

ADVANCED CAL GRANT CASFAA 2014



*Presented by:
California Student Aid
Commission*



AGENDA

- College Cost Estimate
- WebGrants Reports
- Customizing the Cal Grant Roster
- New Payment & Adjustment Codes
- Cash Management and Disbursement
- Ways to Get Involved
- 2015 Projects



Presenter



Bryan Dickason

**Program
Administration**
*Senior Programs
Manager*

YOUR PRESENTER
bryand@csac.ca.gov

- California Student Aid Commission

COLLEGE COST ESTIMATE (CCE)

- The CCE is used to determine the financial need and award amounts for Cal Grant participants enrolling at your school.
- Each year (between Nov. and Jan.) a new CCE is to be completed/reviewed to ensure accuracy.
- CSAC populates the new CCE form with the prior year's data to ensure each institution has a CCE for the upcoming year.
- Please review the CCE yearly and make updates accordingly.

School and Term Information

School ID = Acad Year = Program/Course =

	2014-2015	2013-2014
Title IV School ID#	<input type="text" value="001328"/>	001328
Cal Grant Overlap Preference:	<input type="text" value="A"/>	A
Program/Course Length		
#of Months/Clock Hours/Credit Hours	<input type="text"/> <input type="text" value="Months"/>	
Required Attendance During Academic Year		
Number of Terms Per Year	<input type="text" value="2 Semesters"/>	2 Semesters
Term Start Dates		
Fall	<input type="text" value="08/25/2014"/>	08/27/2013
Winter	<input type="text"/>	
Spring	<input type="text" value="01/12/2015"/>	01/14/2014
Summer	<input type="text" value="05/20/2015"/>	06/24/2014

College Cost Information

Enter 9-Month Budgets for the Following Costs

Tuition

Amount

\$ 45602

\$42,162

Fees

Fee Type/Amount

\$

Fee Type/Amount

\$

Fee Type/Amount

\$

Fee Type/Amount

\$

Total
Amount

Delete Fees

\$ 696

\$656

Expense Amounts

Indicate below the cost of attendance minus tuition and fees already indicated above.

On Campus Amount

\$ 15882

\$15,058

Off Campus Amount

\$ 15882

\$15,058

With Parents Amount

\$ 5040

\$5,040

Five Year Academic Programs

	Architecture	Architecture
Other		

High School Grad. Date Verification Opt Out	<input checked="" type="radio"/> Yes <input type="radio"/> No	N
--	---	---

Cohort Default Rate (CDR) / Graduation Rate - threshold in parentheses

School Eligibility	Eligible	Eligible
Student Loan Rate	51 (40%)	51
CDR Rate	2.2 (15.5%)	2.5
Graduation Rate	90.1 (30%)	88.9

888-294-0153

CSAC Support School



WEBGRANTS REPORTS

AWARD STATUS EXTRACT PROCESS

HOW DO YOU FIND OUT IF STUDENTS HAVE A CAL GRANT?

- Output from this process can be used to create a batch school change file
- Can be run multiple times per year
- Only a 3 step process
 - Create an Upload File
 - Upload the file to WebGrants
 - Download output file

AWARD STATUS EXTRACT STEP ONE

- Creating the Award Status Upload File
 - Layout on WebGrants Help Screen
 - Header Record
 - School Code
 - School Name
 - Academic Year
 - Record Count
 - Content = SSNs
 - Save File to Your System

Help Center

General Information

- ◆ [Adjustment Reason Codes](#)
- ◆ [Accept/Reject Reason Codes](#)
- ◆ [Changing Your Password](#)
- ◆ [Help with your Account](#)

Publications

- ◆ [Operation Memos and Alerts](#)
- ◆ [Email Messages and Post Cards Sent to Students](#)
- ◆ [Production Schedule](#)

File Specifications

- ◆ [Award Status Extract](#) 
- ◆ [C2 Enrollment](#)
- ◆ [EL Verification](#)
- ◆ [High School Grad. Date Verification](#)
- ◆ [SSN GPA Record Layout](#)
- ◆ [Grant Roster](#)
- ◆ [School Change Data File Upload](#)
- ◆ [Unclaimed Awards Report](#)
- ◆ [Student Program Change Upload](#)
- ◆ [Disqualified Renewal Students](#)
- ◆ [Non-SSN GPA Record Layout](#)

