of need-based aid a student may receive**

<table>
<thead>
<tr>
<th>Z_Need (Cost of Attendance)</th>
<th>Z_Need (EFC)</th>
</tr>
</thead>
<tbody>
<tr>
<td>25308</td>
<td>0</td>
</tr>
<tr>
<td>25308</td>
<td>7480</td>
</tr>
</tbody>
</table>

In the image above, the student on line one is eligible to receive up to $25,308 in need-based aid. The student on line two can receive up to $17,828 in need-based aid.

Information regarding the cost of attendance and various tuition and fees rates are published on UNCW webpages maintained by the Office of Scholarships & Financial Aid and the Student Accounts Office.
**ENTERING AWARDS**

**STEP 1:** Select the appropriate scholarship item. In this example, Z-Test 2 is the scholarship item.

**STEP 2:** From the Candidates’ Tab, select the open box by the name of the student(s) that will receive funding. Select Award Selected Candidates tab.

**STEP 3:** Enter the award amount as an annual award; select Save Award Information. *Note: Only use the boxes for specific terms if the fall and spring amounts differ or if the recipient for the spring award is different from the fall recipient.*
MODIFYING AN AWARD

STEP 1: To change an award amount (modify or remove), from the Awarded Tab, select the Modify/Withdraw Awards button.

<table>
<thead>
<tr>
<th>Description</th>
<th>Candidates</th>
<th>Awarded</th>
<th>Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td>$46,000.00</td>
<td>$4,000.00</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Available Balance</td>
<td>Awarded Amount</td>
<td>Awarded Candidates</td>
<td></td>
</tr>
</tbody>
</table>

STEP 2: Select the open box by the student's name.
• If removing the entire award amount, select the Withdraw button.
• If reducing or increasing the amount, select the Modify/Selected Awards button.
• Update the award information, as needed. Select Save Award Information.
Determining Residency and Enrollment Status

The software displays the current residency determination and enrollment status of students. Select the **Perform Matching** option from among the Candidate Actions Tab to refresh the information.

Current – The number of hours that correspond with course enrollment

Finaid - The number of hours that determine a student's enrollment status (full or part-time)

<table>
<thead>
<tr>
<th>Z_Demographics (Residency)</th>
<th>Z_Hours Fall Current</th>
<th>Z_Hours Fall Finaid</th>
<th>Z_Hours Spring Current</th>
<th>Z_Hours Spring Finaid</th>
<th>Z_Need (Cost of Attendance)</th>
<th>Z_Need (EFC)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residency</td>
<td>6</td>
<td>no data</td>
<td>no data</td>
<td>no data</td>
<td>no data</td>
<td>no data</td>
</tr>
<tr>
<td>Residency</td>
<td>no data</td>
<td>no data</td>
<td>no data</td>
<td>no data</td>
<td>no data</td>
<td>no data</td>
</tr>
<tr>
<td>Residency</td>
<td>9</td>
<td>no data</td>
<td>no data</td>
<td>no data</td>
<td>26378</td>
<td>0</td>
</tr>
</tbody>
</table>

**Perform Matching**

Note: By refreshing the data after drop/add has ended, you can determine if a modification is needed to the award information.

If a student's residency status changes during the fall semester granting residency for the spring semester, refreshing the data will populate the new status for the spring semester.

Candidate Actions ▼ Award Sele

Basics
Set Committee Preferences
Perform Matching
RUNNING A REPORT

OPTION 1/STEP 1: On the Reporting tab, from the Field Selection tab, check items to appear on the report.

OPTION 1/STEP 2: On the Filter By tab, choose the items for the report then select Search for Candidates. The results may be exported as an Excel file.
OPTION 2: From the Candidates' Tab, select Export Data. This option generates an Excel file containing the information that appears about the candidates along the bar.
Committee Access Form - Use this form to grant an individual's access to a scholarship committee. The form is accessible at: https://uncw.edu/finaid/osfaforms.html
New Fund Item - Use this form to request setup for a new fund (grant or trust account). The form is accessible at: [https://uncw.edu/finaid/osfaforms.html](https://uncw.edu/finaid/osfaforms.html)

Scholarship Item Setup Request Form

<table>
<thead>
<tr>
<th>Department:</th>
<th>Academic Year:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Authority:</td>
<td>Phone Number:</td>
</tr>
<tr>
<td>Alternate Contact:</td>
<td>Phone Number:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Title (28 character max)</th>
<th>Account</th>
<th>Fund</th>
<th>Org</th>
<th>Amount</th>
<th># of Recipients</th>
</tr>
</thead>
<tbody>
<tr>
<td>1)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2)</td>
<td></td>
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<td>3)</td>
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<tr>
<td>4)</td>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>5)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Is full-time enrollment required? [ ] Yes [ ] No

If full-time enrollment is not required, should the fund pro-rate to mirror the enrollment status? [ ] Yes [ ] No

Indicate minimum enrollment hours, if any.

Is this a need-based fund? [ ] Yes [ ] No

Is the student required to meet the university’s standard for Satisfactory Academic Progress? [ ] Yes [ ] No

Indicate minimum GPA requirement, if any.

Enter below the message recipients should see in Banner regarding this item.

Example: This merit award requires full-time enrollment during each semester. Full-time enrollment is 12 credit hours or more for undergraduate students and nine credit hours or more for graduate students. This award may be renewed at the discretion of the award authority.

Budget Authority Signature: ___________________________ Date: ____________________

Grant Officer Signature: ___________________________ Date: ____________________