



University of North Carolina Wilmington
Office of Scholarships & Financial Aid

User Manual
Next Gen Scholarship Software

2018-2019 Academic Year

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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. 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 15) 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

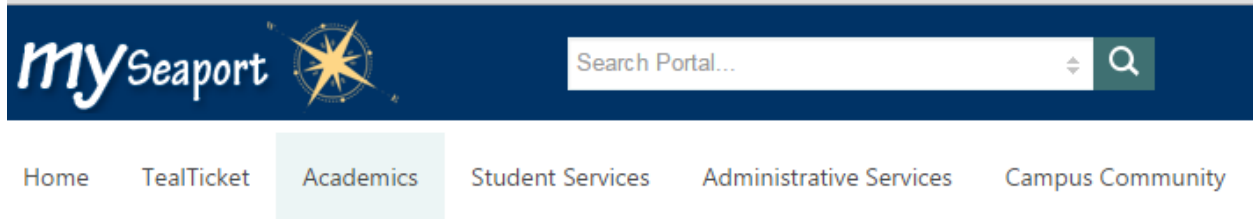
| | |
|-------------|--|
| December 31 | deadline for donors to contribute for the upcoming aid-year awards |
| March 15 | upcoming aid-year amounts represented in Next Gen |
| June 1 | deadline to enter award information; award will appear on the July bill |
| July 1 | award information communicated to award applicants |
| September | fall semester census date; notification if an alternate recipient is needed; one week deadline |
| September | Advancement notifies students of “Thank you” letter process |
| January | spring semester census date; notification if an alternate recipient is needed; one week deadline |

SECTION IV: GUIDING PRINCIPLES

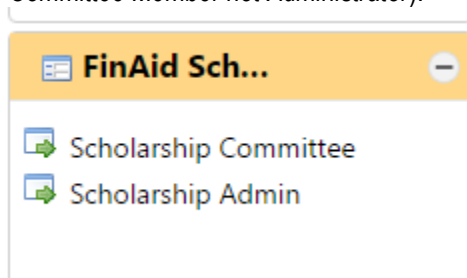
- Refer to the terms of the donor agreement to determine:
 - eligibility criteria
 - ability to award full amount in fall or if the award should be split among the two semesters
 - if one candidate is required or if the award can be divided among multiple recipients
 - the award amount (set amount versus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

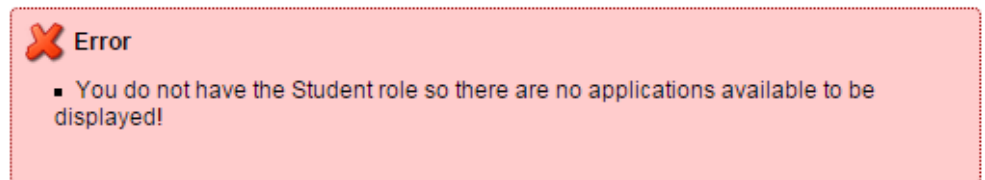
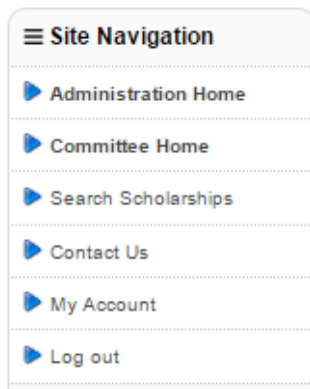


STEP 2: Scroll down to the Finaid Scholarships Tools bar and select **Scholarship Admin or Scholarship Committee**, based upon your role. (NOTE: Faculty members and Administrative Staff within Academic Departments have the role of *Committee Member not Administrator*).



This will take you to 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.



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.

