University of North Carolina Wilmington
Office of Scholarships & Financial Aid

User Manual

Next Gen Scholarship Software

2020-2021 Academic Year

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SECTION I: OVERVIEW

CONTEXT

Financial aid is money to help pay for expenses associated with obtaining college education and includes grants, loans, work-study, and scholarships. Scholarships may be awarded based on merit or academic achievement, financial need, or a combination of both, depending on the intent of the scholarship donor.

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

Awards in Next Gen are generally one of three types:

1. A scholarship funded by an external donor
   a. These require completion of the UNCW Scholarship Application, and often have special requirements outlined in the Scholarship Donor Agreement negotiated with Advancement. Most undergraduate awards fall into this category.
2. A scholarship/award funded by institutional funds
   a. These may require completion of the UNCW Scholarship Application, but some may not. Refer to the award description for more information about these types of awards, and email scholarships@uncw.edu if you have any questions. Institutional or departmentally funded scholarships can be at the undergraduate or graduate level. New institutional or departmentally funded scholarships/awards require the submission of the Scholarship Setup Form (available at www.uncw.edu/finaid/forms).
3. A scholarship/award funded by research grants or trust funds
   a. These awards generally do not require completion of the UNCW Scholarship Application. New externally funded awards require the submission of the Scholarship Setup Form.
      i. If the award was created in a previous year, and will be used in a future year, the Budget Authority for the award must provide the funding levels for the new Academic Year by emailing scholarships@uncw.edu. Include:
         1. Item name and/or FINAID fund code
         2. Total award amount
         3. Maximum number of recipients

PURPOSE

Next Gen is a comprehensive software program used by UNCW to manage the scholarship application, determine eligibility, and complete the awarding processes in a paperless environment.

APPLICATION: The software is available to users 24/7 and is accessible with a single sign on through mySeaport. Students can apply for multiple scholarships with a single application. Next Gen imports student information stored in Banner as part of the candidate profile, removing the need to ask students for known information; and with embedded smart features, applicants bypass questions that do not pertain to them.

ELIGIBILITY DETERMINATION: Many scholarships have unique selection criteria per donor intent. The software is able to match potentially eligible candidates based upon the eligibility criteria and present a qualified applicant pool for award selection. For need-based awards, departments are able to assess students' eligibility for need-based aid at the time of award selection.

AWARDING: Users at the department level identify award recipients, decide upon award amounts, and determine the award schedule in Next Gen, which produces award reports that are reviewed and monitored daily 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 to establish a non-donor fund.

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

Decision Maker: 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: Can view candidate data and enter evaluation comments for candidates

Chairperson (Award Only): Can view candidate data and enter award information for recipients. Cannot evaluate students.

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

Chairperson (Evaluate, Award and Import): Can view candidate data, import candidates, enter evaluation comments for candidates, and enter award information for recipients

GRANTING/CHANGING ACCESS

The Committee Access Form is used to indicate individuals authorized to access funds within an organization. The form is used to add users, change the level of access, or remove access to individual users. This is a fillable form accessible at www.uncw.edu/finaid/forms.

SECTION III: TIMELINE

APPLICATION DATES

- December 1 – Scholarship Application opens
- March 1 – Scholarship Application closes

AWARDING PROCESS

December 31 Deadline for donors to contribute to awards granted in the next academic year

March 2 Upcoming academic year amounts uploaded to Next Gen

March 12 10 a.m. – Deadline for committees to make selections for recruitment awards so they can be reflected on financial aid notifications. If selections cannot be made by this time, OSFA will make the selections accordingly that afternoon.

June 1 Deadline for Committees to enter award information so that awards will be reflected on students' first fall bills. If selections cannot be made by this time, OSFA will make the selections accordingly beginning on June 2, 2020.

June 2-7 Next Gen system access for committees will be inaccessible to allow OSFA to conduct award processing and reconciliation. Access will be restored on June 8, 2020.

July Student Accounts Office generates bills for students during the first week of July. Bills are due the last week in July, and classes are dropped for non-payment.

