



ECUAWard –  
the Scholarship Platform  
Information and Instructions

# ECUAWard - The campus scholarship portal

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- All campus-based scholarships are currently on the ECUAWard portal. This process was confirmed as a result of an internal audit of the campus scholarship process completed in 2021 and released to the BOT in December 2021. Currently a campus PRR is under review to set standards
- One stop location for all things scholarship related: from promoting donors and advertising opportunities, taking applications, reviewing applications with customizable rubrics and committee sizes, making awards, communicating awards to recipients, collecting thank you notes and other materials/forms for donor stewardship, creating Scholarship Information Forms (SIFs) to route to Fund Sources & Financial Aid for processing, and acts as storage cabinet of files to maintain year over year records and statistics for campus use
- ~1,200 individual opportunities on ECUAWard across all colleges/departments. 10,566 unique applicants in portal during AY21-22. ~140 reviewer groups. Over \$3.3 million in awards processed on portal for AY22-23

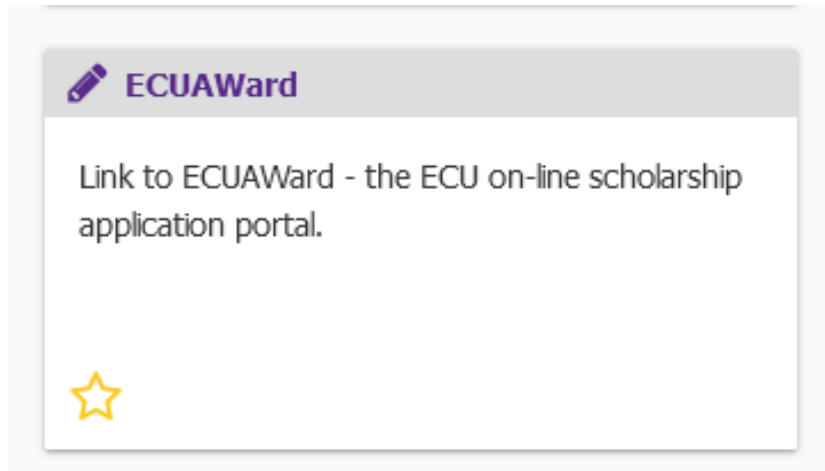
# ECUAWard - The campus scholarship portal

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- System can generate data for the preparation of the Scholarship Information Forms (SIFs)
- Survey forms no longer required if awards are processed in ECUAWard. **If an award is NOT processed via ECUAWard (these should be rare exceptions) – a manual SIF and the Survey form must be completed** and shared with Fund Source to push money to student accounts
- Tutorial information is available for students on <https://scholarships.ecu.edu>
- Tutorial information for staff is available on the Office of University Scholarships at [scholarships@ecu.edu](mailto:scholarships@ecu.edu) on the resources tab under section labeled Staff Resources

# ECUAWard - The campus scholarship portal

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ECUAWard is a link on Pirate Port

<https://ecu.academicworks.com>

Users can have multiple roles in ECUAWard:

- Administrator
- Applicant
- Reviewer
- Reference

Best to go in on Admin/Applicant tab and use Single sign-on authentication and change roles.

There are three types of opportunities on the portal:

- Auto-match
- Apply-to
- External

Naming Convention – (P) and (R)

# ECUAWard - The campus scholarship portal

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<https://scholarships.ecu.edu/>

Office of University Scholarships Intranet

## Staff Resources



**Scholarship Information  
and Forms Instructions  
(PDF)**



**Creating a Scholarship  
Information Form (SIF)  
from ECUAWard (PDF)**



**Sample ECUAWard SIF  
(PDF)**



**Scholarships Timeline  
(PDF)**



**SIF Header Information  
(Excel)**



**Blank SIF (for awards not  
processed on ECUAWard)  
(Excel)**

# Scholarship Process -Timeline

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**Mid-June** – annual cycle management conducted with review of ECUAward (AcademicWorks) system. Archive and clone processes generated by the Office of University Scholarships.

**July 1** - Financial Aid Office sends loans for origination for fall semester.

**July 10** - University Cashier originates the student fall billing statements.

**July / August** – Add new fund agreements to ECUAward so opportunities are in place for cycle that starts on August 1. The fund agreements lay out the requirements for recipient selections / donor preferences.

**August/September** – annual reminder of things to review in ECUAward (AcademicWorks portal) before opportunities go live in November. Time to review users, narratives, qualifiers, active opportunities list, etc. Annual refresher training will also be scheduled.

**August 1** – new scholarship opportunities open in ECUAward (AcademicWorks portal) for students applying for admissions in the following academic year. Most of these opportunities are housed in the Office of University Scholarships and/or the Honors College and earmarked for incoming freshmen.

