



Cal Grant Workshops

Fall 2005

School Support Services Branch
California Student Aid Commission
(888) 294-0153 schoolsupport@csac.ca.gov





California Student Aid Commission

- Founded in 1955
- Administering the \$1 Billion Cal Grant program
- Other State Programs:
 - APLE
 - Child Development
 - Law Enforcement Dependents Grant Program
- Federal Programs:
 - Robert C. Byrd Honors Scholarship Program
 - Chafee Grant (ETV)



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Agenda

Session 1

- What's New?
- Program Update
- Where do you find?
- Chafee Grant
- How do I...?
- What code to use?
- Compliance reminders
- Break

Session 2

- Cal Grant Application Cycle
- Award Selection
- Renewals
- Payments
- Cash Management
- Reconciliation



What's New?



Names and Numbers

- School Support Services Branch
 - (888) 294-0153 schoolsupport@csac.ca.gov
- Student Support Services Branch
 - (888) 224-7268 studentsupport@csac.ca.gov
- Specialized Programs
 - (888) 224-7268 specialized@csac.ca.gov
- Technology Help Desk
 - (888) 294-0148 csachelpdesk@csac.ca.gov



External Letter Review

- Comprehensive review of all Commission correspondence in progress
- Revised letters to be released starting 2006/07
- General simplification and shortening of letters
- Segment wide contributions



Training Initiative

- CSAC's training plan
 - 12 regions
- External Training menu
 - 2 day Beginning training
 - 1 day Advanced training
 - WebGrants
 - Payments



New GPA Form

- Available in two versions
 - Form will be available as PDF form
 - Students can complete demographic data and then printout
 - Bar code included
- Formal printed version with instructions available for ordering
 - 100 will be shipped to all schools
 - Order more as needed



WebGrants for Students

- Address Corrections
- School changes
- Payment history
- Scalability issues
- Successful Beta testing

California Student Aid Commission

WebGrants for Students

[Tools](#) [Links](#) [Help](#)

WebGrants for Students!!

Welcome! The California Student Aid Commission has created this website just for you, the student. The goal is to provide you with the tools you need to establish and manage your Cal Grant and/or Chafee Grant. If you need help with this site, please view material available in the Help Center (above right).

Please sign in

Please enter your user name, password.

Authorized Use Only

User Name	<input type="text"/>
Password	<input type="password"/>
<input type="button" value="Sign-in"/>	
Forgot Your UserID or Password?	
Create an Account	

- ◆ **Browser Versions Supported:**
Internet Explorer 5.5 and higher
Netscape 6.2.3 and higher
- ◆ **Monitor Screen Area Setting:**
For optimal viewing, please ensure your PC's "Screen area" setting is at least 1024 by 768 pixels, by selecting "Settings" from the "Start" menu on your PC, and choosing "Control Panel," "Display," and finally "Settings."
- ◆ **Apple/Mac Computers:**
Results may be unpredictable

UNAUTHORIZED ACCESS TO THIS STATE OF CALIFORNIA COMPUTER SYSTEM AND SOFTWARE IS PROHIBITED BY CALIFORNIA PENAL CODE 502 AND PUBLIC LAW 99-474, TITLE 18, UNITED STATES CODE.

This system is to be accessed by authorized users only. If you, or any individual, use this computer system without authority or in excess of your authority, you are subject to disciplinary action. System personnel routinely monitor our computer system and account activities for improper uses. Anyone using this system expressly consents to such monitoring. If it reveals possible criminal activity, system personnel may provide the evidence from such monitoring to law enforcement officials.





WebGrants for Students

- They see what you see
- No access during system downtimes
- X Ramp Technologies
- Maximum encryption available up to 256-bit with AES-256 capable software, such as Mozilla Firefox, and are 100% backward compatible for web servers or web browsers that are only capable of 128-bit or 40-bit encryption.





Cash for College

- Statewide effort
- Free, professional FAFSA completion assistance
- January and February
- www.californiacashforcollege.org
- Despina Costopoulos
 - (916) 526-6410



IVR

- Interactive Voice Response system
- To handle student and parent Cal Grant inquiries
- Chafee Grant status too!
- November 8 target date
- Access using student toll free number
- Available 24 - 7



CSAC future projects

- Real Time Database
- Service Oriented Architecture
 - Provide more flexible services
 - Automate information exchange
 - Enhance security
 - Maintain Current Functionality



PROGRAM UPDATE



2005-2006 State Budget Impact

- Cal Grants
 - Entitlements - intact
 - Competitive awards - 22,500 (no change)
 - Private school award remained at \$8,322



Cal Grant Awards 2005-06

	E1		E2		C1		C2		Cal C	Total	%
	A	B	A	B	A	B	A	B	C		
CC	2837	22043	-	-	181	5457	458	11791	5178	47945	46.2%
UC	5234	7558	983	1192	30	531	-	-	8	15536	15.0%
CSU	5118	13263	1384	1938	74	1650	-	-	0	23427	22.6%
Priv 2 yr	119	288	-	-	102	274	-	-	495	1278	1.2%
Priv 4 yr	4614	985	545	440	131	575	-	-	51	7341	7.1%
Voc	893	2197	92	59	636	1895	-	-	2539	8311	8.0%
Hosp Sch.	1	1	-	-	2	2	-	-	13	19	.02%
Totals	18816	46335	3004	3629	1156	10384	458	11791	8284	103857	100.0