September Fall semester census date. Committee notifications made if alternate recipients are needed.

October Advancement notifies students of "Thank you" letter process

January Spring semester census date. Committee notifications made if alternate recipients are needed. Next Gen will then close for approximately a week for OSFA to conduct award processing and reconciliation.

SECTION IV: HOW-TO GUIDES

ACCESSING NEXT GEN
STEP 1: Sign in to mySeaport.uncw.edu with your UNCW username and password
STEP 2: Select the *Academics* tab.
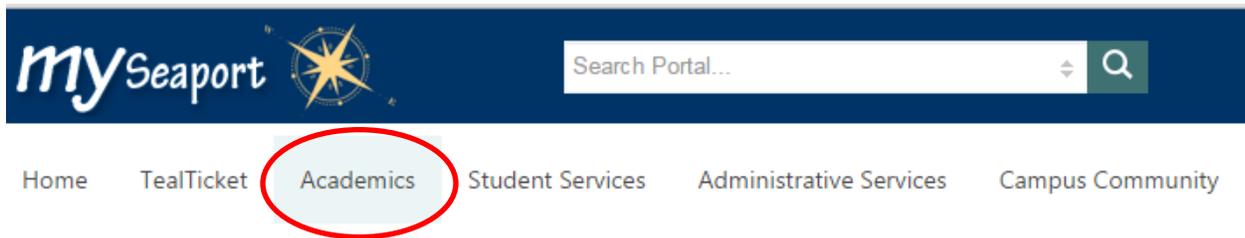
STEP 3: Scroll down to the *Finaid Scholarships Tools* bar and select Next Gen.

If you receive an access error message here, email scholarships@uncw.edu with the screen shot. It's likely you haven't been granted the appropriate committee access from your committee chairperson.

ACCESSING A COMMITTEE AND FUND
STEP 1: CLICK THE HOUSE UNCW ICON (PICTURED BELOW) AND SELECT COMMITTEE HOME /MY COMMITTEES.

STEP 2: Click on the appropriate Academic Year and the appropriate Committee.
Evaluations Open will be checked if your committee has scholarships to award. If there is not a check by your committee and you feel you do have scholarships that need to be awarded, please email scholarships@uncw.edu

My Committees

| | | Matching Home |

| | | Academic Year 2020-2021 149 | | Academic Year 2019-2020 150 | |

Evaluations Open	Committee Name	Due Date	Group Review	Actions
	Admissions	1/31/2020		Actions ▼
✓	Admissions - Crankstart	5/1/2020		Actions ▼
✓	Admissions - non donor agreement items	4/30/2020		Actions ▼
✓	Admissions - Transfer	5/1/2020		Actions ▼
✓	Admissions & Honors College	4/30/2020		Actions ▼
✓	Alfred and Anita Schnog Travel Award for Holocaust	5/2/2020		Actions ▼
	Alumni Association	10/11/2019		Actions ▼
✓	Athletics	8/1/2020		Actions ▼
✓	Auxiliary/International Programs	3/1/2020		Actions ▼
	CAS - Administration	7/3/2019		Actions ▼
	CAS - Administration - discretionary	6/1/2019		Actions ▼
	CAS - Anthropology	6/1/2019		Actions ▼
	CAS - Art and Art History	7/6/2019		Actions ▼
	CAS - Biology/Marine Biology Department - Ballard	6/1/2019		Actions ▼

STEP 3: Click on the Fund you would like to award
Confirm that Awarding is Open for the fund