AWARD STATUS EXTRACT STEP TWO

- Go to WebGrants File Upload Screen
- On the File Upload Menu in WebGrants

From the WebGrants Menu, go to the Data Transfer Menu



Welcome! SA9BKD
To the **WebGrants** Menu

The last time you logged on to this system was: 10/04/2010 12:32:22 pm
Number of failed attempts since your last login: 0

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

WebGrants Menu

[Enrollment](#)

[GPA](#)

[Student Info](#)

[School Info](#)

[Roster/Reconciliation](#)

[Data Transfer](#) ←

[Chafee Grant](#)

[Accounting](#)

Account Information

[View Your Account Details](#)

[Help With Your Account](#)



From the Data Transfer Menu, go to the File Upload Menu

California Student Aid Commission

[Portal Menu](#) [WebGrants](#) [Tools](#) [Help](#) [Sign Out](#)

WebGrants System

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

[Data Transfer](#) [File Upload](#) [Report Download](#) [SSN/ID Main](#)

Data Transfer Menu

[File Upload](#)



[Report Download](#)

[SSN/ID Main](#)

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Revision: 9 Date: 12/14/2009 11:43:03 AM



File Upload

- ◆ The dropdown box below lists the file types you can upload.
- ◆ Report Descriptions, File Headers, and Record Layouts are available in the [Help Menu](#)
- ◆ You may check any student's award status by uploading a file of SSN's. Files will be processed weekly and the results will be available on the Report Download screen the following Monday.
- ◆ Please make sure that all uploaded files are of the type "*.txt" (Instructions for converting an Excel file are available in the [Help Menu](#))
- ◆ For "Audit File and Secure Transfer" file types only, the following file types will be accepted: *.txt, *.csv, *.xml, *.xls, *.doc, *.pdf, *.zip, *.jpg and *.bmp

Type of Upload =

GO!

- APLE Applications
- Audit File
- Award Status Extract
- Chafee ILP Eligibility Verification Form
- Education Level Verification
- Grant Roster
- HS Grad Date Verification
- School Change Upload
- Secure File Transfer
- Student Program Change Upload



File Upload

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Type of Upload 

Academic Year Browse and select Files to upload

- | | | | |
|---|--|--|-------------------|
| 1 | <input type="text" value="2014 - 2015"/> | <input type="button" value="Browse..."/> | No file selected. |
| 2 | <input type="text" value="2014 - 2015"/> | <input type="button" value="Browse..."/> | No file selected. |
| 3 | <input type="text" value="2014 - 2015"/> | <input type="button" value="Browse..."/> | No file selected. |
| 4 | <input type="text" value="2014 - 2015"/> | <input type="button" value="Browse..."/> | No file selected. |

- ◆ The dropdown b
- ◆ Report Descripti
- ◆ You may check a
- ◆ available on the F
- ◆ Please make sure
- ◆ ([Menu](#))
- ◆ For "Audit File a
- ◆ *.pdf, *.zip, *.jpg

File Upload

Look in:

- My Recent Documents
- Desktop
- My Documents
- My Computer
- My Network Places

Award Staus Extract Upload.txt

File name:

Files of type:

results will be

able in the [Help](#)

l, *.xls, *.doc,

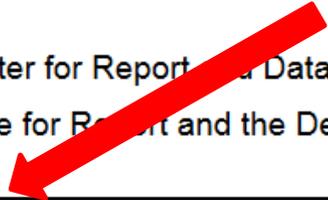
4	<input type="text" value="2010-2011"/>	<input type="button" value="Browse..."/>
<input type="button" value="Upload"/>		

AWARD STATUS EXTRACT STEP THREE

- Two files will be returned
 - Award Status Information
 - Not Awarded Information
- Use WebGrants Report Download screen

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.
- ◆ To compare two roster files, select Grant Roster for Report and Data File for Media Type.
- ◆ To delete uploaded Audit Files, select Audit File for Report and the Delete checkbox column will appear.