The screenshot shows a dashboard with four main sections: Description, Candidates (37), Awarded (0), and Reporting. Below these are four summary cards: Total Fund Amount (\$1,000.00), Awarded Amount (\$0.00), Available Balance (\$1,000.00), and Awarded Candidates (0). A 'Candidate Actions' dropdown menu is set to 'Award Selected Candidates'. A search bar for 'Last Name' is present. Below the search bar, it says 'Remaining Awards: 1'. A table lists candidates with columns: Award, PDF, SNAP, Candidate, Student ID, Current Awards, Z_GPA GPA UG, Z_Hours Level, and Z_Major Major 1. The first row shows a candidate with a PDF icon circled in red.

| Award | PDF | SNAP | Candidate | Student ID | Current Awards | Z_GPA GPA UG | Z_Hours Level | Z_Major Major 1 | |
|-------|--------------------------|------|-----------|------------|----------------|--------------|---------------|-----------------|-------------------|
| 1 | <input type="checkbox"/> | | | [REDACTED] | 85[REDACTED] | \$0 | 3.44 | Undergraduate | Social Work (SWK) |

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

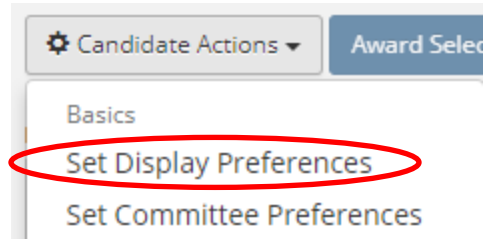
This screenshot is identical to the one above, but the candidate name in the first row of the table is circled in red.

| Award | PDF | SNAP | Candidate | Student ID | Current Awards | Z_GPA GPA UG | Z_Hours Level | Z_Major Major 1 | |
|-------|--------------------------|------|-----------|------------|----------------|--------------|---------------|-----------------|-------------------|
| 1 | <input type="checkbox"/> | | | [REDACTED] | 85[REDACTED] | \$0 | 3.44 | Undergraduate | Social Work (SWK) |

When reviewing the applicant pool collectively, the headings for the data appear along the bar.

| Award | PDF | SNAP | Candidate | Student ID | Current Awards | Z_GPA GPA UG | Z_Hours Level | Z_Major Major 1 |
|-------|-----|------|-----------|------------|----------------|--------------|---------------|-----------------|
|-------|-----|------|-----------|------------|----------------|--------------|---------------|-----------------|

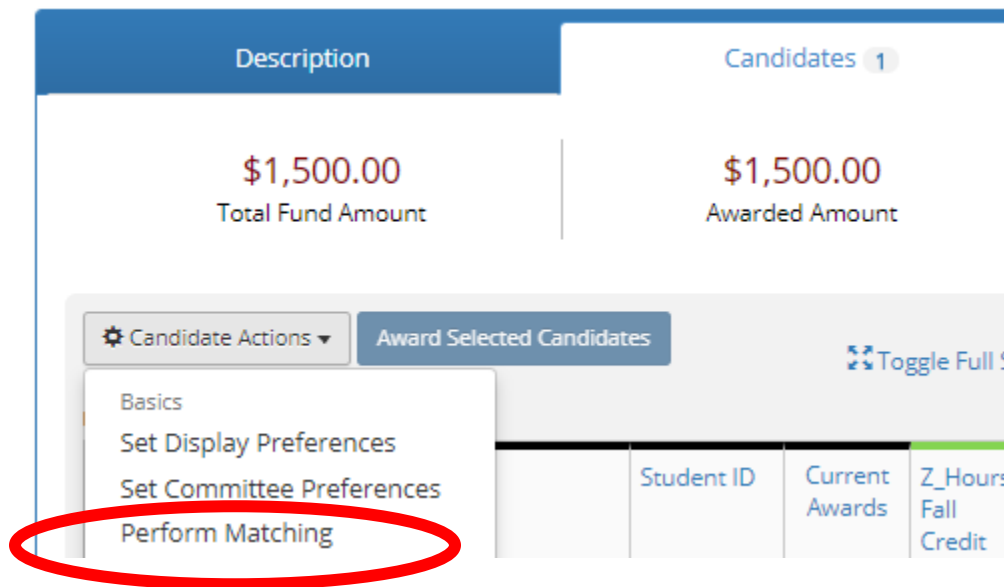
To modify the data that appears along the bar, select Set Display Preferences from the Candidate Actions drop down menu. *Items with the “Z_” prefix are obtained from Banner.*