2005-2006 Cal Grant Award Amounts

	A	B*	C**
Community College:	Reserve	\$1,551	\$576
California State University:	\$2,520	\$2,520 + \$1,551	NA
TCP:	\$2,922	\$2,922 + \$1,551	
University of California:	\$6,141	\$6,141 + \$1,551	\$2,592 + \$576
TCP:	\$6,897	\$6,897 + \$1,551	
Independent:	\$8,322	\$8,322 + \$1,551	\$2,592 + \$576
TCP:	\$8,322	\$8,322 + \$1,551	

* In general, first time freshmen recipients will not receive the tuition & fee award component

** For vocational programs only.



2005-06 Income Ceilings

Dependent students and Independent students with dependents other than a spouse. Based on family size.

<u>Family Size</u>	<u>CG A & C</u>	<u>CG B</u>
Six or more	\$80,400	\$44,200
Five	\$74,500	\$40,900
Four	\$69,600	\$36,600
Three	\$64,000	\$32,900
Two	\$62,500	\$29,200

Compared against parents (for dependent) or students (for independent) taxable and non-taxable income off of FAFSA



2005-06 Income Ceilings

Income ceilings for independent students without dependents other than a spouse:

	<u>CG A & C</u>	<u>CG B</u>
Single, no dependents	\$25,500	\$25,500
Married	\$29,200	\$29,200

Cal Grant Programs Asset Ceilings:

Dependent	\$53,800	\$ 53,800
Independent	\$25,600	\$25,600

Assets are compared at 100% as listed for cash, savings, investments but business and farm assets are compared at about 40% of listed. See Tables A4 and B3



2005-06 Residency Requirements

- Students over 18
 - Legal California resident for one year immediately prior to the application cycle deadline
- Students under 18
 - Living with custodial parent
 - Two years residing with custodial non-parent
- Same requirements apply for parents and students in the armed forces



Military Deferment

- Eligibility for up to 3 years for students in:
 - Active military duty
 - Peace Corps
 - VISTA
- Students should submit form G-12



**Where do you
find...?**

<http://www.csac.ca.gov/doc.asp?id=981>



[Home](#)
[Newsroom](#)
[Students and Parents](#)
[Calendar of Meetings](#)
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[Colleges](#)

[Cal Grant Manual](#)

