



# Payment Reporting Codes

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## *WebGrants User Guide*

Updated: FEBRUARY, 2014

# Payment Reporting Codes

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## Purpose

In an effort to make Cal Grant Payment reporting more user friendly and more accurate, the California Student Aid Commission (Commission) has implemented some minor changes to Cal Grant Payment Reporting.

## Current Process

The current process of reporting Cal Grant payments will not change. Please refer to the [Roster/Reconciliation Screens](#) user guide located in the help menu of WebGrants for information on the process of reporting payments using the Display Roster.

## Introducing New Adjustment Reason Codes

The following codes have been added to the list of Adjustment Reason Codes:

New Code	Description	Commission Action/Result
FI	<b>File Incomplete-</b> Report this code if institution cannot disburse Cal Grant funds until student has completed the required forms or provided proper documentation (tax transcripts, proof of residency, etc.). Once file is complete, institution can update with disbursement information.	The Commission will send a notification to the student to inform him/her that a Cal Grant disbursement cannot be made until the missing paperwork is provided. If this code is still reported at the time of Final Reconciliation (December following the award year), the award will be withdrawn.
LH	<b>Less than Half-Time-</b> Report this code when the student <b>is enrolled</b> at your institution but is enrolled less than half time. Recipients enrolled in less than 6 semester units (or the equivalent) for the reported term are not eligible to receive a Cal Grant disbursement.	The Commission will send a notification to the student to inform him/her that to receive a Cal Grant disbursement for the reported term, he/she must be enrolled at least half time.  <i>Note: Recipients are only allotted 2 semesters or the equivalent of this status. If code is reported beyond 2 semesters or the equivalent, the student's Cal Grant will be withdrawn.</i>
IG	<b>Ineligible for Grant-</b> Report this code if the student is enrolled in an instructional program that does not meet the requirements for their award. <i>Cal Grant A = Degree Minimum 2 AY in length Cal Grant B = Degree/Cert Minimum 1 AY in length Cal Grant C = Vocational Degree/Cert Minimum 4 Months in length</i>	The Commission will send a notification to the student to inform him/her that the program he/she is pursuing is ineligible for the Cal Grant Program awarded.

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## Elimination of Adjustment Reason Codes

The following codes have been removed from the list of acceptable Adjustment Reason Codes and will no longer be accepted through manually reporting payment on the 'Display Roster' or by using the Grant Roster Upload process.

Adjustment Reason Codes Removed
AF, AT, AH
GR
IA, IB, IC
MV
PF, PT, PH
RF, RT, RH
ST, SH, SL

## All Acceptable Adjustment Reason Codes

Below is a complete list of all Adjustment Reason Codes, with brief definitions, that will be accepted by the WebGrants System.

Adj. Code	Description
<b>FT</b>	Report Full-Time payment (can be used like the AF code)
<b>TT</b>	Report Three-Quarter Time payment (can be used like the AT code)
<b>HT</b>	Report Half-Time payment (can be used like the AH code)
<b>SR</b>	Report last payment for Graduating Senior (Cal Grant will be withdrawn)
<b>OF</b>	Recipient is receiving Outside Funding (full-time)
<b>OH</b>	Recipient is receiving Outside Funding (half-time)
<b>OT</b>	Recipient is receiving Outside Funding (three-quarter time)
<b>LA</b>	Recipient is on a Leave of Absence from school and will be returning
<b>LH</b>	Recipient is enrolled Less than Half-Time, and is ineligible for payment this term
<b>FI</b>	Unable to report payment at this time due to incomplete student documents
<b>IG</b>	Recipient is ineligible for Cal Grant (A, B, or C) because of invalid program length (Cal Grant will be withdrawn) (IA, IB, IC codes removed)
<b>LD</b>	Recipient is ineligible for Cal Grant due to Loan Default/Grant Repayment program (Cal Grant will be withdrawn)
<b>TV</b>	Recipient is ineligible for TCP/5 <sup>th</sup> Year benefits (Cal Grant will be withdrawn)
<b>NP</b>	Recipient is not maintaining Satisfactory Academic Progress (Cal Grant withdrawn after 3 consecutive terms)
<b>NS</b>	Use to reverse previously reported Cal Grant payment

# Payment Reporting Codes

## Reporting the New Adjustment Reason Codes

The process for reporting payment has not changed. To report an adjustment reason code, please use the dropdown located in the illustration below.