**August 10** - Financial Aid Office begins to roll monies onto student accounts to ‘hold’ a student schedule. Actual disbursement comes three days prior to the beginning of classes.

**September 15** – Completed spring SIFs are due to the **Financial Services** contacts. This is for scholarships awarded to students new to the University for the spring. Any spring-only scholarships for current ECU students should have been submitted by the previous March 10th deadline.

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**October 1** – SIFs for spring admits due in **Financial Aid Office**. (These forms must have been routed through the appropriate Financial Services contacts who will submit the information to the Financial Aid Office.)

**October 1** – Students/families begin filing the annual Free Application for Federal Student Aid (FAFSA) @ <http://www.fafsa.ed.gov>

**November 1** – College/departmental scholarship opportunities open for existing students in ECUAWard (AcademicWorks portal).

**December 1** – Distribution of spendable fund balances to colleges/departments for annual departmental scholarship cycle – both endowed and unendowed accounts. (Additional spending distribution update for non-endowed funds will be distributed by January 15 annually). Spendable balances can be updated in ECUAWard (AcademicWorks portal).

**Month of January** – multiple end dates for the scholarship opportunities on ECUAWard (AcademicWorks portal) that opened on August 1 and November 1.

**Mid-January – Mid-February** – scholarship committees are meeting and making recipient selections.

**Feb 15-28** – preparation of Scholarship Information Forms (SIFs) for the following academic year are prepared, reviewed, and routed to Fund Managers, Foundations, and Financial Aid for approval and processing.

**February 15** - Completed summer scholarship information forms (SIFs) are due to the **Financial Services** contacts.

**February 28** - SIFs for summer terms are due in **Financial Aid Office**. (These forms must have been routed through the appropriate Financial Service contacts before submission to Financial Aid Office.)

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**March 1** - SIFs for fall-spring are due to FUND SOURCE contacts. (These forms must have been routed through the appropriate Financial Services contacts, who will submit the information to the Financial Aid Office. This submission represents the vast majority of the scholarships awarded to ECU students.) Note that the awards to incoming freshmen will have processing priority in order to meet the deadline for producing Comprehensive Award Letters for the Pirates Aboard event (Admitted Students Day) each spring.

**March 8** - SIFs for fall-spring are due in Financial Aid. (These forms must have been routed through the appropriate Financial Services contacts, who will submit the information to the Financial Aid Office. This submission represents the vast majority of the scholarships awarded to ECU students.)

**Mid-March** - Financial Aid Office will mail the first round of grant/loan award letters to fall entering freshmen students – this will be a comprehensive award letter including all scholarships, grants and loans. Information must be in mail 10 days before Pirates Aboard event.

**Mid-April** – Financial Aid Office will package aid for returning students and communicating the awards to students via Pirate Port.

**May 1** – ECU Enrollment deposit deadline.

Items highlighted in **GREEN** relate to important dates relative to annual cycle of ECUAward (AcademicWorks scholarship portal)

Items highlighted in **YELLOW** relate to important dates relative to submission of scholarship award information.





These current deadlines were carefully formulated based on actual time it takes to physically enter scholarships BEFORE award letters run so that students will know how much aid they will be receiving to help pay their tuition bill.

We must have time to enter all aid and manually revise aid as necessary BEFORE disbursement.

# Some Financial Aid & Scholarship Terms

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- Cost of attendance or **COA**: The cost of attending ECU for a given academic period. (includes tuition & fees, room & board, books & supplies as well as other expenses determined necessary to be a student)
- Estimated Family Contribution or **EFC**: Is the outcome of a Federal formula that looks at family size, number of family members in college, type and amount of family income. It is merely a measure of the family's ability to assist with college costs
- Need:  $COA - EFC = \text{Need}$
- Merit: Academic ability
- Scholarships: Funds that do not require repayment. Can be need based, merit based or a combination of the two
- Comprehensive Award Letter – sent to incoming freshmen in early March includes loans, grants, and scholarships offered to offset enrollment costs

# What are some consequences of a late submission?

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- Scholarships received after deadlines are not guaranteed to be in place before student bills are due. Bills are generally due 3 weeks prior to the start of classes for any term.
- Late submissions very frequently put students over budget or need which makes us (ECU) instantly out of compliance with federal guidelines. If an award is late, Financial Aid generally has to swap money if student has been packaged to COA.
- Revisions that have to be done as a result of late scholarships can potentially cause student to actually owe funds back to ECU.