Schools

Cal Grant Manual

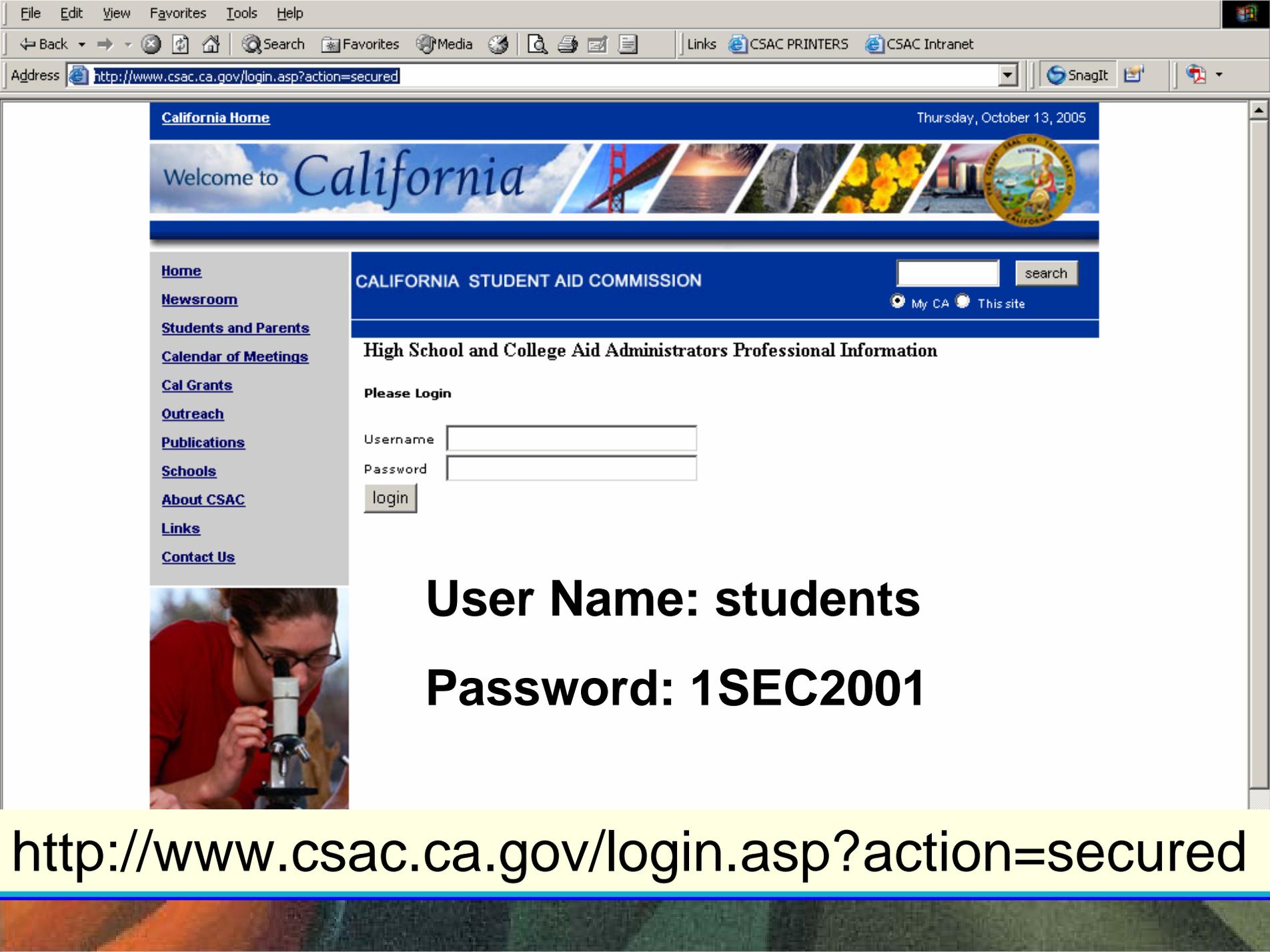
Revised Chapters

The Cal Grant Programs manual is being revised. The chapters below have been finalized unless they are marked "draft" next to the description.

Remaining chapters will be posted as soon as they are completed. If you have comments or questions regarding these documents, please forward them to [OTD Training](#)

- [Table of Contents](#) -
- [Chapter 1](#) - About the Student Aid Commission
- [Chapter 2](#) - Institutional Eligibility
- [Chapter 3](#) - Program Descriptions and Eligibility
- [Chapter 4](#) - The Cal Grant Application Process
- [Chapter 5](#) - Cal Grant Award Selection Process **(draft)**
- [Chapter 6](#) - Renewal of Cal Grant Awards
- [Chapter 9](#) - Cash Management and Disbursement
- [Chapter 10](#) - The Cal Grant Reconciliation Process
- [Chapter 11](#) - Compliance Review
- [Chapter 12](#) - Commission Communications





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CALIFORNIA STUDENT AID COMMISSION

My CA This site

High School and College Aid Administrators Professional Information

Please Login

Username
Password

User Name: students
Password: 1SEC2001



<http://www.csac.ca.gov/login.asp?action=secured>



- [Home](#)
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CALIFORNIA STUDENT AID COMMISSION

- My CA
- This site

CSAC_LIST SUBSCRIPTION FORM for PROFESSIONAL INFORMATION

Your e-mail address (required)

- | | |
|---|---|
| <input type="checkbox"/> College Financial Aid Administrators (CAA) - Professionals (Operations Memos, Alerts and Policy Bulletins) | <input type="checkbox"/> WebGrants Updates - College (Announcements, System Status Updates) |
| <input type="checkbox"/> High School Professionals (HSP) - (GPA Verification Forms and Guidelines) | <input type="checkbox"/> WebGrants Updates - High School (Announcements, System Status Updates) |

[Publications](#)



Operation Memos

[2005](#)

[2004](#)

[2003](#)

[2002](#)

[2001](#)

[2000](#)

Policy Bulletins

[2004](#)

[2003](#)

[2002](#)

Operation Memos - 2005

Date	Document Reference #	Document Title
10/11	GOM 2005-15	California Chafee Foster Youth Grant Program 2005-2006 (93kb) 2005-2006 Student Chafee Applications (42kb) Frequently Asked Questions (43kb) Chafee Brochure (80kb) Financial Need Analysis Report (127kb) Chafee Change Form (23kb) Renewal Award Announcement (41kb) Follow-Up Letter to Renewal Students Regarding Filing the FAFSA (40kb) New Student Award Letter (44kb) August 26, 2005 Chafee Stakeholder Meeting Minutes (25kb) September 13, 2005 Chafee Outreach and Retention Strategies Meeting Minutes (28kb) September 23, 2005 Chafee Stakeholder Follow-Up Meeting Minutes (26kb) Chafee Update Memorandum (47kb)
10/07	GOM 2005-14	2006 Cal Grant Outreach Summits (63kb) 2006 Cal Grant Outreach Summit Invitation (46kb) 2006 Cal Grant Outreach Summit Agenda (38kb) 2006 Cal Grant Outreach Summit Registration Form (74kb) 2006 Cal Grant Outreach Summit Hotel Information (29kb)
9/06	GOM 2005-13	WebGrants Data Transfer File Upload Enhancements (68kb)
9/02	GOM 2005-12	California Chafee Foster Youth Grant Program Update (62kb) Chafee 2005-06 Student Status Update Letter (71kb) Chafee 2005-06 Student Award Update Letter (83kb)
9/02	GOM 2005-11	California Chafee Foster Youth Grant Program 2005-06 Meeting Announcements (67kb) Chafee Stakeholders Meeting Minutes (126kb)
9/02	GOM 2005-10	WebGrants for Students (77kb)



Conference Training Sessions

- CCCSFAAA Sessions
 - Cal Grant Update
 - CSAC Technology Update
 - What's a Chafee Grant?

- CASFAA Sessions
 - WebGrants (two sessions)
 - Chafee Grant
 - State Issues



Chafee Grant



Chafee

- Stakeholders Meetings
 - Financial aid Representatives
 - Department of Social Services
 - Independent Living Program
 - California Youth Connection
 - State Assembly and Senate
- Maximum award amounts is still \$5,000
- Undocumented students can participate!