Acad Year = 2015-2016 Month = All

Report = All Media Type = All **GO!**

- All
- APLE Renewal Reports
- Accept/Reject
- Asset Protection Allowance Hold
- Audit File
- Automatic Leave
- Award Status Extract - Awarded
- Award Status Extract - Non Awarded
- Award Status Extract Upload Summary
- Byrd Rosters
- Cal C Supplement Recipient
- California Dream Act Correction ISIRs
- California Dream Act ISIRs (prior to Jan. 2014)
- California Dream Act Initial ISIRs
- Chafee ILP Eligibility Verification Form
- Chafee Need Analysis Report
- Chafee Status Roster By School
- DA Duplicate Account Clean-up Report
- Disqualified Renewal Students
- E2 Verification

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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.
- ◆ To compare two roster files, select Grant Roster for Report and Data File for Media Type.
- ◆ To delete uploaded Audit Files, select Audit File for Report and the Delete checkbox column will appear.

Acad Year = 2014-2015 ▾
Month = All ▾

Report = All ▾
Media Type = All ▾
GO!

All

APLE Renewal Reports
 Accept/Reject
 Asset Protection Allowance Hold
 Audit File
 Automatic Leave
 Award Status Extract - Awarded
 Award Status Extract - Non Awarded
 Award Status Extract Upload Summary
 Byrd Rosters
 Cal C Supplement Recipient
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 Chafee ILP Eligibility Verification Form
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 Chafee Status Roster By School
 DA Duplicate Account Clean-up Report
 Disqualified Renewal Students
 E2 Verification



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SCHOOL CHANGE UPLOAD

- Data from the “Award Status Extract – Awarded” **output file**, can be used to upload a School Change file
- Follow up with a school change and you can maximize the students you can serve.
- The file layout is on the WebGrants Help menu

Award Status Extract – Awarded Output

415169376BARACEA	VIOLA	K19880829RE07052137487.5	B12110T/F	10668	ACSS	1442
10772688BASANAGE	SELEEN	I19910725RE1003769730	A			
604403666RONSON	NICHELE	T19880814NE148845733200	B13840T/F	12192	ACSS	1648
629747972FONG	SHARON	19920416RE10073441450	A 6096T/F	6096		
522628202ZERAZA	JASPER	M19911417RE10157455450	A 6096T/F	6096		
615009065TORRES-GARCIA	CATANIA	J19920409RE12439722450	A 6096T/F	6096		

Detail line Layout

Field Name	Length	Mode	Position	Default/Valid Values
SSN	9	A/N	1-9	
Filler	1	A/N	10-10	Blank
Effective Term	2	A/N	11-12	FL, WN, SP, SU
Filler	1	A/N	13-13	Blank
Filler for Housing Code	1	A/N	14-14	Blank
Filler	20	A/N	25-44	Blank

EDUCATIONAL LEVEL (EL)

- **Some roster students may be selected for EL Verification**
 - View the “Education Level Verification” report to view all students who require verification
 - Without verification, the student cannot be paid
- **Other students may have incorrectly reported their EL**
- **Correcting their EL could help the student**
 - Decreasing EL gives the student more years of eligibility
 - Increasing EL could give the student access to the T/F portion of their Cal Grant B
- **EL should be in sync with loan grade level**

UNCLAIMED AWARDS REPORT

- List of unpaid eligible students who listed your school on their FAFSA/Dream app
 - Are they attending?
 - Did they never supply verification documents?
 - Are they on a leave?
 - Could they be paid?
 - Good practice – Work this report once each term after you have made all payments

CUSTOMIZING YOUR CAL GRANT ROSTER

HOW COULD CUSTOMIZING YOUR ROSTER HELP YOU?

You can use WebGrants Customize Roster to:

- show unpaid records show records missing verification of
 - High school graduation (E1)
 - E2 Eligibility Confirmation
 - EL (Grade Level) verification
- show limited eligibility for the year
 - Less than 100%
- Or, whatever you can imagine!

