# Table of Contents

Table of Contents................................................................................................................................................. 2

Section I: Overview.................................................................................................................................................... 3

Section II: Users......................................................................................................................................................... 4

Section III: Timeline.................................................................................................................................................. 5

Section IV: Guiding Principles.................................................................................................................................. 5

Section V: Navigational Guides
Accessing Next Gen via mySeaport......................................................... 6
Reviewing Candidates.............................................................................. 7
Encumbered Funds.................................................................................. 9
Determining Eligibility for Need-Based Aid...................................... 9
Awarding Funds..................................................................................... 10
Modifying Award Information............................................................. 13
Running a Report.................................................................................. 14

Section VI: Forms
Committee Access Form......................................................................... 16
Next Gen Scholarship Setup................................................................... 17
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 17) 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. More detailed assistance 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

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 16) 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   deadline for donors to contribute for the upcoming aid-year awards
March 15      upcoming aid-year amounts represented in Next Gen
June 1        deadline to enter award information so that awards will appear account before the bills are generated for students
July          Student Accounts Office generates bills for students during the first week of July; bills are due the last week in July
September     fall semester census date; notification if an alternate recipient is needed
September     Advancement notifies students of “Thank you” letter process
January       spring semester census date; notification if an alternate recipient is needed

SECTION IV: GUIDING PRINCIPLES

• Refer to the terms of the donor agreement to determine:
  o eligibility criteria
  o ability to award full amount in fall or if the award should be split among the two semesters
  o if one candidate is required or if the award can be divided among multiple recipients
  o the award amount (set amount versus full available earnings)
• If the recipient is scheduled to graduate in the fall, award 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 Committee. 

*This will take you the scholarship software, currently the landing page for students.*

STEP 3: Select Committee Home to be directed from the student landing page to your committee view.

*Error*  
- You do not have the Student role so there are no applications available to be displayed!
**REVIEWING CANDIDATES**

Responses to questions asked on the scholarship application and student data stored in Banner may be viewed individually or collectively. To view a student’s application, select the PDF icon beside the student’s name to open their application in a separate window.

Alternatively, selecting the student’s name will enable a review of the student’s responses within the software.

When reviewing the applicant pool collectively, the headings for the data appear along the bar.
To modify the data that appears along the bar, select Set Display Preferences from the Candidate Actions drop down menu. *Items with the "Z_" prefix are obtained from Banner.*

<table>
<thead>
<tr>
<th>SHOW</th>
<th>Select</th>
<th>Z_Hours UG Institutional Hours</th>
<th>Z_UNCW Institutional Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td></td>
<td>Z_Hours UG Overall Hours</td>
<td>Verified UNCW Overall Hours</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Z_Hours UG Overall Transfer Hours</td>
<td>Verified UNCW Overall Transfer Hours</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Z_Gradute College/School</td>
<td>Verified College/School</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Z_Gradute College/School 2nd</td>
<td>Verified 2nd College/School</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Z_Gradute Department 1</td>
<td>verified Department 1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Z_Gradute Department 2</td>
<td>verified Department 2</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Z_Gradute Department 3</td>
<td>verified Department 3</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Z_Gradute Department 4</td>
<td>verified Department 4</td>
</tr>
<tr>
<td>☑</td>
<td></td>
<td>Z_Major Major 1</td>
<td>Verified Major</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Z_Major Major 2</td>
<td>verified second major</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Z_Major Major 3</td>
<td>Verified Major 3</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Z_Major Major 4</td>
<td>Verified Major 4</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Z_Major Major Concentration 1</td>
<td>Major_Concentration 1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Z_Major Major Concentration 2</td>
<td>Major_Concentration 2</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Z_Major Major Concentration 3</td>
<td>Major_Concentration 3</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Z_Major Major Concentration 4</td>
<td>Major_Concentration 4</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Z_Major Minor</td>
<td>Verified Minor</td>
</tr>
</tbody>
</table>
Determining Eligibility for Need-Based Aid in Next Gen

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. For Graduate Programs, the Tuition Scholarship for Need in Next Gen displays students that are eligible for need-based aid. To refresh the system, 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

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.
AWARDING FUNDS

Select *My Committees* from the *Awarding* Tab and select the appropriate committee option.

Select the appropriate scholarship item. In this example, Z-Test 2 is the scholarship item.