Welcome! SA0BKD To the WebGrants System

Please contact your School's System Administrator if you need access to additional screens.

Options

- ▶ [Enrollment](#)
- ▶ [GPA](#)
- ▶ [Student Info](#)
- ▶ [School Info](#)
- ▶ [Roster/Reconciliation](#)
- ▶ [Data Transfer](#)
- ▶ [Chafee Grant](#)



Account Information

- ▶ [View Your Account Details](#)
- ▶ [Help With Your Account](#)





California Chafee Grant

- Foster Youth who:
 - Are a minimum age of 16 and who for the 2005/06 year have not reached their 22nd birthday by July 1, 2005
 - Eligible for California Independent Living Program Services between their 16th and 18th birthdays
- Offers education training vouchers of up to \$5000 per academic year



Basic Chafee Eligibility

- Title IV Eligible School
 - Participates in Federal Pell Grant Program
- Minimum half-time enrollment
- Maintain Satisfactory Academic Progress
- Must have financial need
- Program length of at least one year



Chafee Application Process

1. Student will appear on CDSS list or obtain ILP certification
2. Student will file a FAFSA
3. Student must complete the Chafee application form
 - Complete on-line at www.chafee.csac.ca.gov
 - Submit printed form

Welcome to the California Chafee Grant Program!

It's easy to apply!

The California Student Aid Commission (Commission) and Department of Social Services are pleased to announce that funding will continue for the California Chafee Grant Program for the 2005-06 academic year.

NOTE: Renewal students (students who applied for the Chafee Grant for 2003-04 or 2004-05) do not need to submit another Chafee application. If you've moved, changed your name, or transferred schools, please contact the Commission to update these changes at (888)224-7268 or download the Renewal Change Form and send/fax it to the Commission.

Just a reminder - be sure to complete a 2005-06 Free Application for Federal Student Aid (FAFSA) as soon as possible either by paper form or online at www.fafsa.ed.gov. Students without a Social Security number, or who are unable to complete a FAFSA, may contact the Commission for further instructions and assistance.



➤ [California Chafee Grant Program Online Application](#)

NOTE: Must be enrolled in an accredited college to apply.

➤ [California Chafee Grant Program Application Academic Year 2005-2006](#)

➤ [California Chafee Grant Program Application Academic Year 2005-2006 \(black and white version\)](#)

➤ [Renewal Change Form](#)

➤ [California Chafee Grant Program Frequently Asked Questions Academic Year 2005-2006](#)

➤ [2005-06 Chafee ILP Certification Form](#)



Student Application

- ◆ The following information is needed so that your application may be considered for the foster youth California Grant Program.
- ◆ The California Chafee Grant Program gives free money to current or former foster youth to use for vocational school training or college courses.

SSN:

Last Name: First Name: MI:

Address: Home Phone: () -

City: Work Phone: () -

State: Zip: - E-Mail:

Replace any prior address? Yes No Date of Birth: (MM/DD/YYYY)

Foster Care County:

School of Attendance:

If you can not find your school in the drop down list above, enter the name, city and state in the boxes below.

School Name: City: State:

Degree Goal: First Bachelor's Degree

Major: Educational Level: Freshman

Are you eligible to receive an emancipated foster youth stipend or independent living program(ILP) funds? Yes No

Have you completed a Free Application for Federal Student Aid (FAFSA)? Yes No



Report Download for SACRAMENTO CITY COLLEGE

- To download or display a report or data file click on the Retrieve File button.
- All data columns can be sorted either ascending or descending order by clicking on the blue column headings.

Acad Year = Month =
 Report = Media Type = **GO!**

Report Date	Description	Media Type	Month	
14-OCT-05	Chafee Need Analysis Report	Report	OCT	<input type="button" value="Retrieve File"/>





How Do I...?



How do I determine who is new on a roster as compared to an older roster?

- Two ways:
 1. Use WebGrants “Compare Rosters” feature
 2. Mark students with custom code



Welcome! SA0BKD To the WebGrants System

Please contact your School's System Administrator if you need access to additional screens.



Options	Account Information
<ul style="list-style-type: none"> ▶ Enrollment ▶ GPA ▶ Student Info ▶ School Info ▶ Roster/Reconciliation ▶ Data Transfer ▶ Chafee Grant 	<ul style="list-style-type: none"> ▶ View Your Account Details ▶ Help With Your Account



Data Transfer

- ▶ [File Upload](#)
- ▶ [Report Download](#)
- ▶ [SSN/ID Main](#)



Report Download

- ♦ To download or display a report or data file click on the Retrieve File button.
- ♦ All data columns can be sorted either ascending or descending order by clicking on the blue column headings.

Acad Year = 2005-2006 Month = All
Report = All Media Type = All **GO!**



Report Download

- ◆ To download or display a report or data file click on the Retrieve File button.
- ◆ All data columns can be sorted either ascending or descending order by clicking on the blue column headings.

Acad Year = 2005-2006		Month = All	
Report = All		Media Type = All	GO!
<ul style="list-style-type: none">EL Verification Accept/RejectEL Verification Upload SummaryEducation Level VerificationGPA SummaryGrant RosterGrant Roster Upload SummaryMonthly Payment ActivityOtherRegistered Domestic PartnersSchool Change UploadSchool of Origin			



[Privacy Policy](#)

[Contact Us](#)

Report Download

- ♦ To download or display a report or data file click on the Retrieve File button.
- ♦ All data columns can be sorted either ascending or descending order by clicking on the blue column headings.