OSFA
My Committees > Committee Funds

Funds

Awarding Open	Fund	Candidates	Last Matched	Awarded	Awarded $	Available $	Modify Awards
	Adult Scholars Leadership Alumni Assoc (ASLA) Scholarship - ISASLA	7	N/A	0	$0.00	$0.00	N/A
	Alice & Henry von Oesen Scholarship - ISOESN	10	N/A	5	$5,490.05	$0.01	Modify
	All Art Majors	40	N/A	0	$0.00	$0.00	N/A
	All Environmental Science Majors	104	N/A	0	$0.00	$0.00	N/A
	All Music Majors	27	N/A	0	$0.00	$0.00	N/A
	Ann Penton Longley Scholarship - ISALON	4	N/A	1	$2,408.16	$0.00	Modify
	Annie Morgan McLeod Memorial Scholarship - ISMCLE	4	N/A	0	$0.00	$0.00	N/A
	ARP NASPA Fellowship - EREG36	4	N/A	4	$2,000.00	$0.00	Modify
	Bank of America Scholarship – Ext Campus	4	N/A	0	$0.00	$0.00	N/A
	Bedford Fair Endowed Scholarship - ISBEDF	6	N/A	1	$3,038.24	$0.00	Modify
	Betty Anna Wight Memorial Scholarship - ISWIGH	75	N/A	1	$5,048.00	$0.00	Modify
	Carolyn & Martin Rabunsky Scholarship - ISRABU	3	N/A	1	$9,985.53	$0.00	Modify
✓	Denney Family Scholarship in Chemistry - ISDENN	24	8/27/2019	0	$0.00	$0.00	N/A
	Dickson Scholarship - NCSEAA fund - ISDICK	2	N/A	1	$2,370.00	$0.00	Modify
	Earl Bernard Wilson Scholarship - ISWILS	9	N/A	1	$2,152.26	$0.00	Modify

Clicking on the Fund will allow you to review information related to the award itself, as well as manage the candidate review and awarding processes. The *Description* tab will provide an overview of the award, provide a link to the Scholarship Donor Agreement (if applicable), as well as list the requirements for the award.

Denney Family Scholarship in Chemistry - ISDENN
My Committees > Committee Funds > Description

Description	Candidates 24	Renewables 0	Awarded 0	Reporting

Denney Family Scholarship in Chemistry - ISDENN   nts

The Denney Family Scholarship in Chemistry was created by Karen and Alan '86 Denney in honor of the education Alan received at UNCW. Alan credits much of his success to the foundation that he received at UNCW and hopes that this gift will help a fellow Seahawk obtain the same education. The scholarship will be used to assist students pursuing a degree offered by the Department of Chemistry.

Guidelines:
Scholarship Agreement

Fund Amount	$0.00
Minimum Applicant Award	$2,500.00
Maximum Applicant Award	None
Maximum Recipients	1

Hard Requirements

Common Requirements
1) University Scholarship Application is submitted.
2) Z_Need (EFC) <= 12,000.00
3) Z_Major 1 is Chemistry (CHM) or Chemistry (MCHM) or Chemistry (MCHM) or Chemistry (CHM) or Chemistry (MCHM) or Chemistry (MCHM) or Chemistry (CHM) or Chemistry (MCHM) or Chemistry (MCHM) or Chemistry (CHM) or Chemistry (MCHM) or Chemistry (MCHM)

Soft Requirements

Common Requirements
1) 1 Point: Z_GPA GPA UG >= 3.00
2) 1 Point: Z_GPA GPA GR >= 3.00

Here are the general GPA metrics used to generate applicant pools for merit awards:

    First-year students – 3.5 high school GPA or greater
    Returning students – 3.0 or greater
    Returning Honors students – 3.5 or greater

If you have a small applicant pool or simply wish to see students with a lower GPA, please email scholarships@uncw.edu. If a lower GPA student is selected, you can indicate that in the evaluation section for that student. If you feel any requirements are missing or included in error, please email us.

REVIEWING CANDIDATES

In order to have the most current applicant pool, from the ***Candidate Actions*** drop down menu always select Perform Matching. This could include/exclude a student who changed their major, had a grade change, or submitted a FAFSA (for need-based awards).

Clicking on the ***Candidates*** tab will allow you to review the candidate pool for the selected award. The vast majority of donor funded scholarships require completion of the UNCW Scholarship Application, as well as answering certain questions on the Application itself. Next Gen then assembles the eligible candidate pool for the selected award to allow for Committee review. Responses to the relevant questions on the Application, as well as student data imported from Banner, may be viewed on this tab, either individually or collectively.

