

# Chafee Quick User Guide

Instructions to manage your payment roster.



Hello Financial Aid Officer,

To better assist you in managing your payment roster on WebGrants for Administrators website, we are providing a Quick User Guide with instructions such as how to certify a student's eligibility, confirm financial aid details, and request payments.

Currently, we are working on a Chafee Coordinator's Guide with information about the program and instructions on navigating WebGrants for Administrators. Stay tuned!

If you have any questions and/or need further assistance, please contact the Chafee team via email at [chafee@csac.ca.gov](mailto:chafee@csac.ca.gov) or call 888-294-0153, option 3.

Sincerely,

California Student Aid Commission  
Specialized Programs Unit

# When to Work Your Payment Roster

Our system updates every Monday night, which means a new group of students is awarded based on our priority selection criteria.

[What is Chafee?](#) [Chafee Eligibility](#) [Application Process](#) [Awarding Process](#) [More Information](#)

## Awarding Process

Student's completed applications are sorted by application date, and awards are offered based on the following priority selection criteria:

1. \*\* Paid renewal students who have not reached their 26<sup>th</sup> birthday as of July 1<sup>st</sup> of the award year.
2. New and \*\*\*non-paid renewal students who will be 25 years old as of July 1<sup>st</sup> of the award year.
3. New and non-paid renewal students who have dependents.
4. New and non-paid renewal students who have an unmet need of \$5,000 or more.
5. New and non-paid renewal students who have an unmet need of less than \$5,000.

\*\* Students who have received a Chafee payment.

\*\*\* Students who have not received a Chafee payment.

Upon selection for an award, students are sent payment notifications for each term.

*The majority of Chafee Grant awards are initiated during the fall term and additional awards are offered year round based on available federal and state funding each year.*

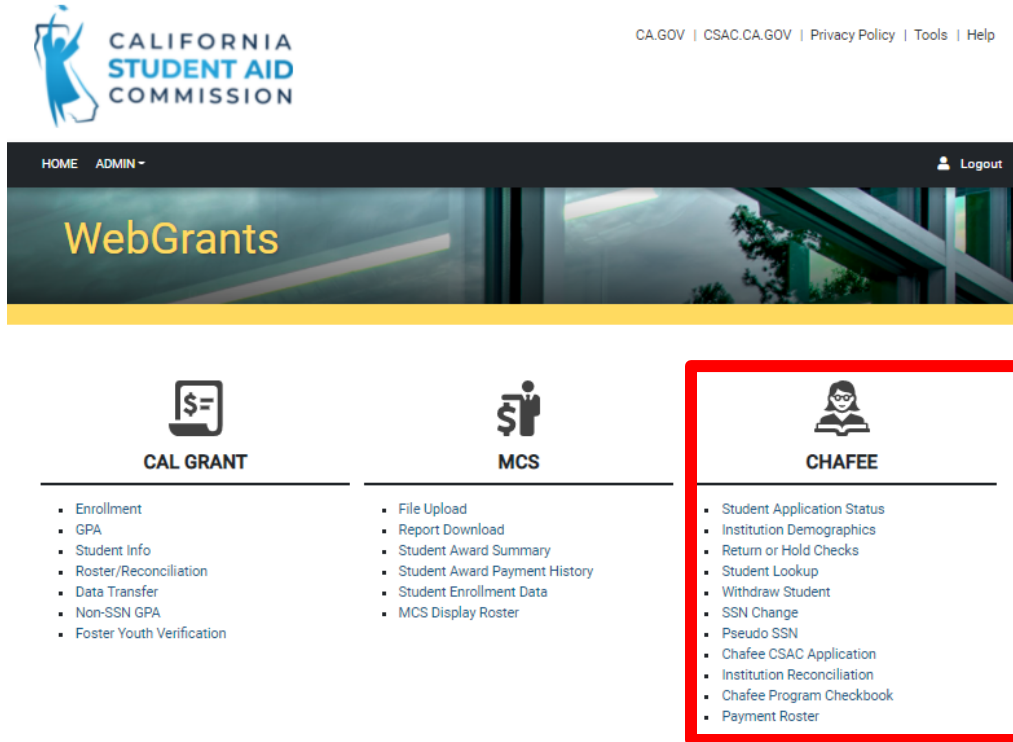
To maximize funding, you must certify both **eligible** and **ineligible** students.