Fall Term				Adj Reason Codes			Pay Status Codes		Delete Txn	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type	
Totals		\$1,473	\$491				4384			
B	ACSS	\$1,473	\$491						GRT	

  

Winter Term				Adj Reason Codes			Pay Status Codes		Delete Txn	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type	
Totals		\$1,473	\$491				4384			
B	ACSS	\$1,473	\$491						GRT	

  

Spring Term				Adj Reason Codes			Pay Status Codes		Delete Txn	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type	
Totals		\$1,473	\$491				4384			
B	ACSS	\$1,473	\$491						GRT	

Located on each student record, a link titled [Adj Reason Codes](#) serves a quick reference guide to the descriptions of each code.

The screenshot shows a student record page with a table of student information. A red box highlights the 'Adj Reason Codes' link in the 'Fall Term' section. A red arrow points from this link to a popup window titled 'Display Codes - Mozilla Firefox'. The popup window displays a list of codes and their descriptions:

CODE	DESCRIPTION
FT	ATTEND F/T PAYMNT IN
HT	ATTEND 1/2 TIME PAYM
LA	RCPNT TAKING LEAVE
LD	RCPNT IN DEFAULT ON
NP	RCPNT UNSATFC ACAD P
NS	RPTD PAY TXN, RCPNT
OF	RCVG TUIT/FEE OUTSD
OH	RCVG TUIT/FEE OUTSD
OT	RCVG TUIT/FEE OUTSD
SR	TUIT/FEE ONLY GRAD S
TT	ATTEND 3/4 TIME PAYM
TV	UNABL VERFY RQRMT CG
SP	SPECIAL PAYMENT

# Payment Reporting Codes

## Introducing New Payment Status Code

The following code has been added to the list of Payment Status Codes:

New Code	Description	Commission Action/Result
IT	<p><b>Ineligible for Transfer Entitlement Award-</b> Report this code if the recipient does NOT meet the Cal Grant Transfer Entitlement Award requirements (i.e. did not transfer to BDGI for the first time in initial award year, did not graduate from CA High School, etc.).</p> <p><b>Note:</b> The 'IT' code will only be available to Baccalaureate Degree Granting Institutions (BDGI). See illustration below.</p>	The Commission will send a notification to the student that informs him/her that he/she did not meet all the necessary requirements for the Transfer Entitlement Program. The student will also be re-considered for a Competitive Cal Grant award at a later date.

The screenshot shows a student record in the WebGrants system. The record includes fields for SSN, DOB, Grant ID, Cycle ID (E2), Housing Code (1), Dep Status (D), New/Renewal (N), EL Code (1), CSAC Budget (24244), EFC (14209), Remain Elig (400.00%), Forecast Elig (100.00%), and Roster Section (ELIGIBLE(1)). A dropdown menu for Adjustment Reason Codes is open, showing options: PD, NA, and IT. A red box highlights the 'IT' option. Another red box highlights the 'E2' Cycle ID. A red arrow points from the 'IT' option to the 'E2' Cycle ID. A text box explains: "'IT' code will only populate for Transfer Entitlement Cal Grant recipients". Another text box explains: "These students are identified by Cycle ID 'E2'".

## All Acceptable Payment Status Codes

Below is a complete list of all Adjustment Reason Codes, with brief definitions, that will be accepted by the WebGrants System.

Pay Code	Description
PD	Report maximum Term Amount only (Full-Time)
NA	Recipient is not in attendance at this institution. Recipient will be moved to 'Not in Attendance' section of the roster
YA	Use to move student from 'Not in Attendance' section back to the 'Eligible' section of the roster
SC	Report a School Change. Recipient will be added to your institution's roster.
IT	Report that the student does NOT meet the Cal Grant Transfer Entitlement program requirements. (Code will only appear on BDGI Cal Grant Rosters)