To view a student's application, select the PDF icon beside the student's name to open his/her 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 expand the view of those items on the bar, select the Toggle Full Screen view.

The list can be sorted by any of the column headings by clicking on the heading. The information can also be exported under the *Candidate Actions* drop down menu.

To modify the data that appears along the bar:

STEP 1: From the *Candidate Actions* drop down menu, click on Set Display Preferences.

STEP 2: Click on the box next to the information you would like to see. The box will be checked and the row will turn green.

If required information is not listed as an option for review, please email us at scholarships@uncw.edu.

STEP 3: While under Candidate Actions, select Show Evaluation Info. Those who were granted access will be able to make comments on the candidates and then the Chairperson can rank the candidates should the first one not enroll or becomes ineligible. This is a candidate list from the committee of the top three candidates that were chosen during the review of candidates. ISROTA (Rota Family Scholarship) is the code followed by the ranking.

IMPORTING A CANDIDATE

While the overwhelming majority of donor funded awards require completion of the UNCW Scholarship Application, there are some types of awards, such as Graduate School awards, research grants, trust account awards, and resident assistant awards that do not. The user must import the name of the recipient(s).

STEP 1: From the *Candidate Actions* drop-down menu, select Import Candidates.
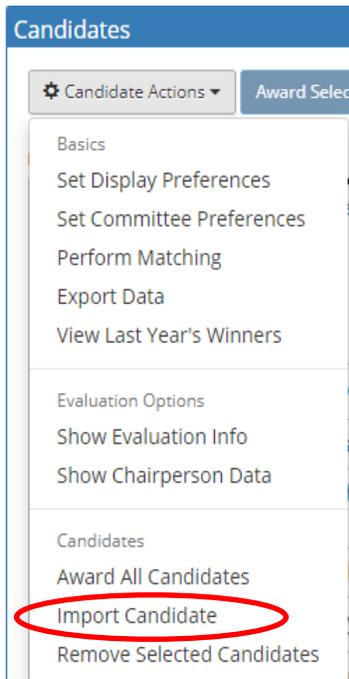
STEP 2: In the *Search by Name* field, type the name of the student you'd like to import. Then click the Search button. Depending on how precise you were in your search, there may be multiple students in the results.

STEP 3: Click the Import button next to the candidate(s) you would like to import.

Import Complete

Richard was added as a candidate.

Please Click Here to import another candidate

- OR -

If you are done, please click on the Close button in the top right to close this window.

You should not use the import function for awards that require the completion of the UNCW Scholarship Application. If you feel that you have a special situation, please email scholarships@uncw.edu.

DETERMINING ELIGIBILITY FOR NEED-BASED AID

The FAFSA determines a student's eligibility for need-based aid. As the OSFA receives completed FAFSA files from the U.S. Department of Education, this information will be imported into Next Gen.

Calculating financial need is somewhat of a complex process. Instead of requiring a calculation, OSFA has simplified this process for committees with need-based awards by using the EFC (estimated family contribution) from the FAFSA as follows:

- An EFC of ≤ 12,000 (high need) for need-based awards.
- An EFC of ≤ 20,000 (including low/moderate need) for merit awards with a secondary preference/consideration of need.

The committee can conclude that the lower EFCs represent students with high need and higher EFCs suggest the need is less.