| | | | | |
|--|---|---|-----------------------------------|--------------------------------------|
| <input type="checkbox"/> SHOW | <input type="radio"/> ↑ <input type="radio"/> ↓ | <input type="radio"/> ↑ <input type="radio"/> ↓ | Z_Hours UG Institutional Hours | Z_UNCW Institutional Hours |
| <input type="checkbox"/> SHOW | <input type="radio"/> ↑ <input type="radio"/> ↓ | <input type="radio"/> ↑ <input type="radio"/> ↓ | Z_Hours UG Overall Hours | Verified UNCW Overall Hours |
| <input type="checkbox"/> SHOW | <input type="radio"/> ↑ <input type="radio"/> ↓ | <input type="radio"/> ↑ <input type="radio"/> ↓ | Z_Hours UG Overall Transfer Hours | Verified UNCW Overall Transfer Hours |
| <input type="checkbox"/> SHOW | <input type="radio"/> ↑ <input type="radio"/> ↓ | <input type="radio"/> ↑ <input type="radio"/> ↓ | Z_Major College/School | Verified College/School |
| <input type="checkbox"/> SHOW | <input type="radio"/> ↑ <input type="radio"/> ↓ | <input type="radio"/> ↑ <input type="radio"/> ↓ | Z_Major College/School 2nd | Verified 2nd College/School |
| <input type="checkbox"/> SHOW | <input type="radio"/> ↑ <input type="radio"/> ↓ | <input type="radio"/> ↑ <input type="radio"/> ↓ | Z_Major Department 1 | verified Department 1 |
| <input type="checkbox"/> SHOW | <input type="radio"/> ↑ <input type="radio"/> ↓ | <input type="radio"/> ↑ <input type="radio"/> ↓ | Z_Major Department 2 | verified Department 2 |
| <input type="checkbox"/> SHOW | <input type="radio"/> ↑ <input type="radio"/> ↓ | <input type="radio"/> ↑ <input type="radio"/> ↓ | Z_Major Department 3 | verified Department 3 |
| <input type="checkbox"/> SHOW | <input type="radio"/> ↑ <input type="radio"/> ↓ | <input type="radio"/> ↑ <input type="radio"/> ↓ | Z_Major Department 4 | verified Department 4 |
| <input checked="" type="checkbox"/> SHOW | <input type="radio"/> ↑ <input type="radio"/> ↓ | <input type="radio"/> ↑ <input type="radio"/> ↓ | Z_Major Major 1 | Verified Major |
| <input type="checkbox"/> SHOW | <input type="radio"/> ↑ <input type="radio"/> ↓ | <input type="radio"/> ↑ <input type="radio"/> ↓ | Z_Major Major 2 | verified second major |
| <input type="checkbox"/> SHOW | <input type="radio"/> ↑ <input type="radio"/> ↓ | <input type="radio"/> ↑ <input type="radio"/> ↓ | Z_Major Major 3 | Verified Major 3 |
| <input type="checkbox"/> SHOW | <input type="radio"/> ↑ <input type="radio"/> ↓ | <input type="radio"/> ↑ <input type="radio"/> ↓ | Z_Major Major 4 | Verified Major 4 |
| <input type="checkbox"/> SHOW | <input type="radio"/> ↑ <input type="radio"/> ↓ | <input type="radio"/> ↑ <input type="radio"/> ↓ | Z_Major Major Concentration 1 | Major_Concentration 1 |
| <input type="checkbox"/> SHOW | <input type="radio"/> ↑ <input type="radio"/> ↓ | <input type="radio"/> ↑ <input type="radio"/> ↓ | Z_Major Major Concentration 2 | Major_Concentration 2 |
| <input type="checkbox"/> SHOW | <input type="radio"/> ↑ <input type="radio"/> ↓ | <input type="radio"/> ↑ <input type="radio"/> ↓ | Z_Major Major Concentration 3 | Major_Concentration 3 |
| <input type="checkbox"/> SHOW | <input type="radio"/> ↑ <input type="radio"/> ↓ | <input type="radio"/> ↑ <input type="radio"/> ↓ | Z_Major Major Concentration 4 | Major_Concentration 4 |
| <input type="checkbox"/> SHOW | <input type="radio"/> ↑ <input type="radio"/> ↓ | <input type="radio"/> ↑ <input type="radio"/> ↓ | Z_Major Minor | Verified Minor |