Acad Year = 2005-2006 Month = All
Report = All Media Type = All **GO!**

All
Report
Data File



Report Download

- ♦ To download or display a report or data file click on the Retrieve File button.
- ♦ All data columns can be sorted either ascending or descending order by clicking on the blue column headings.

Acad Year = 2005-2006 Month = All
Report = All Media Type = All 

All
Report
Data File



Report Download for PALOMAR COLLEGE

- To download or display a report or data file click on the Retrieve File button.
- All data columns can be sorted either ascending or descending order by clicking on the blue column headings.
- To create a Roster data file that includes the indicators for students new or changed from a previous data file, select one file from each column. The most recent file should be selected in the New File column and the older file in the Old File column. Then click Compare Files to produce the new data file.
- To create a Roster data file and report that lists the students who have been transferred from your roster to another school, select one file from each column. The most recent file should be selected in the New File column and the older file in the Old File column. Then click Removed From Roster to produce the data file and report.

Acad Year = Month =
 Report = Media Type =

Report Date	Description	Media Type	Month	New File	Old File	
07-OCT-05	Grant Roster	Data File	OCT	<input checked="" type="radio"/>	<input type="radio"/>	<input type="button" value="Retrieve File"/>
30-SEP-05	Grant Roster	Data File	SEP	<input type="radio"/>	<input type="radio"/>	<input type="button" value="Retrieve File"/>
23-SEP-05	Grant Roster	Data File	SEP	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="Retrieve File"/>
16-SEP-05	Grant Roster	Data File	SEP	<input type="radio"/>	<input type="radio"/>	<input type="button" value="Retrieve File"/>
09-SEP-05	Grant Roster	Data File	SEP	<input type="radio"/>	<input type="radio"/>	<input type="button" value="Retrieve File"/>
07-FEB-05	Grant Roster	Data File	FEB	<input type="radio"/>	<input type="radio"/>	<input type="button" value="Retrieve File"/>

Comparing Files. Please wait...



- ▶ This is the result of the comparison.
- ▶ Click the link to view the file.
- ▶ Right click the link to download the file.

[Compare Link](#)





What Code to Use?



What Code do I use if...?

- What code do I use if the student does not have enough financial need (\$100) to renew their Cal Grant award?

Answer: You do not use a code, you must report the need as being less than \$100

Comment: You cannot report a leave of absence or otherwise postpone the student's eligibility if the student does not have at least \$100 in need.



What Code do I use if...?

- What code do I use if the student has other awards or scholarships that don't allow Cal Grant payment for the term?

Answer: You use the "O" codes: OF, OT and OH

Comment: Student does have enough need to continue in the program based on the appropriate need formula, just not enough for payment.



What Code do I use if...?

- What code do I use if the student had a payment reported for a term but I need to back that payment out?

Answer: You use the “NS” code.

Comment: The student did not attend for the reported term, or you simply made an error.



What Code do I use if...?

- I want to remove a non-enrolled person from the roster?
- Use the “NA” code
- This “banishes” the student record to a new section – Section 5 – of the roster
- To bring them back, use “YA”



Adjustment Reason Codes

- **HT, TT** Student is attending half-time or three-quarter time and payment is adjusted accordingly
- **AF** Student is attending full-time but is eligible for less than maximum term award
- **AH, AT** Student is attending half-time or three quarter-time and is eligible for less than HT or TT adjusted amount
- **OF, OH, OT** Student is receiving Tuition & Fee assistance from outside source
- **NP** Student is not maintaining Satisfactory Academic Progress
- **NS** School needs to adjust a previously reported payment to zero
- **LA** Student is taking a Leave of Absence



Satisfactory Academic Progress (SAP)

- Students must maintain SAP to be eligible for awards
- Schools notify CSAC when student is not making SAP
 - Payment Adjustment: \$0
 - Adjustment reason code is “NP”
- CSAC sends letter to student
- Student will continue to be listed in Eligible section of roster
- Student withdrawn if more than two consecutive semesters or three consecutive quarters reported.



Leave of Absence (LA)

- Limited to 150% Total
 - One payment period (term) of LA not counted each year
- Notification
 - Student can notify CSAC on the Grant Record Change Form for Students (G-10) or
 - School can notify CSAC on the Roster
- School must still report need for renewal students



Leave of Absence Example

	Fall	Winter	Spring
2003-2004	Paid	Paid	LA

Total Leave Counted Against Maximum 150%:

0%



Leave of Absence Example

	Fall	Winter	Spring
2003-2004	Paid	Paid	LA
2004-2005	LA	LA	Paid

Total Leave Counted Against Maximum 150%: **33.33%**



Leave of Absence Example

	Fall	Winter	Spring
2003-2004	Paid	Paid	LA
2004-2005	LA	LA	Paid
2005-2006	Paid	Paid	X

Total Leave Counted Against Maximum 150%: **33.33%**



Leave of Absence Example

	Fall	Winter	Spring
2003-2004	Paid	Paid	LA
2004-2005	LA	LA	Paid
2005-2006	Paid	Paid	X
2006-2007	LA	LA	X

Total Leave Counted Against Maximum 150%:

100%

Leave of Absence Example

	Fall	Winter	Spring
2003-2004	Paid	Paid	LA
2004-2005	LA	LA	Paid
2005-2006	Paid	Paid	X
2006-2007	LA	LA	X
2007-2008	Paid	Paid	Paid

Total Leave Counted Against Maximum 150%: **100%**

Leave of Absence Example

	Fall	Winter	Spring
2003-2004	Paid	Paid	LA
2004-2005	LA	LA	Paid
2005-2006	Paid	Paid	X
2006-2007	LA	LA	X
2007-2008	Paid	Paid	Paid
2008-2009	LA	Paid	Paid

Total Leave Counted Against Maximum 150%: **100%**

Leave of Absence Example

	Fall	Winter	Spring
2003-2004	Paid	Paid	LA
2004-2005	LA	LA	Paid
2005-2006	Paid	Paid	X
2006-2007	LA	LA	X
2007-2008	Paid	Paid	Paid
2008-2009	LA	Paid	Paid
2009-2010	Paid	Paid	LA

Total Leave Counted Against Maximum 150%: **100%**



Leave of Absence Example

	Fall	Spring
2003-2004	Paid	Paid
2004-2005	LA	LA
2005-2006	Paid	X
2006-2007	LA	Paid
2007-2008	Paid	Paid
2008-2009	LA	LA
2009-2010	Paid	Paid

Total Leave Counted Against Maximum 150%: **100%**



COMPLIANCE REMINDERS



Cal Grant Account Maintenance

- Non-interest bearing account OR all interest returned to the Commission
- Separate accounting ledger for Cal Grant funds

“The Institution may deposit funds from various sources including Cal Grant funds into one bank account, but must identify the Cal Grant funds by using subsidiary ledgers. All activity of Cal Grant funds must be supported by appropriate accounting records in accordance with generally accepted accounting principles and practices.”



Interest Accrual on Cal Grant Funds

- Inform your accounting office of policy
- Beware of “sweeping” funds into general ledger account
 - ANY interest accrual must be returned to CSAC
- Check for pennies in account balance



Uncashed Checks

- Does your campus verify that any checks issued to students for Cal Grant amounts are actually cashed?
- If not cashed, dollar amount should be reduced on WebGrants or payment backed out



Questions?



Take a Break



Cal Grant Application Cycle



The Application

- FAFSA
 - Establishes financial need
 - Sent to CPS
- GPA Verification
 - Confirms academic merit
 - Sent to CSAC
- *Cal Grant C Supplemental Application*



Application Deadlines

- March 2
 - If deadline falls on holiday or Sunday, next working day
- September 2
 - 11,250 competitive A & B awards for community college students only



Cal Grant FAFSA Tips

- Verify the name and SSN are correct
- Complete citizenship and residency questions
- Complete the parent's educational level question
- List an eligible California school
- Use FAFSA on the Web www.fafsa.ed.gov
- Print FOTW submission confirmation page



GPA Types

- High school
- Reestablished
- College
- Test Scores (limited circumstances)



Ways to Submit GPAs

- GPA Verification form
- WebGrants
- Questions?
 - Grant Operations (888) 294-0153



2005-2006 GPAs

- GPA Forms
 - Order on-line
 - Order by Fax
 - Download GPA form and wraparound
- Operations Memo Guidance
 - March 2 Cycle
 - September 2 Cycle



Other GPA Considerations

- Timing of GPA submissions
- GPA rollover to September cycle
- Late GPA submission (case by case for schools)
- Multiple GPA submissions
 - High school GPA (if eligible) is best for student
 - CSAC will use highest GPA of same type



Award Selection



What is Entitlement?

- Recent high school graduates or equivalent (GED, CHSPE)
 - 2005-06 award year
 - graduated on or after July 1, 2003
 - 2006-07 award year
 - graduated on or after July 1, 2004
- High school GPA required
- Unlimited number of awards



Entitlement Opportunities

- As a high school senior
- Within one year of after graduation or GED
- As a Community College Transfer Student



What is Competitive?

- Any applicant not meeting the Entitlement criteria
- 22,500 awards
 - 11,250 March 2nd deadline (all segments)
 - 11,250 Sept 2nd deadline (community colleges)
- Applicants are scored
 - March 2 cutoff score for 2005-06: 155
 - September 2 cutoff score for 2005-06: 158



Step 1: Drawdown

- ISIR drawdown criteria
 - An on-time FAFSA, with California listed as state of residence or at least one California school listed
- Award cycle
 - Entitlement applicants – Most recent valid ISIR available at time of processing
 - Competitive applicants - Most recent ISIR available by final drawdown



Approximate Drawdown Dates

- Assuming an on time application
- Entitlement Applicants
 - Continuous throughout year
- Competitive Applicants
 - “Final” drawdown March 22
 - “Final” drawdown September 22



Step 2: FAFSA and GPA Match

- The Commission matches the FAFSA record with the GPA data using the Social Security number
- Applicants must provide a valid Social Security number in order for the application to be processed
- No letters are sent if an ISIR record cannot be matched to a GPA



Step 3: General Eligibility

- Confirm student meets general and academic requirements
- Confirm the student or parents meet the financial requirements



Step 4: Entitlement Awards

- Entitlement eligible applicants are assigned the most beneficial award type based on the first California school listed on the FAFSA
 - A or B Entitlement
 - A or B Transfer Entitlement