You must certify eligibility and request payments (if eligible) each term. A good habit is to review your payment roster on a weekly basis, after Monday night.

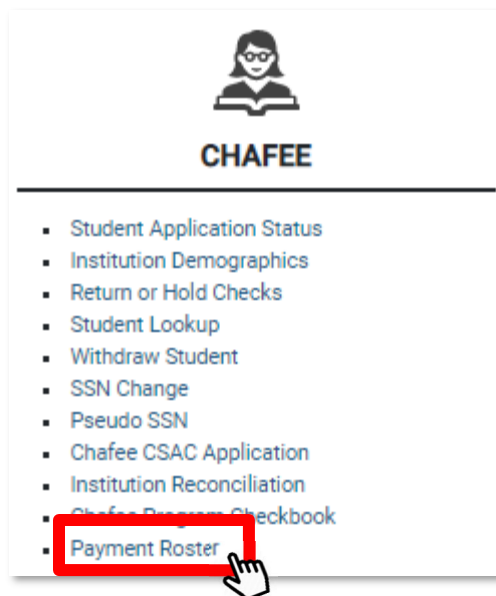
Any award that is not certified after 30 days of the offer date will be recycled to the next student on our waiting list. **See page 3 for additional details and learn how to put a student back into consideration for another award.**

# View Your Payment Roster

- 1) After logging into your WebGrants for Administrators account, look for “Chafee Grant” on the right of the screen.



- 2) Then select “Payment Roster” under Chafee Grant Menu.



3) Your payment roster will show a list of all Chafee participating students with one of five award statuses:

- **Awarded:** Student has a preliminary award and you can certify eligibility and request payment.
- **Not Awarded:** Student is marked as ineligible by the school and will not be considered for an award. **To reverse this action:** If a student regains eligibility, remove the checkmark on the ineligible reason located on the Chafee -Payment Request screen. Then click SAVE. Once the student is re-awarded, a payment can be requested in the “Request Payment” field.
- **Pending:** There is a recent pending transaction that will process on Monday evening. **See page 6 for additional details.**
- **Eligible, Not Awarded:** Student is eligible but not awarded. The student has lower priority on the awarding hierarchy and will be Awarded as funds get recycled. **See page 2 for additional details.**
- **Paid in Full:** Student has been paid for all eligible terms for the current academic year.

Payment Roster - Search Result for GROSSMONT COLLEGE (00120800) ▼

Text Format ▼ Download Roster

View	Dream Act ID / SSN	CSAC ID	Last Name	First Name	Award Status	Award Status Date
	[REDACTED]	[REDACTED]	LOPEZ	TOMAS	Awarded	08/23/2021
	[REDACTED]	[REDACTED]	SLATER	RAVEN	Awarded	08/23/2021
	[REDACTED]	[REDACTED]	HUTCHINSON	AUBREY	Awarded	08/30/2021
	[REDACTED]	[REDACTED]	REYNOSA	ANGELINA	Eligible - Not Awarded	

4) You can filter the list of students using the “Award Status” filter

Filter  
Awarded

5) Or, you can click on the column “Award Status.”

Award Status ↑

## Certify Eligibility and/or Request Payment(s)

- 1) To access a specific student's record to certify their eligibility and/or request payment(s), click on the view icon to the left of the student's Dream Act ID/SSN.