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**.*



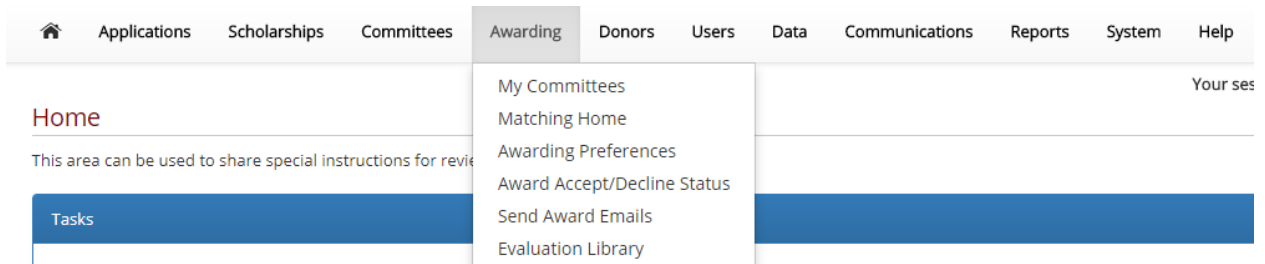
To determine a student's level of need (how much need-based aid a student may receive), use the following computation:

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

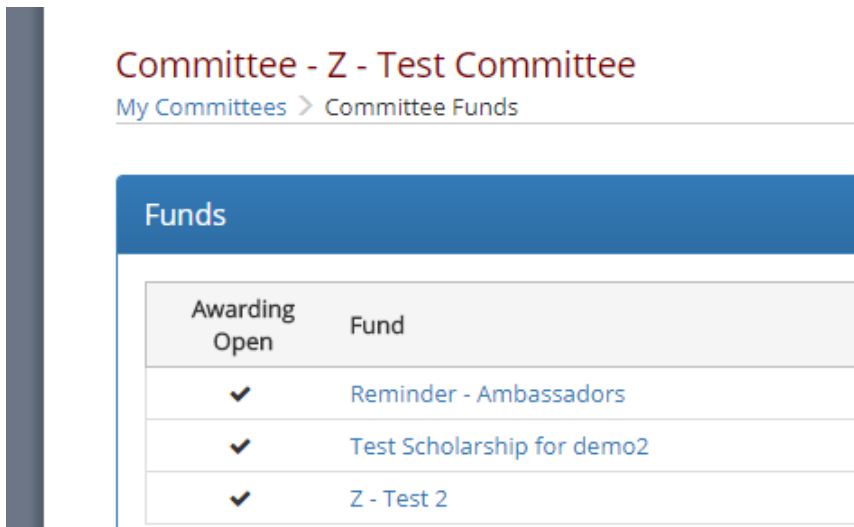
Information regarding the cost of attendance and various tuition and fees rates are published on UNCW webpages maintained by the [Office of Scholarships & Financial Aid](#) and the [Student Accounts Office](#).