Step 5: Competitive Scoring

- About three weeks after the filing deadline, Competitive award candidates are scored
- Applicants who did not receive a Cal Grant A or B and who are eligible for Cal Grant C are sent supplemental applications



A & B Competitive Scoring

● Grade Point Average	70
● Parents' Educational Level	18
● Student/Parent Household marital status	18
● Family Income/Household size	76
● Access Equalizer	18
● TOTAL POSSIBLE POINTS	<hr/> 200



Cal Grant C Competitive Scoring

• Work History	25
• Educational History	25
• Occupational/Educational Recommendation	35
• Grade Point Average	15
• TOTAL POSSIBLE POINTS	<hr/> 100



Step 6: Student Notification

- Recipient
 - California Aid Report (CAR)
 - Notification of eligibility for Cal Grant
 - Displays award status and reason codes at the first 3 eligible California schools on the FAFSA
 - Mailed with the CAR are:
 - New Recipient Manual
 - New Recipient Change Form for Students



Step 6: Notification (cont.)

- No notification will be sent if
 - The application was sent after the filing deadline.
 - There is no SSN match between FAFSA & GPA
 - No GPA verification is received



Step 6: Notification (cont.)

- Non-Recipient
 - Letter stating reasons for not getting an award
 - A Cal Grant Non-Recipient Fact Sheet
 - Cal Grant Correction Form
 - Those eligible for entitlements may make changes
 - Should submit corrections within 30 days of receipt of notification.



Corrections for Unawarded Students

- Competitive applicants
 - No corrections period!
- Entitlement applicants
 - Can correct any FAFSA entry
 - No EFC
 - Application “on hold”
 - Financially Ineligible



Corrections for Awarded Students

- Some correction examples:
 - Income and asset verification reveals student is not eligible for Cal Grant
 - Financial need changes
 - High school graduation date not in Entitlement range
 - Other basic eligibility requirements
- Use On-line Grant Record Change in WebGrants
 - Form (G-21) also available



Renewals



Renewal Requirements

- Renewal students must complete the FAFSA
- Renewal students are not required to submit GPA verification thus no GPA cutoff,
- Renewal students are not required to meet the income and asset ceiling requirements, *however*
- Renewal students must have at least \$100 of financial need to remain eligible for the Cal Grant and meet the school satisfactory academic progress standards.



Students Are Renewed if...

- They have at least 10% remaining eligibility, and
- They have Cal Grant transactions posted for the minimum number of terms required:
 - At least one semester
 - At least two quarters
 - Summer is never counted
- One unreported term per year is acceptable for renewal



Renewal Notification

- Renewal packet sent to student
 - Renewal FAFSA reminder
 - Renewal Cal Grant Reference Manual
 - Recipient Change Form
- Renewal students appear on school's July grant roster



Renewed with Automatic Leave

- Renewed with Automatic Leave
 - Missing posted transaction for 1 term of prior year
 - Students renewed
- Unable to Determine Renewal Eligibility
 - Missing posted transaction for 2 or more terms of prior year
 - Students ***NOT*** renewed



Unable to Determine Renewal

- Letter sent to student
 - Advises student to contact school
- Report sent to school
 - More than one missing non-summer term
 - Sent to schools from July through November



Renewal Need Formula

$$\begin{array}{r} \text{Cost of Attendance} \\ - \text{Expected Family Contribution} \\ \quad - \text{Pell Grant} \\ \hline \end{array}$$

Cal Grant Need

Amount to compare to the minimum \$100 of need required to remain in the Cal Grant program.



Reporting Renewal Need

- Step One
 - Calculate the need using the Commission's formula
- Step Two
 - Determine if the student has enough financial need to remain in the program (at least \$100)
- Step Three
 - Report the need amount in the Unmet Need field of the WebGrants Roster



Satisfactory Progress

- Schools must confirm students are making satisfactory academic progress before disbursing funds
- Schools must notify the Commission of those students who are not making satisfactory progress



Transfers to Another School

- Student enters school change on WebGrants for Students
- Student completes Grant Record Change Form for Students (G-10)
- School keys a “school change” on WebGrants
- The Commission places student on new school’s roster
 - New school would confirm student’s financial need and report it to the Commission



Community College Reserve

- Check with the financial aid office
- Complete and submit the Recipient Change Form to reflect change of schools
- Will be processed like a renewal



Payments



Cal Grant New Recipient Need Formula

New
Cal Grant
Recipients

$$\begin{array}{r} \text{Cost of Attendance} \\ - \text{Expected Family Contribution} \\ - \text{Veteran's Benefits} \\ \hline \text{New Cal Grant Need} \end{array}$$

Schools do not determine initial need for new Cal Grant recipients. CSAC calculates the need.



Minimum Need Requirements

- New Cal Grant A & C
 - Annual Max Award + \$1,500 or
 - Actual Tuition/Fees + \$1,500, whichever is LESS.
- New Cal Grant B
 - \$700
- Renewal Recipients
 - \$100



More About Need

- To determine if the student has enough need to be renewed...
 - Use the renewal formula to compare the student's need to the minimum \$100 required for Cal Grant renewal.
- To determine the payment amount...
 - Remember to consider all other financial aid the student is receiving.
 - Be aware of your school's attribution policy



Award Components

- Tuition and Fees
- Access
- Books and Supplies



Award Components

- **Tuition and Fees**
 - Maximum payment for CSU & UC based on mandatory system-wide tuition and fees (Reg & Ed)
 - Independent/Proprietary set in state budget
- Tuition and Fee payments must be the lesser of:
 - Student's calculated Cal Grant need
 - Actual tuition and fee costs
 - Maximum annual award amount
- CGB T & F awards are fee specific awards. If student has fees paid by another award, they cannot be paid T & F award.