CUSTOMIZING YOUR CAL GRANT ROSTER

California Student Aid Commission (SAPRD)
WebGrants System

[Portal Menu](#) [WebGrants](#) [Tools](#) [Help](#) [Sign Out](#)



Welcome! SA9BKD
To the [WebGrants](#) Menu

The last time you logged on to this system was: 04/18/2011 01:38:34 pm
Number of failed attempts since your last login: 0

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

WebGrants Menu

- [Enrollment](#)
- [GPA](#)
- [Student Info](#)
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Account Information

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

Click on Roster/Reconciliation, then Customize Roster

CUSTOMIZING YOUR CAL GRANT ROSTER

California Student Aid Commission (SAPRD)

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[Roster/Reconciliation](#) [Customize Roster](#) [Display Roster](#) [Print Roster](#) [Customize Reconciliation](#) [Display Reconciliation](#) [Display Accept / Reject Report](#)

Your list of rosters will contain only the CSAC Standard Roster until you create your own rosters. The names listed below are only examples. You can name your rosters anything you wish.

Customize Roster

- The following is a list of your roster formats.
- The CSAC Standard Roster format can not be changed or deleted.
- Existing roster formats can be copied, edited and renamed.
- Any roster format can be chosen as the "Preferred Format." The Preferred Format will display automatically when "Display Roster" is selected from the Roster Main menu.

To edit or create a new customized roster, select the "Edit" icon.

Row #	Name	Preferred Format	Edit	Delete
1	CSAC Standard Roster	<input checked="" type="radio"/>		
2	Cal B	<input type="radio"/>		<input type="checkbox"/>
3	Cal C	<input type="radio"/>		<input type="checkbox"/>
4	Confirmed	<input type="radio"/>		<input type="checkbox"/>
5	Customized Roster	<input type="radio"/>		<input type="checkbox"/>
6	E1	<input type="radio"/>		<input type="checkbox"/>
7	E1 New	<input type="radio"/>		<input type="checkbox"/>
8	E2 not confirmed	<input type="radio"/>		<input type="checkbox"/>

CUSTOMIZING YOUR CAL GRANT ROSTER

California Student Aid Commission (SAPRD)

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WebGrants System

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[Roster/Reconciliation](#) [Customize Roster](#) [Display Roster](#) [Print Roster](#) [Customize Reconciliation](#) [Display Reconciliation](#) [Display Accept / Reject Report](#)

Add / Edit Your Roster Format

- Select and manage the content of your roster.
Click on **Save Roster Format** to complete the changes.

If you save a format that exceeds your maximum number of allowed formats, your customized selections will be lost.

Do NOT use special characters such as apostrophes, hyphens or slashes in the Roster Format Title. Only letters and numbers should be used.

Change the name of the Roster Format.

Set this new roster as Preferred "No"

Save Roster Format

Total custom formats defined:18

Roster Format Title	
Roster Format	Fall Unpaid
Preferred	<input type="radio"/> Yes <input checked="" type="radio"/> No

CUSTOMIZING YOUR CAL GRANT ROSTER

Scroll down to "Select Term(s)". Then press [Continue].

Add Data Element(s)

Remove Data Element(s)

- DOB
- Grant ID
- Cycle ID
- Housing Code
- Dep Status
- New / Renewal
- EL Code
- CSAC Budget
- EFC

Move Up

Move Down

Select Terms

- Select the term(s) you wish to display
- Selecting only one(1) term will allow users to sort records by term-specific data elements
- After selecting term(s), click "Continue" to choose sort options

Fall

Winter

Spring

Summer

Continue

Define Sort Order Preferences

- Click drop down boxes to choose elements for sort.