AWARDING FUNDS

From the *Awarding* tab, select My Committees and select the appropriate committee option.
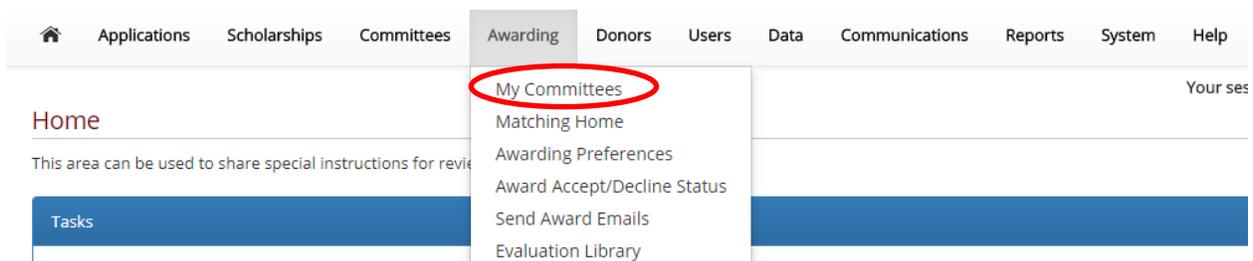
Select the appropriate scholarship item. In this example, Z-Test 2 is the scholarship item.
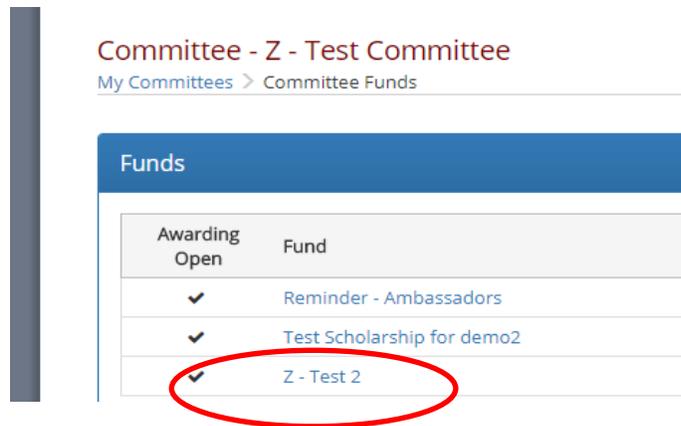
From the *Candidates'* tab, select the open box by the name of the student(s) that will receive funding. Select the Award Selected Candidates tab.
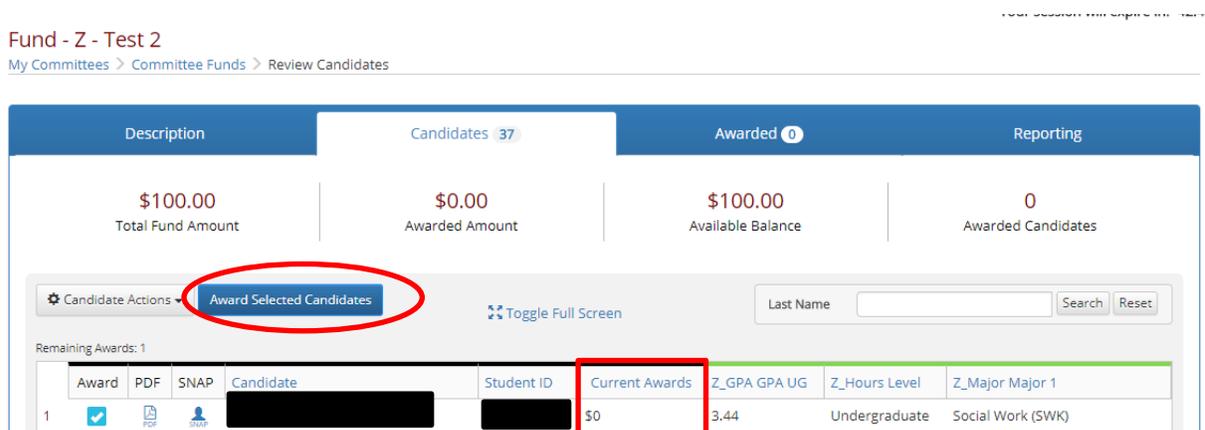
Enter the award amount as an annual award; select Save Award Information. *Note: Only use the boxes for specific terms if the fall and spring recipient are different students, or it's a fall, spring, or summer only award.*
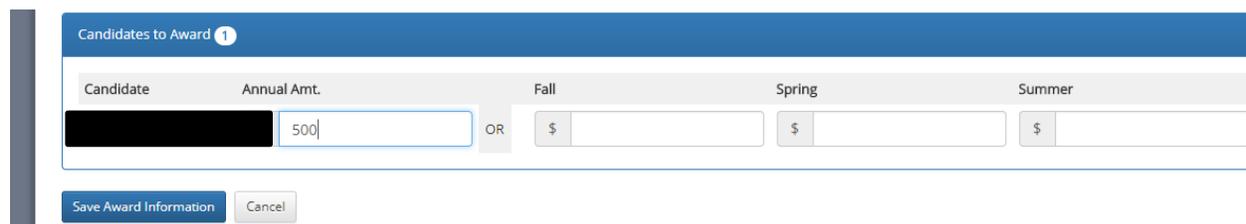
☐ There is no formal policy on awarding students multiple scholarships. However, we highly encourage awarding more students over awarding multiple awards to an individual student. For smaller awards (e.g. $500 and $1000), it may be warranted. However, for two or more larger awards, helping more students in this case may help with recruitment or retention efforts.