Award Components

- **Access**

- Educational expenses including tuition and fees, living expenses, transportation, supplies or books
- May be applied to student account or disbursed directly to student.
 - Notice this to students in disclosure materials
 - See IPA and GOM 2003-05



Award Components

- **Books and Supplies**
 - Special clothing, local transportation, required tools, equipment, supplies, books and other educational expenses
 - Applied to student account or disbursed directly to student



Award Components by Program

- Cal Grant A
 - Tuition and Fees
- Cal Grant B
 - Tuition and Fees
 - Access
- Cal Grant C
 - Tuition and Fees
 - Books and Supplies



2005-2006 Maximum Awards

- Cal Grant A & B
 - Tuition & Fees
 - CSU \$2,520
 - UC \$6,141
 - Independent \$8,322
- Cal Grant B
 - Access
 - \$1551
- Cal Grant C
 - Tuition and Fees
 - \$2,592
 - Books & Supplies
 - \$576



Program Eligibility Limits

- Program Type

Cal Grant A	Cal Grant B	Cal Grant C
400%*	400%*	200%

*may be extended to 500% for mandatory five-year or teacher credential programs.

- Education Level

EL1	EL2	EL3	EL4
400%	300%	200%	100%



Eligibility Reduction by Term

Full Time		Three-Quarter Time		Half Time	
Semester	Quarter	Semester	Quarter	Semester	Quarter
50%	33.33%	37.5%	25%	25%	16.67%

Examples:

3 fulltime semesters - $50\% \times 3 = 150\%$

4 half-time quarters - $16.67\% \times 4 = 66.68\%$

2 three-quarter time semesters - $37.5\% \times 2 = 75\%$



Refund Policy

- Schools are required to have a refund policy that includes the Commission's grant programs
- Policy should be the same for all students
- Policy should consider what is most beneficial to the student
- Policy must ensure that no Cal Grant tuition and fee payments in any programs exceed the actual tuition and fee charges or the Cal Grant need amount for any payment period



Cash Management



Cal Grant Funds Advance

- Initial Term
 - 95% of last year's payments for that term
- Subsequent Terms
 - 95% of last year's payments for that term MINUS remaining funds
- Twice monthly processing - additional funds will be sent if justifying payments have been made



Fund Advance Example

04/05 Fall Payments

School reconciles \$100,000
in Cal Grant payments

04/05 Spring Payments

School reconciles \$150,000
in Cal Grant payments

05/06 Fall Advance

$\$100,000 \times 95\% = \mathbf{\$95,000}$

School reconciles \$80,000
in Cal Grant payments

05/06 Spring Advance

$\$150,000 \times 95\% = \mathbf{\$142,500}$

$\$95,000 - \$80,000 = \mathbf{\$15,000}$

$\$142,500 - \$15,000 = \mathbf{\$127,500}$



Banking of Cal Grant Funds

- Institutional Participation Agreement
- Non-interest bearing account OR all interest returned to the Commission
- Separate accounting ledger for Cal Grant funds



Weekly Processing

- The Commission automatically edits, on a weekly basis, the payment transactions reported by the schools
- If a school has reported transactions during a week, the school will receive a report of all accepted and/or rejected transactions
 - PAY STAT - “AP” (Accepted Payment)
- All rejected transactions must be corrected by the school and reported to the Commission again



Reconciliation



What is Reconciliation?

*“(The Institution) agrees to reconcile Cal Grant expenditures for each award year on a student by student basis. The Institution certifies that it has **paid each student an amount that reconciles to the Commission’s records for both Cal Grant funds expended and student attendance.**”*

Institutional Participation Agreement
Article IV, D-5



5 Steps to Accurate Reconciliation

1. Account for funds received by the institution
2. Verify accuracy of payments delivered to each student
3. Ensure that payment transactions and student statuses are correctly reported to the Commission
4. Verify that actual disbursements match payments reported to the Commission
5. Ensure that remaining funds are returned to the Commission after Final Reconciliation



CSAC Tools to Assist School Reconciliation

- Accept/Reject Report
 - Weekly report
 - Divided into two sections:
 - Rejected transactions with reason code
 - Accepted transactions with transaction details
- Reconciliation Rosters



Additional Funding Processing

- Occurs twice a month during the academic year
- Compares the dollar amount of all the accepted transactions for a school to the dollar amount in the school's grant account
- Reconciled Payments
 - PAY STAT changes from "AP" to "RP"
(Reconciled Payment)
- Additional funds sent via warrant or EFT



Payment Activity Report

- Semi-Monthly report used to track balances
- Detail and summary of the institution's:
 - Term advances;
 - Accepted and reconciled payment transaction; and
 - Cal Grant fund balance.
- Divided into two sections:
 - Accounting Summary
 - Payment Transaction Summary



Year End Processing

- Final Reconciliation in December following the end of the academic year
- All payment adjustments and corrections should be done prior to September 30th
- Invoices for excess funds sent to schools - no carry over between years!



Questions?