First Sort Preference

Roster Section

Ascending

Second Sort Preference

Last Name

Ascending

Third Sort Preference

First Name

Ascending

Define Selection Criteria

- ▶ Check boxes below to limit the records you wish to display.
- ▶ A checked box means that only records with those values will be included. (*If no box or every box is checked in a category, you will see all those records for your school.*)

Cycle ID	<input type="checkbox"/> E1	<input type="checkbox"/> E2	<input checked="" type="checkbox"/> C1	<input checked="" type="checkbox"/> C2	
Award Type	<input type="checkbox"/> Tuition/Fees	<input type="checkbox"/> Access	<input type="checkbox"/> Books & Supplies		
Housing Code	<input type="checkbox"/> On Campus (1)	<input type="checkbox"/> Off Campus (2)	<input type="checkbox"/> With Parents (3)		
Dependency Status	<input type="checkbox"/> Dependent	<input type="checkbox"/> Independent			
EL (Education Level)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5+
EL Status	<input type="checkbox"/> Verification Not Required (1)	<input type="checkbox"/> Not Paid, Verif Required			
	<input type="checkbox"/> Verified As Reported (3)	<input type="checkbox"/> Verified with Change (4)			
	<input type="checkbox"/> Unable to Verify (5)	<input type="checkbox"/> Paid, Verification Required (6)			
New/Renewal Students	<input checked="" type="checkbox"/> New	<input type="checkbox"/> Renewal			
Program Code	<input type="checkbox"/> A	<input checked="" type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> T	
Section	<input checked="" type="checkbox"/> Eligible	<input type="checkbox"/> CC Reserve	<input type="checkbox"/> Ineligible	<input type="checkbox"/> Not In Attendance	
Extra Eligibility	<input type="checkbox"/> TCP	<input type="checkbox"/> 5th Year	<input type="checkbox"/> Not TCP nor 5th Year		
E1 On Hold Status	<input type="checkbox"/> Verification Required	<input type="checkbox"/> Verification Completed			
	<input type="checkbox"/> Verification Not Required				
E2 On Hold Status	<input type="checkbox"/> Waiting for G6 Return	<input type="checkbox"/> Requires Verification by School			
	<input type="checkbox"/> School Verified Eligible	<input type="checkbox"/> School Verified Ineligible			
Dream App Flag	<input type="checkbox"/> Dream App Student	<input type="checkbox"/> Non Dream App Student			
Asset Hold Flag	<input type="checkbox"/> On Hold	<input type="checkbox"/> Release from Hold			
	<input type="checkbox"/> Not On Hold				
Payment Status	<input type="checkbox"/> Paid	<input checked="" type="checkbox"/> Unpaid			

Scroll down to define your Selection Criteria. This will help you filter the type of records that will be on your roster.

Customizing Your Cal Grant Roster

- ▶ Custom Codes are for school use only and are optional.
- ▶ Custom Codes must be input through the Display roster screen prior to being used in a filter.
- ▶ To begin, select either "Include" or "Exclude" from the first drop box next to the Custom Code that contains the data being filtered.
- ▶ Enter the two character code(s) you wish to include in the filter; up to three selections can be entered. If any of the values selected match, then the record will be displayed.
- ▶ When selecting more than one Custom Code field, select "And" or "Or" from the drop box at the bottom of the screen. Selecting "And" means that only records where all fields match will be displayed. Selecting "Or" means that if any of the values entered exist, the record will be displayed.

Custom Code1

 or or

Custom Code2

 or or or or or or or or

Press
[Save Roster
Format]

Save Roster Format



Now go to Display Roster, select your new format from the dropdown box under Format, and press [GO].

Online Roster

♦ Be sure to save all entries before exiting the Roster or changes will be lost.

School ID = Acad Year = 2013 - 2014 ▼ Format = CSAC Standard Roster ▼ Search = SSN ▼

- CSAC Standard Roster
- Cal A
- Cal B
- Cal C
- Dreamers
- E1
- E1 New
- E2 All
- E2 not confirmed
- Fall New
- Fall Unpaid
- Fall only
- NA
- New C2
- New Cal B Awards
- New New
- New Sept 2
- New format unpaid
- Nonconfirmed
- Unpaid for the Term