AWARDING FUNDS

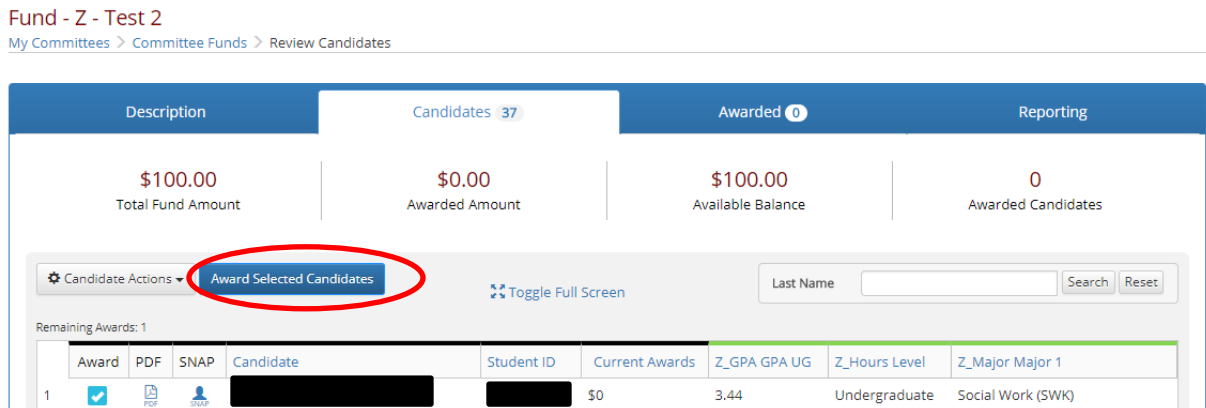
Select **My Committees** from the **Awarding** Tab and select the appropriate committee option.



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.*

| Candidate | Annual Amt. | OR | Fall | Spring | Summer |
|----------------|-------------|----|------|--------|--------|
| Mikiela Ashley | \$ 500 | | \$ | \$ | \$ |

Save Award Information Cancel

To add a name that does not appear as a candidate, 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.

- Basics
 - Set Display Preferences
 - Set Committee Preferences
 - Perform Matching
 - Export Data
- Evaluation Options
 - Show Chairperson Data
- Candidates
 - Award All Candidates
 - Import Candidate**
 - Remove Selected Candidates

Import Candidate - Z - Test 2

Search by Name

madison lindsey

[redacted] (ID:850 [redacted]@uncw.edu)



MODIFYING AWARD INFORMATION

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

| Description | Candidates 2 | Awarded 2 | Reporting | | |
|----------------------------------|------------------------------|-------------------------|---|-----------------|------------|
| \$46,000.00 Available Balance | \$4,000.00 Awarded Amount | 2 Awarded Candidates | Close Awarding Send Award Emails View Last Year's Winners | | |
| Applicant | SNAP | Award Type | Award Date | Meets Criteria? | Next Steps |
| [Redacted] | SNAP | \$2,000.00 - Annual | 08/09/2017 | View Details | |
| [Redacted] | SNAP | \$2,000.00 - Annual | 08/09/2017 | View Details | |

Modify / Withdraw Awards

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.

| Modify | Applicant | SNAP | Award Type | Award Date | Action |
|-------------------------------------|------------|------|---------------------|----------------------|----------|
| <input checked="" type="checkbox"/> | [Redacted] | SNAP | \$2,000.00 - Annual | 8/9/2017 12:41:41 PM | Withdraw |
| <input type="checkbox"/> | [Redacted] | SNAP | \$2,000.00 - Annual | 8/9/2017 12:41:41 PM | Withdraw |

Modify Selected Awards Cancel

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**.

The screenshot shows the 'Reporting' tab in a software interface. At the top, there are tabs for 'Description', 'Candidates 37', 'Awarded 0', and 'Reporting'. Below the tabs, there is a 'Committee Report Help Guide' link and a status bar that reads 'Currently Selected Select Fields: First Name, Last Name, Email Address, Fund Name, Amount'. The 'Field Selection' panel is open, showing a list of fields with checkboxes. The fields are grouped into sections: 'Candidate Demographic Information', 'Fund Basics', 'Award Information', and 'Additional Information'. The 'Field Selection' tab is active, and there are also 'Filter By' and 'Order By' tabs. A 'Search for Candidates' button is located at the bottom of the panel.

| Select options from: Candidate Demographic Information | |
|--|---|
| <input checked="" type="checkbox"/> First Name | <input type="checkbox"/> Middle Name |
| <input checked="" type="checkbox"/> Last Name | <input checked="" type="checkbox"/> Email Address |
| <input type="checkbox"/> Permanent Address Line 1 | <input type="checkbox"/> Permanent Address Line 2 |
| <input type="checkbox"/> Permanent City | <input type="checkbox"/> Permanent Zip |
| <input type="checkbox"/> Permanent Phone | |

| Select options from: Fund Basics | |
|---|---|
| <input checked="" type="checkbox"/> Fund Name | <input type="checkbox"/> Fund Description |

| Select options from: Award Information | |
|--|-------------------------------------|
| <input checked="" type="checkbox"/> Amount | <input type="checkbox"/> Award Date |