Payment Roster - Search Result for GROSSMONT COLLEGE (00120800)

Text Format Download Roster

Filter

View	Dream Act ID / SSN	CSAC ID	Last Name	First Name	Award Status	Award Status Date
	[REDACTED]	[REDACTED]	LOPEZ	TOMAS	Awarded	08/23/2021
	[REDACTED]	[REDACTED]	SLATER	RAVEN	Awarded	08/23/2021
	[REDACTED]	[REDACTED]	HUTCHINSON	AUBREY	Awarded	08/30/2021
	[REDACTED]	[REDACTED]	REYNOSA	ANGELINA	Eligible - Not Awarded	

- 2) This will take you to the "Chafee – Payment Request" page with four sections: Demographic Information, Reminders/Resources, 20-20xx Academic Year Data, and Request Payment – Open Terms: (Term Names).

**Student Demographics**

School Name Address Email Alt. Email [REDACTED]

CSAC ID SSN Date of Birth Phone Alt. Phone [REDACTED]

**INELIGIBLE (2021 - 2022 Academic Year Data)**

**Complete if student is INELIGIBLE**

Select only if the student is ineligible for the **entire academic year**. Then click SAVE.

Not Enrolled  Not Enrolled HT  Graduated or Completed  Not Maintaining SAP

**ELIGIBLE (2021 - 2022 Academic Year Data)**

**Complete if student is ELIGIBLE**

School Program: 00-

Living Arrangement:  On Campus  Off Campus  With Relatives

Term(s) Attending:  FL  WN  SP  SU

Education Level: Freshman

Cost of Attendance: \$ 24299

Expected Family Contribution: \$ 0

Other Aid: \$  Enter Other Aid Amount.

Unmet Need: \$ 24299

Projected Award: \$ 5000

Total Award Amount: \$5,000

Paid Award Amount: \$0

Unpaid Award Amount: \$5,000

**Request Payment - Open Terms: Fall**

Pay Fall Term - (07/23/2021)

Pay Winter Term - (11/04/2021)

Pay Spring Term - (01/13/2022)

Pay Summer Term - (05/18/2022)

Save Reset

3) The 20xx-20xx Academic Year Data section has two sub-sections (A & B). Determine which sub-section applies to the student and complete.

**INELIGIBLE (2021 - 2022 Academic Year Data)**

**Complete if student is INELIGIBLE**

Select only if the student is ineligible for the **entire academic year**. Then click SAVE.

Not Enrolled  
  Not Enrolled HT  
  Graduated or Completed  
  Not Maintaining SAP

SUB-SECTION A: Work this section only if you confirmed that the student is ineligible for the **entire academic year**. Then click SAVE. Do not proceed to the second section. Click for additional information and instructions.

**ELIGIBLE (2021 - 2022 Academic Year Data)**

**Complete if student is ELIGIBLE**

School Program	00 -	Cost of Attendance *	\$ 24299
Living Arrangement	<input type="radio"/> On Campus <input checked="" type="radio"/> Off Campus <input type="radio"/> With Relatives	Expected Family Contribution *	\$ 0
Term(s) Attending	<input checked="" type="checkbox"/> FL <input type="checkbox"/> WN <input checked="" type="checkbox"/> SP <input type="checkbox"/> SU	Other Aid *	\$ <span style="color: red;">Enter Other Aid Amount.</span>
Education Level *	Freshman	Unmet Need	\$ 24299
		Projected Award	\$ 5000
		Total Award Amount	\$5,000
		Paid Award Amount	\$0
		Unpaid Award Amount	\$5,000

SUB-SECTION B: Work this section only if you confirmed one of the following:

- The student is eligible for term payment(s).
- The student is ineligible in current/previous term(s) but *may re-gain eligibility in the following term(s)*.

4) If the student is eligible for payment in any current or previous term(s), mark the appropriate box(es). Then click SAVE.

**Request Payment - Open Terms: Fall**

Pay Fall Term - (07/23/2021)  
 Pay Winter Term - (11/04/2021)  
 Pay Spring Term - (01/13/2022)  
 Pay Summer Term - (05/18/2022)

If the **check box is shaded**, you cannot request payment because one of the following reasons:

- You have indicated in "Term(s) Attending" that the student is not eligible for that term payment.
- We have not opened the term for schools to request payment. The dates in this section indicate the time in which we open each term.
- The term is not applicable to your school.