# An Example of what can happen with a Late Award

Example 1:

\$15,000 COA - \$5,000 EFC = \$10,000 Need

Need Based Aid

\$4,000 Subsidized loan  
\$5,000 Grants  
+\$1,000 Outside Scholarship  
10,000



Non-Need Based Aid

\$5,000 Unsubsidized loan



Total Aid

\$15,000

A \$2000 scholarship comes in late.  
We must return \$2,000 of the subsidized loan. Several departments are involved in this process and takes up to 30 days on average to complete.  
This means no net refund for the student.



# An Example of what can happen with a Late Award

Example 2:

$$\$15,000 \text{ COA} - \$9,000 \text{ EFC} = \$6,000 \text{ Need}$$

Need Based Aid

\$2,000 Outside Scholarships  
+ \$4,000 State Grant (all or nothing)  
\$6,000



Non-need Based Aid

\$5,000 Unsubsidized loan



Total Aid

\$11,000

A \$3,000 scholarship comes in late.  
We must cancel \$4,000 of the State Grant.  
That means the student is left owing \$1,000 back to ECU.



# Prizes / Awards versus Scholarships / Fellowships – It ALL Financial Aid

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## Prize

- Include cash, cash-equivalents (such as gift cards), tangible personal property, and complimentary services.
- Payment won in a contest that does not have to be used for educational expenses.

*Information from IRS Publication 970*

Regardless of what you call it – it has to flow through Financial Aid and fit within the student's Cost of Attendance (COA).

Before alerting students of prizes or awards you should always check with Financial Aid to make sure the funds will not harm the student and cause them to lose other funding.

## Scholarship/Fellowship

- Unrestricted, non-service related funding for the purpose of aiding undergraduate/graduate students' study, training or research.
- Synonyms include grant, award, stipend, etc.
- An amount paid for the benefit of a student at an educational institution to aid in the pursuit of study or research.

*Information from IRS Publication 970*

# Spendable Balance Reports

								<b>Enrollment Services</b>	
								<b>Non-Endowed Fund Balances</b>	
								<b>as of November 20, 2022</b>	
<b>Fund</b>	<b>Detail Code</b>	<b>Description</b>	<b>ORG</b>	<b>Department</b>	<b>Fund Manager</b>	<b>Cash Balance 11/20/22</b>	<b>Spring 2023 Scholarships</b>	<b>Total Available for AY23-24 Scholarships</b>	
ET3369	E476	Chan Priority Sch Min	512102	AAH Admissions	Angela Anderson	1,116.55	-	1,116.55	
ET3650	F299	Harold H Bate Study Abroad Fund	512102	AAH Admissions	Angela Anderson	15,125.00	-	15,125.00	
EU3153	F344	UW Daughters for Dads Endowed Sch	512102	AAH Admissions	Angela Anderson	1,000.00	(1,000.00)	-	
EU3172	F392	UW BC Walters LA Public Service Sch	512102	AAH Admissions	Angela Anderson	2,500.00	(500.00)	2,000.00	
EU3196	F439	UW Lamb J & A End Schl	512102	AAH Admissions	Angela Anderson	706.15	(675.00)	31.15	
EU3245	F534	UW Maynor T&J End Schlr	512102	AAH Admissions	Angela Anderson	5,050.00	(1,000.00)	4,050.00	
EU3268	F589	UW Veneziano Family Beacon Sch	512102	AAH Admissions	Angela Anderson	1,500.00	(500.00)	1,000.00	
EU3727	E981	UW Murphy Chris Schlr	512102	AAH Admissions	Angela Anderson	4,078.00	(1,250.00)	2,828.00	
EU3808	F090	UW Whitman Organ Donor Schlr	512102	AAH Admissions	Angela Anderson	5,300.00	(500.00)	4,800.00	
EU3822	F279	UW Paul D&V EN Recruitment Schlr	512102	AAH Admissions	Angela Anderson	3,750.00	(1,250.00)	2,500.00	
EU4276	E804	UW Bolick TE Schlr	512102	AAH Admissions	Angela Anderson	-	-	-	

# Spendable Balance Calculation Example

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	2014	2015	2016	2017	2018	Total
<u>EC3791 (Corpus)</u>						
Gifts	\$ 50,425.00	\$ 7,750.00	\$ 2,675.00	\$ 7,445.00	\$ 1,500.00	\$ 69,795.00
<u>ER3791 (Restricted Earnings)</u>						
Fees	\$ (1,899.00)	\$ (302.31)	\$ (379.58)	\$ (948.58)	\$ (1,259.90)	\$ (4,789.37)
Investment Income	\$ 3,489.00	\$ 1,658.10	\$ (2,205.98)	\$ 809.58		\$ 3,750.70
Total ER3791	<u>\$ 1,590.00</u>	<u>\$ 1,355.79</u>	<u>\$ (2,585.56)</u>	<u>\$ (139.00)</u>	<u>\$ (1,259.90)</u>	<u>\$ (1,038.67)</u>
FMV	\$ 52,015.00	\$ 61,120.79	\$ 61,210.23	\$ 68,516.23	\$ 68,756.33	
FMV % of Corpus	103.2%	105.1%	100.6%	100.3%		*

ECU Foundation funds need to be at 108% of Fair Market Value at prior June 30 to have a spendable balance distribution in December.