Students who have not been paid will have a "GRT" Pay Code

CSAC ID: View History Record: 1												
SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Renewal	EL Code	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
	12/05/74		C1	2	I	N	3	23142	0	200.00%	100.00%	ELIGIBLE(1)
Custom Codes		1	2	3	4	5						
Education Level (EL) Verification			Reported EL 3		Verified EL <input type="text"/>		Status 2 -- Not yet paid, Verification Required					
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	\$6,945	\$3,473			<input type="text"/>	23142					
B	T/F	\$5,472	\$2,736	<input type="text"/>	<input type="text"/>	<input type="text"/>			GRT			
B	ACSS	\$1,473	\$737	<input type="text"/>	<input type="text"/>	<input type="text"/>			GRT			

CSAC ID: View History Record: 2												
SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Renewal	EL Code	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
	08/19/83	C1	C1	2	I	N	2	23142	0	300.00%	100.00%	ELIGIBLE(1)
Custom Codes		1	2	3	4	5						
Education Level (EL) Verification			Reported EL 2		Verified EL <input type="text"/>		Status 2 -- Not yet paid, Verification Required					
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	\$6,945	\$3,473			<input type="text"/>	23142					
B	T/F	\$5,472	\$2,736	<input type="text"/>	<input type="text"/>	<input type="text"/>			GRT			
B	ACSS	\$1,473	\$737	<input type="text"/>	<input type="text"/>	<input type="text"/>			GRT			

NEW PAYMENT & ADJUSTMENT CODES

PAYMENT ADJUSTMENT CODES

FI - File Incomplete

- *Student has an incomplete file at their school and the school cannot pay student until the student completes necessary requirements (provide tax doc's, complete form, etc.)*

COMMISSION ACTION/RESULT-

The Commission will send a notification to the student that their Cal Grant Award cannot be paid until they complete their file at the school. If status is not changed before the end of the academic year's reporting period, the award will be withdrawn

NEW PAYMENT ADJUSTMENT CODES

LH – Less than Half Time

- *Student is enrolled less than half time and is not eligible to receive a Cal Grant payment*

COMMISSION ACTION/RESULT-

The Commission will send a notification to the student which states that the student must increase their enrollment if they wish to receive their Cal Grant disbursement for the reported term. If LH is reported for more than 3 semesters or 6 quarters, their award will be withdrawn. **Cannot be used in tandem with LA code – will be counted the same as LA**

PAYMENT ADJUSTMENT CODES

IT – Ineligible for Transfer Entitlement

- *Student does not meet criteria for the Transfer Entitlement Cal Grant Program.*

COMMISSION ACTION/RESULT-

The Commission will withdraw students Cal Grant award. If reported prior to C1 squared, student will then be considered for Competitive Cal Grant award.

CODES TO BE REMOVED

ALL AVAILABLE CODES

- FT- Full Time
- TT- $\frac{3}{4}$ Time
- HT- Half Time
- SR- Grad Senior
- OF- Outside Fund (FT)
- OH- Outside Fund (HT)
- OT- Outside Fund (TT)
- LA- Leave of Absence
- LH- Less than $\frac{1}{2}$ Time
- FI- File Incomplete
- IA- Inelig. Cal Grant A
- IB- Inelig. Cal Grant B
- IC- Inelig. Cal Grant C
- IT- Inelig. Transfer Ent.
- LD- In Loan Default
- TV- Inelig. TCP/5th Yr.
- NP- Not Maintaining SAP
- NS- Reverse Payment

CASH MANAGEMENT AND DISBURSEMENT

GET THAT MONEY!!!

CAL GRANT TERM ADVANCE

- CSAC will send a Cal Grant Advance payment at the start of each term.
- Currently, the Commission will be multiplying the previous year's reconciled term amount by 25 to 50 percent to determine the advance amount.
- Institutions may receive supplemental disbursements within a week of the term advance by immediately reconciling eligible payments in WebGrants.

CAL GRANT ADVANCE

- For the 2013/13 AY, a college reconciled
 - \$150,000 in Fall 2013
 - \$130,000 in Spring 2014
- In August of 2014 (start of the 2014-15 AY), CSAC sends a Fall Term Advance
 - Fall Advance in the amount of \$75,000
- In January of 2015 (start of the Spring 14/15 Sem.), CSAC sends a Spring Term Advance
 - Spring advance in the amount of \$65,000

CAL GRANT SUPPLEMENTAL PAYMENTS

- Institutions will post student payments in WebGrants, and use their Term Advance to pay students.
- Additional Funds are sent to institutions if needed on a weekly basis.
- Unused funds will be invoiced at the close of the Academic Year.
- The 2013/14 AY closes early December. Invoices will be sent in January.