- 5) After you click SAVE, the student's Award Status will change from "Awarded" to "Pending." This is considered a "transaction." You can only complete one transaction, on a student record, per week.

As previously mentioned, our system updates every Monday night. If you complete a transaction on Thursday, the student's Award Status will change to "Pending." After the Monday night system update, it will change again to either:

- **Awarded** (the student has recently been awarded or if the student has not been paid for all eligible terms), OR
- **Not Awarded** (if you marked the student as ineligible for the entire academic year), OR
- **Paid in Full** (if the student has been paid for all eligible terms), OR
- **Eligible, Not Awarded** (if you recently removed a check mark from an ineligible reason to put the student back into re-consideration for an award)

View	Dream Act ID / SSN	CSAC ID	Last Name	First Name	Award Status	Award Status Date
			GREGORY	ANDREA	Awarded	05/31/2021

In this example, the FAO certified and requested payment.

**Transaction on Student Record**

View	Dream Act ID / SSN	CSAC ID	Last Name	First Name	Award Status	Award Status Date
			GREGORY	ANDREA	Pending	06/07/2021

**Monday Night System Update**




View	Dream Act ID / SSN	CSAC ID	Last Name	First Name	Award Status	Award Status Date
			GREGORY	ANDREA	Paid in Full	06/11/2021