ECU Medical & Health Science funds need to be at 104% of Fair Market Value at prior June 30 to have a spendable balance distribution in December.



# Spendable Balance Calculations

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Various items can affect the actual FMV of an endowment and whether or not it will get a spending distribution for any given year, including, but not limited to:

- **Age of endowment** – New endowments start out underwater and have to have received sufficient investment gains to offset that.
- **Market** – The fluctuations of the market greatly impact endowment values. Even a ‘good year’ of investment returns for the Foundation’s portfolio doesn’t guarantee that an endowment’s value will be at least 108% / 104% of its corpus value (remember – each Foundation has a different corpus value requirement).
- **Timing of gifts** – The timing of gifts often can affect an endowment’s value, especially if the gifts are large and made in the middle of a fiscal year.
- **Supplemental Funds** – many donors will create a supplemental fund while “growing” their endowment to ensure that an annual award can be made.

# Scholarship Information Form (SIF) Layout

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Scholarship Information Form												
Academic Year 2023-2024									Prepared by: ECUAW - <b>INSERT YOUR NAME</b>			
Portfolio Name	Fund Manager	Fund/Org Codes	Detail Code	Last Name (imported)	First Name (imported)	Student ID (Banner ID)	Enrollment - if FT leave blank - otherwise show 3/4, 1/2 or <1/2	Award Period	Fall 2023	Spring 2024	Citizen	Notes
Pulls from ECUAWard	Insert this column	ECUAWard	ECUAWard	ECUAWard	ECUAWard	ECUAWard	Insert this column	ECUAWard	Insert this column	Insert this column		
						Find/Replace			Total will pull into form - must create a fall and spring amount for uploading into Financial Aid.			
						"@ecu.edu"						

# Completed SIF – with Data pulled from ECUAWard

Academic Year 2023-2024		Scholarship Information Form							Prepared by: ECUAWard - M Bryan				
Portfolio Name	Specific Named Scholarship	Fund Manager	Fund Code	Detail	Last Name (imported)	First Name (imported)	Student ID (Banner ID)	Enrollment - if FT leave blank - otherwise show 3/4, 1/2 or <1/2	Award Period	Fall 2023	Spring 2024	Citizen	Notes
The Access Scholarship	The Rawl Access Scholarship	Chris Dyba	EA3245 920105	F009	Allen	Edward	B00123456		Fall 2023 / Spring 2024	\$2,500.00	\$2,500.00	Y	
The Access Scholarship	The D.R. and Fran Bryan Access Scholarship	Chris Dyba	EA3692 920105	E770	Beans	Stane	B00123456		Fall 2023 / Spring 2024	\$2,500.00	\$2,500.00	Y	
The Access Scholarship	The Talton Family Access Scholarship	Chris Dyba	EE3731 920105	E934	Carrot	Cameron	B00123456		Fall 2023 / Spring 2024	\$2,500.00	\$2,500.00	Y	
The Access Scholarship	The Kathy Taft - Womens Roundtable Access Scholarship	Chris Dyba	EE3721 920105	E910	Corn	Hannah	B00123456		Fall 2023 / Spring 2024	\$2,500.00	\$2,500.00	Y	
The Access Scholarship	The West Memorial Foundation Access Scholarship	Chris Dyba	EA4267 920105	E009	Coal	Emma	B00123456		Fall 2023 / Spring 2024	\$2,500.00	\$2,500.00	Y	
The Access Scholarship	The West Memorial Foundation Access Scholarship	Chris Dyba	EA4267 920105	E009	Davis	Jacob	B00123456		Fall 2023 / Spring 2024	\$2,500.00	\$2,500.00	Y	
The Access Scholarship	The Lynn Kelso Memorial Access Scholarship	Chris Dyba	EZ3669 920105	E914	Daught	Carmen	B00123456		Fall 2023 / Spring 2024	\$2,500.00	\$2,500.00	Y	

See handout “Creating a Scholarship Information Form” on OUS Staff Resources webpage for more instructions on creating forms from the ECUAWard portal.