From the *Candidates’* Tab, select the open box by the name of the student(s) that will receive funding. Select the *Award Selected Candidates* tab.
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 recipient are different students.*

<table>
<thead>
<tr>
<th>Candidate</th>
<th>Annual Amt.</th>
<th>Fall</th>
<th>Spring</th>
<th>Summer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mikiela Ashley</td>
<td>$500</td>
<td>OR</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[Save Award Information] [Cancel]
Encumbered Funds

Renewable scholarships may have a portion or all of the funds encumbered. Please read below for information regarding the fund headings.

**Total Fund Amount:** This is the total amount of dollars available for this fund in this Academic Year

**Awarded Amount:** Amount already awarded to candidates.

**Encumbered:** Amount that is allocated to the prior year recipient(s)
- If the amount is zero, the funds encumbered for the prior year recipient(s) equal the current amount available to award.
- If the amount is negative (appears in parenthesis), the funds encumbered for the prior year recipient(s) are greater than the current amount available to award.
- If the amount is relatively small, such as $47, the current amount available to award is greater than the funds encumbered for the prior year recipient(s).

**Available Balance:** Is Total minus (Awarded + Encumbered) or remaining funds available to award.

**Awarded Candidates:** Number of Candidates currently awarded.
Modifying Award Information

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

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**.
RUNNING A REPORT

On the Reporting Tab, select the desired items to appear on the report from among the options for Field Selection.

On the Filter By tab, choose the scholarship items for the report then select Search for Candidates. The information may be exported as an Excel file.
A second way to generate reports is from the **Candidates' Tab**. By selecting **Export Data**, the categories along the data bar will populate and provide the option to export the data to Excel.

Candidate list for "Z - Test 2"

<table>
<thead>
<tr>
<th>First</th>
<th>Middle</th>
<th>Last</th>
<th>Student ID</th>
<th>Current Awards</th>
<th>Z_GPA</th>
<th>GPA</th>
<th>Z_Hours Level</th>
<th>Z_Major Major 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>14</td>
<td>0.00</td>
<td>3.44</td>
<td></td>
<td>Undergraduate</td>
<td>Social Work (SNK)</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td>23</td>
<td>0.00</td>
<td>3.44</td>
<td></td>
<td>Undergraduate</td>
<td>Social Work (SNK)</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>12</td>
<td>0.00</td>
<td>3.50</td>
<td></td>
<td>Undergraduate</td>
<td>Social Work (SNK)</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td>18</td>
<td>2280.00</td>
<td>3.44</td>
<td></td>
<td>Undergraduate</td>
<td>Social Work (SNK)</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
<td>26</td>
<td>1000.00</td>
<td>3.36</td>
<td></td>
<td>Undergraduate</td>
<td>Social Work (SNK)</td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
<td>74</td>
<td>0.00</td>
<td>3.39</td>
<td></td>
<td>Undergraduate</td>
<td>Social Work (SNK)</td>
</tr>
<tr>
<td>7</td>
<td></td>
<td></td>
<td>72</td>
<td>0.00</td>
<td>3.39</td>
<td></td>
<td>Graduate</td>
<td>Social Work (SNK)</td>
</tr>
<tr>
<td>8</td>
<td></td>
<td></td>
<td>47</td>
<td>1000.00</td>
<td>3.74</td>
<td></td>
<td>Undergraduate</td>
<td>Social Work (SNK)</td>
</tr>
<tr>
<td>9</td>
<td></td>
<td></td>
<td>48</td>
<td>2000.00</td>
<td>3.94</td>
<td></td>
<td>Undergraduate</td>
<td>Social Work (SNK)</td>
</tr>
<tr>
<td>10</td>
<td></td>
<td></td>
<td>48</td>
<td>0.00</td>
<td>2.87</td>
<td></td>
<td>Undergraduate</td>
<td>UC-Psychology (LAP)</td>
</tr>
<tr>
<td>11</td>
<td></td>
<td></td>
<td>37</td>
<td>1000.00</td>
<td>3.89</td>
<td></td>
<td>Undergraduate</td>
<td>Social Work (SNK)</td>
</tr>
<tr>
<td>12</td>
<td></td>
<td></td>
<td>37</td>
<td>0.00</td>
<td>3.79</td>
<td></td>
<td>Undergraduate</td>
<td>Social Work (SNK)</td>
</tr>
</tbody>
</table>
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)

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

Budget Authority Signature: ___________________________ Date ____________
Grant Officer Signature (if applicable): ___________________________ Date ____________
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>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4)</td>
<td></td>
<td></td>
<td></td>
<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-rato 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: ____________________________

(If applicable)