MODIFYING AWARD INFORMATION

You may find that you need to make changes to an existing award during the Academic Year. You may want to increase/decrease the award or withdraw the award entirely.

STEP 1: From the *Awarded* tab of the award, click on 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
▄▄▄▄▄▄▄	👤 SNAP	$2,000.00 - Annual	08/09/2017	View Details	
▄▄▄▄▄▄	👤 SNAP	$2,000.00 - Annual	08/09/2017	View Details	

Modify / Withdraw Awards

STEP 2: Click on the box next to the student's name. A check mark should appear.
STEP 3: Once checked, click on the Modify SelectedAwards button if making a change to the award
STEP 4: Click on the Withdraw (most awards) or Revoke (with renewables – screenshots in next section) button if removing the award entirely

Candidates Already Awarded 2

- $4,000.00 of $50,000.00 awarded.
- 2 of 50 awarded.

Modify	Applicant	SNAP	Award Type	Award Date	Action
☑	▄▄▄▄▄▄	👤 SNAP	$2,000.00 - Annual	8/9/2017 12:41:41 PM	Withdraw
☐	▄▄▄▄▄▄	👤 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.

Candidates to Award 1

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

Save Award Information   Cancel

If you learned that this student was graduating in the fall, you could remove the 500, place 250 in Fall, and then select a second selection for spring only. Once done, Save Award Information. If the scholarship recipient number is set to "1", you will need to email scholarships@uncw.edu to ask that it be increased to "2" for this second recipient.

RENEWABLE AWARDS

Some awards may be granted to a recipient for multiple years. Those that require an automatic renewal review are set up accordingly by OSFA and will need to be reviewed by the committee each March before looking for a new recipient(s) to award. These awards typically require the recipient to meet certain requirements in order to continue to receive the award (e.g. submission of the scholarship application or maintaining a certain GPA). For awards that are renewable at the discretion of the committee, these won't be automatically set up and selection will be made each year via the regular candidate review and awarding process. It is important to review the award information and/or Scholarship Donor Agreement to determine renewability requirements. In order to prevent overspending of the award, renewable scholarships may have funds encumbered. These encumbered funds may prevent new awards from being made. 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)

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

- Available funds = $0: The award is entirely and exactly encumbered for the future year.
- Available funds < $0: The award is over-encumbered; more funds are required to renew previous awards than there are available funds in the future year.
- Available funds > $0: The award has available funds for the future year in this amount. After all potential renewals are accounted for, this is how much money is left to make awards. If this amount is relatively small (e.g. $50 in additional interest accrued), this increase can be added to a current recipient(s) instead of a new recipient being selected for the small amount available.

Awarded Candidates: Number of Candidates currently awarded.

Description	Candidates 113	Renewables 113	Awarded 0	Reporting
$3,500,000.00 Total Fund Amount	$0.00 Awarded Amount	$563,308.00 Encumbered	$2,936,692.00 Available Balance	0 Awarded Candidates

The box to the left of the student's name should be selected. Since the system shows that the student is eligible for renewal (Yes – clicking here will show why they are eligible), Confirm Installment can be selected. If the *Eligible?* answer was No, then Revoke would need to be selected and then you'd be given the opportunity to comment on why the award is being revoked.