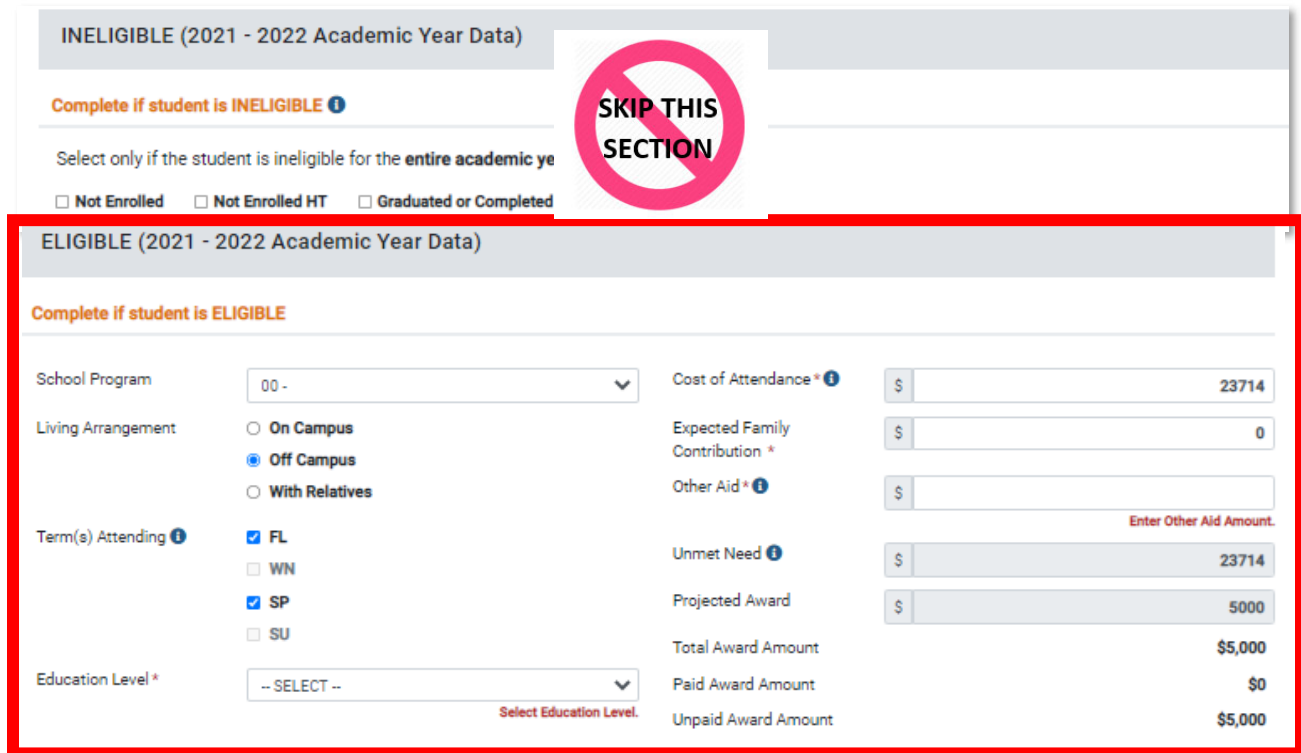
# Examples

This guide cannot provide instructions on all scenarios, but here are several examples of the most common student eligibility cases so you may get a gist of what actions you need to take on the Chafee – Payment Request page. Please contact the Chafee team if you need assistance.

**Case A:** Student is awarded in Fall 2021. He attends a 2-term school. He is currently enrolled in the Fall semester at least half-time, meets SAP, and has an unmet need. He is most likely to attend Spring semester and be eligible for payment.

Actions to take:

1. **School Programs:** Do not alter.
2. **Term(s) Attending:** Ensure FL and SP term check boxes are marked.
3. **Living Arrangements:** Select one to indicate the student’s living arrangement.
4. **Educational Level:** Select one.
5. **Cost of Attendance:** Enter amount. Click  for additional information and instructions.
6. **EFC:** Enter amount. Click  for additional information and instructions.
7. **Other Aid:** Enter amount. Click  for additional information and instructions.



The screenshot shows the Chafee Payment Request form. The top section is titled "INELIGIBLE (2021 - 2022 Academic Year Data)" and includes a "SKIP THIS SECTION" warning. The bottom section, "ELIGIBLE (2021 - 2022 Academic Year Data)", is highlighted with a red border. This section contains the following fields:

Field	Value
School Program	00 -
Living Arrangement	Off Campus
Term(s) Attending	FL, SP
Education Level	-- SELECT --
Cost of Attendance	\$ 23714
Expected Family Contribution	\$ 0
Other Aid	\$
Unmet Need	\$ 23714
Projected Award	\$ 5000
Total Award Amount	\$5,000
Paid Award Amount	\$0
Unpaid Award Amount	\$5,000

8. **Request Payment:** Check the box on the right of “Pay Fall Term – (07/23/2021).”
9. Select “SAVE”.



**Request Payment - Open Terms: Fall, Winter**

- Pay Fall Term - (07/23/2021)
- Pay Winter Term - (11/04/2021)
- Pay Spring Term - (01/13/2022)
- Pay Summer Term - (05/18/2022)

**Save** Reset

**Case B:** Student is awarded in Fall 2021. She is not enrolled at your school.

**ACTIONS TO TAKE**

1. Check the “Not Enrolled” ineligible reason box.
2. Select “SAVE”.

**INELIGIBLE (2021 - 2022 Academic Year Data)**


Complete if student is **INELIGIBLE** ⓘ

Select only if the student is ineligible for the **entire academic year**. Then click SAVE.

**Not Enrolled**    Not Enrolled HT    Graduated or Completed    Not Maintaining SAP

**ELIGIBLE (2021 - 2022 Academic Year Data)**

Complete if student is **ELIGIBLE**

School Program	<input type="text" value="00 -"/>		\$ <input type="text" value="23714"/>
Living Arrangement	<input type="radio"/> On Campus <input checked="" type="radio"/> Off Campus <input type="radio"/> With Relatives		\$ <input type="text" value="0"/>
Term(s) Attending ⓘ	<input checked="" type="checkbox"/> FL <input type="checkbox"/> WN <input checked="" type="checkbox"/> SP <input type="checkbox"/> SU		\$ <input type="text" value=""/>
Education Level *	<input type="text" value="-- SELECT --"/>		\$ <input type="text" value="23714"/>
			\$ <input type="text" value="5000"/>

Enter Other Aid Amount.