WORKING THE ROSTER

- Additional funds will be sent if justifying payments are reported
 - These are a certification of eligibility
- Use school records to verify the accuracy of information reported to the Commission
- Determine eligibility and update system in a timely manner
- CSAC School help line: (888) 294-0153

WEEKLY PROCESSING

- The Commission processes school submitted payment transactions on a weekly basis.
- 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

ACCEPT/REJECT REPORT

- Weekly report of accepted and rejected processed transactions
- Use it to resolve rejected transactions
- Divided into two sections:
 - Rejected transactions with reason code
 - Accepted transactions with transaction details

WEEKLY PROCESSING

- 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 EFT

PAYMENT ACTIVITY REPORT

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



GET INVOLVED

GET THAT MONEY!!!

LIST SERVE SUBSCRIPTION

- Receive news, alerts, webinar schedules and updates
- Grant Operations Memos
- Grant Special Alerts
- List Serve message
- Stay up to date!

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College Financial Aid Administrators (CAA) - Professionals (Operations Memos, Alerts and Policy Bulletins)

WebGrants Updates - College (Announcements, System Status Updates)

High School Professionals (HSP) - (GPA Verification Forms and Guidelines)

WebGrants Updates - High School (Announcements, System Status Updates)

Information Technology Updates and Technical System Information

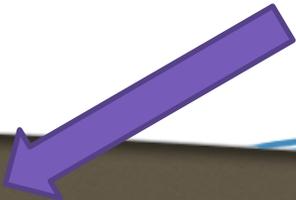


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Show past events Show only events that require registration

Date & Time	Topic	
▼ Other Events		
Nov 4, 2014 2:00 pm	Using the WebGrants System	Register
Nov 5, 2014 2:00 pm	GPA Submission Process: SSN	Register
Nov 6, 2014 2:00 pm	Cal Grant Reports and Tools	Register
Nov 7, 2014 9:00 am	PEN Committee Teleconference Meeting	Register
Nov 7, 2014 11:30 pm	SPPC Teleconference Meeting	Register
Nov 12, 2014 2:00 pm	Customizing the Cal Grant Roster	Register
Nov 13, 2014 10:00 am	GPA Submission Process: Non-SSN	Register
Nov 13, 2014 2:00 pm	GPA Reports and Matching Process for High School Cou	Register
Nov 18, 2014 2:00 pm	Cal Grant Payment Process	Register
Nov 19, 2014 2:00 pm	Cal Grant 101	Register
Nov 20, 2014 2:00 pm	CA Dream Act Overview for Financial Aid Administrators	Register

ADVISORY WORKGROUPS

- Sign up for a Commission Advisory Workgroup and provide your input!

- ❖ **Student Communications & WebGrants Messaging Workgroup:**

Contact Linda Brown LBrown@csac.ca.gov

- ❖ **Competitive Scoring and Selection Criteria Workgroup:**

Contact Kurt Zimmer KZimmer@csac.ca.gov or Cheryl Phelps CPhelps@csac.ca.gov

UPCOMING FOR 2015

- **2015-16 Dream Act Application** – releasing on January 6, 2014. Attend our Dream Act Session!
- **Middle Class Scholarship Program** – CSAC continues work with UC & CSU Staff to enhance the MCS to increase campus functionality.
- **Enrollment Files** – CSAC may request enrollment files from Cal Grant participating institutions to increase award utilization, student communication and data matching for Cal Grant consideration

RECOMMENDATIONS

- **Expansion of Cal SOAP** regions (BCP submitted to Governor)
- BCP submitted for redesign of CSAC Grant delivery system and WebGrants

THANK YOU!

California Student Aid Commission

Making education beyond high school financially accessible to all Californians.