My Committees > Committee Funds > Renewables

Description	Candidates 113	Renewables 113	Awarded 0	Reporting

$563,308.00	113	0	0
Encumbered Amount	Renewable Candidates	Confirmed Renewals	Revoked Candidates

Select Max (100)	SNAP	Applicant	Award Type	Status	Eligible?	Revoke/Status
☐	👤	Julia Marie Agius	$5,000.00 - Annual	Pending	Yes	Revoke

Cancel   Confirm Installment(s)   Modify Installment(s)

These are $5000 annual awards. If you knew a student was graduating early, transferring, etc., you could Modify Installment and change it to $2500 in the Fall. They would still appear the following year as a Renewable if it wasn't the last installment year (e.g. 2 of 4 now, then 3 of 4 would be the next year and would need to be revoked).

RUNNING A REPORT

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

Description	Candidates 37	Awarded 0	Reporting

📄 Committee Report Help Guide

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

Field Selection	Filter By	Order By

Select options from: Candidate Demographic Information

☑First Name	☐Middle Name
☑Last Name	☑Email Address
☐Permanent Address Line 1	☐Permanent Address Line 2
☐Permanent City	☐Permanent Zip
☐Permanent Phone	

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

Search for Candidates

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On the **Filter By** tab, choose the scholarship items for the report then select Search for Candidates. The information will appear below the "Search for Candidates" tab with the option to export to Excel.

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.					0.00	3.44	Undergraduate	Social Work (SWK)
2.					0.00	3.64	Undergraduate	Social Work (SWK)
3.					0.00	3.50	Undergraduate	Social Work (SWK)
4.					2250.00	3.44	Undergraduate	Social Work (XSWK)
5.					1000.00	3.36	Undergraduate	Social Work (SWK)
6.					0.00	3.39	Undergraduate	Social Work (SWK)
7.					0.00		Graduate	Social Work (MSW)
8.					1000.00	3.74	Undergraduate	Social Work (XSWK)
9.					2000.00	3.94	Undergraduate	Social Work (SWK)
10.					0.00	2.57	Undergraduate	UC-Psychology (1APS)
11.					1000.00	3.59	Undergraduate	Social Work (XSWK)
12.					0.00	3.79	Undergraduate	Social Work (XSWK)

SECTION V: BEST PRACTICES

Dos:

- Notify OSFA of any Committee member changes
- Promote and encourage students to complete the UNCW Scholarship Application
- Review the Next Gen User Manual prior to awarding
- Run Matching before making an award to refresh the candidate pool
- Before awarding, review the donor agreement (if applicable) and hard requirements to familiarize yourself with donor intent
- Make awards for the Academic Year
  - If a selected recipient is scheduled to graduate in the fall, select and award a spring recipient at the same time. Award for academic year instead of splitting the amounts between fall and spring.
- Identify an alternate recipient(s) in case the selected student does not enroll or becomes ineligible using the scholarship code, rank, and other comments if desired (see page 12).
- Make award decisions and entries by the deadline.
- Review Scholarship Question text for departmental awards, and submit proposed changes to scholarships@uncw.edu each fall when contacted.
- Allow up to 4 weeks for completion of any submitted Scholarship Item Setup Request Form
  - A sizable portion of this process (in terms of time) occurs within the Business Affairs division.
- Respond to any emails or inquiries from OSFA in a timely fashion.
- Email scholarships@uncw.edu with any questions, concerns, or requests. Please be as specific as possible.
  - Specify Academic Year
  - Use specific Award Code (e.g., ISRUDD)
  - Specify Committee Name(s) (if the question/change affects multiple Committees)
  - If you are describing a potential error or problem for troubleshooting, including screenshots can be helpful to identify any potential issue.

Don'ts:

- Maintain any application process outside of the UNCW Scholarship Application (for awards that require completion of the UNCW Scholarship Application).
- Import candidates for awards that require completion of the UNCW Scholarship Application (unless authorized specifically by OSFA).
- Import candidates for need-based awards. Contact OSFA for assistance.
- Notify students of award selection.