	\$5,000
	\$0
nt	\$5,000

**Case C:** Student, from Case B, officially enrolls at your school a few weeks later into the Fall semester. This is after you have marked her as ineligible (or “Not Enrolled”) for the grant. She has contacted you regarding receiving her Chafee payment. You confirm that she is eligible for Fall term payment.

**ACTIONS TO TAKE**

1. Remove the checkmark on the ineligible reason (“Not Enrolled”).
2. Click “SAVE.”
3. Re-visit the student’s record after the following Monday\* to check if the student has been re-awarded. Certify and request payment, if applicable.

\*See page 7 on why you must wait until after the following Monday.

**INELIGIBLE (2021 - 2022 Academic Year Data)**

Complete if student is **INELIGIBLE** ⓘ

Select only if the student is ineligible for the **entire academic year**. Then click SAVE.

**Not Enrolled**     Not Enrolled HT     Graduated or Completed     Not Maintaining SAP

**ELIGIBLE (2021 - 2022 Academic Year Data)**

Complete if student is **ELIGIBLE**

School Program: 00 -

Living Arrangement:  On Campus,  Off Campus,  With Relatives

Term(s) Attending ⓘ:  FL,  WN,  SP,  SU




Education Level \*: -- SELECT --

\$	23714
\$	0
\$	
Enter Other Aid Amount.	
\$	23714
\$	5000
\$5,000	
Paid Award Amount	
	\$0
Unpaid Award Amount	
	\$5,000


**Case D:** Student is awarded at the end of the academic year in May. His school has three terms. He was ineligible for Fall and Winter term payments due to not making SAP requirement. But he is eligible in the current term – Spring.

**ACTIONS TO TAKE**

1. **School Programs:** Do not alter.
2. **Term(s) Attending:** Remove checkmarks from FL and WN. Ensure SP is still checked.

3. **Living Arrangements:** Select one to indicate the student’s living arrangement.
4. **Educational Level:** Select one.
5. **Cost of Attendance:** Enter amount. Click  for additional information and instructions.
6. **EFC:** Enter amount. Click  for additional information and instructions.
7. **Other Aid:** Enter amount. Click  for additional information and instructions.  
(continue to the next page for additional instructions)

**INELIGIBLE (2021 - 2022 Academic Year Data)**





**Complete if student is INELIGIBLE** 

Select only if the student is ineligible for the **entire academic year**. Then click SAVE.

Not Enrolled  
  Not Enrolled HT  
  Graduated or Completed  
  Not Maintaining SAP

**ELIGIBLE (2021 - 2022 Academic Year Data)**

**Complete if student is ELIGIBLE**

School Program	<input type="text" value="00 -"/>	Cost of Attendance * 	\$ <input type="text" value="23714"/>
Living Arrangement	<input type="radio"/> On Campus <input checked="" type="radio"/> Off Campus <input type="radio"/> With Relatives	Expected Family Contribution *	\$ <input type="text" value="0"/>
Term(s) Attending 	<input checked="" type="checkbox"/> FL <input checked="" type="checkbox"/> WN <input checked="" type="checkbox"/> SP <input type="checkbox"/> SU	Other Aid * 	\$ <input type="text" value=""/> <small>Enter Other Aid Amount.</small>
Education Level *	<input type="text" value="-- SELECT --"/>	Unmet Need 	\$ <input type="text" value="23714"/>
	<small>Select Education Level.</small>	Projected Award	\$ <input type="text" value="5000"/>
		Total Award Amount	\$5,000
		Paid Award Amount	\$0
		Unpaid Award Amount	\$5,000

8. **Request Payment:** Check the box on the right of “Pay Spring Term – (01/13/2022).”
9. Select “SAVE”.

**Request Payment - Open Terms: Fall, Winter**

Pay Fall Term - (07/23/2021)	<input type="checkbox"/>
Pay Winter Term - (11/04/2021)	<input type="checkbox"/>
Pay Spring Term - (01/13/2022)	<input checked="" type="checkbox"/>
Pay Summer Term - (05/18/2022)	<input type="checkbox"/>

Why are these first two **check boxes shaded**? See #4 on page 6 for more details.