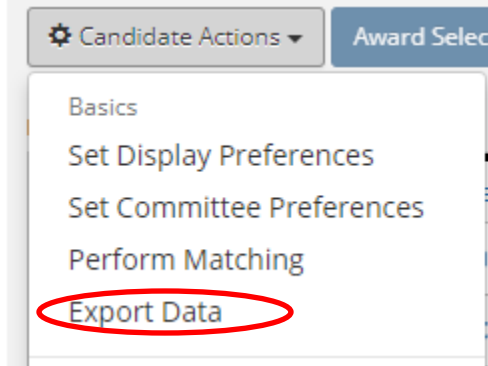
| Select options from: Additional Information | |
|---|--------------------------------------|
| <input type="checkbox"/> Include Removed Candidates | <input type="checkbox"/> Soft Points |

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.

The screenshot shows the 'Reporting' tab in a software interface. At the top, there are tabs for 'Description', 'Candidates 37', 'Awarded 0', and 'Reporting'. Below the tabs, there is a 'Committee Report Help Guide' link and a status bar that reads 'Currently Selected Filter By - Awarded Fields: Test Scholarship for demo2'. The 'Filter By' panel is active, showing a list of filter options. The 'Filter By' tab is active, and there are also 'Field Selection' and 'Order By' tabs. A 'Search for Candidates' button is located at the bottom of the panel.

| Awarded | Candidate | Fund |
|--|---------------------------------|----------------------------|
| <input type="radio"/> Awarded | <input type="radio"/> Candidate | Reminder - Ambassadors |
| <input checked="" type="radio"/> Awarded | <input type="radio"/> Candidate | Test Scholarship for demo2 |
| <input checked="" type="radio"/> Awarded | <input type="radio"/> Candidate | Z - Test 2 |

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"

| | First | Middle | Last | Student ID | Current Awards | Z_GPA GPA UG | Z_Hours Level | Z_Major Major 1 |
|-----|-------|--------|------|------------|----------------|--------------|---------------|----------------------|
| 1. | | | | 44 | 0.00 | 3.44 | Undergraduate | Social Work (SWK) |
| 2. | | | | 95 | 0.00 | 3.64 | Undergraduate | Social Work (SWK) |
| 3. | | | | 72 | 0.00 | 3.50 | Undergraduate | Social Work (SWK) |
| 4. | | | | 18 | 2250.00 | 3.44 | Undergraduate | Social Work (XSWK) |
| 5. | | | | 26 | 1000.00 | 3.36 | Undergraduate | Social Work (SWK) |
| 6. | | | | 74 | 0.00 | 3.39 | Undergraduate | Social Work (SWK) |
| 7. | | | | 92 | 0.00 | | Graduate | Social Work (MSW) |
| 8. | | | | 47 | 1000.00 | 3.74 | Undergraduate | Social Work (XSWK) |
| 9. | | | | 30 | 2000.00 | 3.94 | Undergraduate | Social Work (SWK) |
| 10. | | | | 48 | 0.00 | 2.57 | Undergraduate | UC-Psychology (1APS) |
| 11. | | | | 13 | 1000.00 | 3.59 | Undergraduate | Social Work (XSWK) |
| 12. | | | | 87 | 0.00 | 3.79 | Undergraduate | Social Work (XSWK) |



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 | <input type="text"/> | | |
| E-mail | <input type="text"/> | Chair Designation? | <input type="text"/> |
| Name | <input type="text"/> | | |
| E-mail | <input type="text"/> | Chair Designation? | <input type="text"/> |
| Name | <input type="text"/> | | |
| E-mail | <input type="text"/> | Chair Designation? | <input type="text"/> |
| Name | <input type="text"/> | | |
| E-mail | <input type="text"/> | Chair Designation? | <input type="text"/> |

Budget Authority E-Signature

Grant Officer E-Signature (if applicable)

Submit

Print

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

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