# Contact Information

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## **University Scholarship Office:**

Melonie Bryan – Director, Office of University Scholarships [bryanm@ecu.edu](mailto:bryanm@ecu.edu) 252.328.5816

## **Financial Aid Office:**

Laura Jarman – Asst. Director, Student Financial Aid [jarmanl14@ecu.edu](mailto:jarmanl14@ecu.edu) 252.328.6610

Julie Poorman – Director, Office of Financial Aid [poormanj@ecu.edu](mailto:poormanj@ecu.edu) 252.328.6610

## **Financial Services / Foundation Representatives:**

Heather Wiggins – Accountant, ECU Foundation [gardnerh@ecu.edu](mailto:gardnerh@ecu.edu) 252.737.5369

Mandy King – Accountant, Medical & Health Sciences Foundation [kinga@ecu.edu](mailto:kinga@ecu.edu) 252.744.2170

Mary Ann Hunter – Accountant, Institutional Trust Funds [huntermary15@ecu.edu](mailto:huntermary15@ecu.edu) 252.737.1138

Janice McGowan – Grants & Contracts Manager, Grants Administration [mcgowanj@ecu.edu](mailto:mcgowanj@ecu.edu) 252.328.9530

# A little more Contact Information

<u>Funding Source</u>	<u>Detail Code Prefix</u>	<u>Banner Fund Prefix</u>	<u>Contact</u>
<b>Alumni Association</b>	"A" Z100 – Z199		ECU Alumni Association, Inc. Attn: Candace [Candi] High MS 301 – Greenville Center <a href="mailto:HighC@ecu.edu">HighC@ecu.edu</a> 252-328-0604
<b>State Funds</b>	"B"	111 or 112	University Budget Office Attn: Dawn Quist Bldg. 165 <a href="mailto:quists@ecu.edu">quists@ecu.edu</a> 252-737-2100
<b>ECU Foundation</b>	"E" & "FO..." Z600 – Z699		ECU Foundation, Inc. Attn: Heather Wiggins MS 301 – 2205 Greenville Ctr. <a href="mailto:gardnerh@ecu.edu">gardnerh@ecu.edu</a> 252-737-5369
<b>Grants</b>	"G"	21	Grants Administration Attn: Janice McGowan MS 211 – Grants Admin. <a href="mailto:mcgowanj@ecu.edu">mcgowanj@ecu.edu</a> 252-328-9529
<b>Medical Family Practice</b>		314 or 315	DHS Controller's Office Attn: Joel Stocks MS 614 – Thomas Professional Bldg. <a href="mailto:Stocksj15@ecu.edu">Stocksj15@ecu.edu</a> 252-744-2077

<u>Funding Source</u>	<u>Detail Code Prefix</u>	<u>Banner Fund Prefix</u>	<u>Contact</u>
<b>Medical &amp; Health Science Foundation</b>	"M" Z300 – Z399		ECU Medical and Health Sciences Foundation, Inc. Attn: Amanda [Mandy] King MS 659 - Moye Blvd. <a href="mailto:kinga@ecu.edu">kinga@ecu.edu</a> 252-744-7170
<b>Pirate Club</b> (ECU Educ Foundation)	"P" Z200 – Z299		Pirate Club Attn: Brittany Stockstill MS 158 – Athletics/Ward Sports Medicine <a href="mailto:Powellb15@ecu.edu">Powellb15@ecu.edu</a> 252-737-4811
<b>Special Funds - ITF</b>	"S" & "T" Z001 – Z099	12, 14, 15 23, 24, 25, 27, 2E 31 (not 314 or 315) 6C, 6Z	Institutional Trust Funds Attn: Mary Ann Hunter MS 203 – Financial Services <a href="mailto:huntermary15@ecu.edu">huntermary15@ecu.edu</a> 252-737-1403
<b>Student Life</b>	Z400 – Z599		Student Affairs Scholars Attn: Brian Mattern MS 147 <a href="mailto:matternb@ecu.edu">matternb@ecu.edu</a> 252-328-4923
<b>ECUAWard (AcademicWorks)</b>			University Scholarships Attn: Melonie Bryan MS 173 – Enrollment Management <a href="mailto:bryanm@ecu.edu">bryanm@ecu.edu</a> 252-328-5816

## **Office of University Scholarships**

G210 Old Cafeteria Complex

<https://scholarships.ecu.edu>  
[scholarships@ecu.edu](mailto:scholarships@ecu.edu)

## **Office of Student Financial Aid**

2103 Old Cafeteria Complex

<https://financialaid.ecu.edu>  
[finaid@ecu.edu](mailto:finaid@ecu.edu)