Cal Grant Regional Training Payment Codes & Scenarios

CALIFORNIA
STUDENT AID
COMMISSION

Payment and Adjustments Codes

New Roster Look & Feel

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21

Student Data

SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Renewal	EL Code	...	...main Elig	Forecast Elig
	09/08/1996	C20426214	C1	3	I	N	4		...0%	100%

Notifications

- Student Withdrawn.

Education Level (EL) Verification

Reported EL: 4   Verified EL: [⌄]

View Stu...

Payment Adjustment Reason Codes

Code	Description
FI	FILE INCOMPLETE
FT	ATTEND F/T PAYMNT IN
HT	ATTEND 1/2 TIME PAYM
IG	INELIGIBLE FOR AWARD GRANT
LA	RCPNT TAKING LEAVE
LD	RCPNT IN DEFAULT ON
LH	LESS THAN HALF TIME
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

Payment Status Codes

Code	Description
AA	ACCEPTED ADJUSTED PAYMENT
AP	ACCEPTED PAYMENT
IT	INELIGIBLE FOR TRANSFER ENTITLEMENT
NA	NOT IN ATTENDANCE
PD	PAID PAYMENT
RA	RECONCILED ADJUSTED PAYMENT
RP	RECONCILED PAYMENT
SC	SCHOOL CHANGE
YA	IN ATTENDANCE

Status: Verification Required

Term   Adj Reason ⓘ   Pay Status ⓘ

Fall Term

Program Code	Award Type	Annual Award ($)	Term Amount ($)	Adj Amount ($)	Adj Reason	Pay Code	Annual Need ($)	Income & Asset Year Used	Rec Type
	Totals	11750	5875		[⌄]		26587		
B - SWD	T/F	5742	2871	0	[⌄]	RP			PAY
B - SWD	ACSS	6008	3004	0	[⌄]	RP			PAY

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Payment Codes

Code	Description	Resulting Action	Satisfy Renewal
PD	Reporting a full-time payment for an eligible student (Quick payment code)	Eligibility used	Y
SC	Reporting a School Change	Student will be added to your school's roster	N
NA	Reporting students that are NOT in attendance at your school (Annually)	Student will be moved to the "Not in Attendance" section after weekly process	N
YA	Reporting students that are in attendance at your school, reverses the NA	Moving a student from the "Not in Attendance" section to the "Eligible" section after weekly process	N
IT	Reporting transfer entitlement ineligibility; Only visible for BDGI schools	Award is withdrawn immediately	N

Not in Attendance (NA)

- Student is not in attendance at your school

- Moves the student to the 'Not in Attendance' section of your roster for the remainder of the school year, or until a school change is reported

- NA is an annual level code rather than a term level code

- To bring the student back to your roster, utilize 'YA' code and wait until after weekend processing to report payment

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Adjustment Reason Codes

Code	Description	Resulting Action	Satisfy Renewal
FT	Reporting a Full-time payment	Eligibility used	Y
TT	Reporting a Three-Quarter time payment	Eligibility used	Y
HT	Reporting a Half-time payment	Eligibility used	Y
LH	Reporting a Less than Half-time status, ineligible for payment this term	Uses LH eligibility; max 100% lifetime	Y
LA	Reporting a Leave of Absence, student may return	Uses leave eligibility; max 200% lifetime	Y

Leave of Absence (LA)

- Student is on an approved leave from school

- Student enrolls for subsequent terms and has no transaction reported for Fall term

- Student does not want to use Cal Grant funds

- Schools are not permitted to report LA for newly awarded Competitive students

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Adjustment Reason Codes

* Do not use IG to report financial ineligibility. Submit G-21 instead

Code	Description	Resulting Action	Satisfy Renewal
OF	Recipient is receiving Outside Funding (Full -time)	If amount = $0, no eligibility used	Y
OH	Recipient is receiving Outside Funding (Half -time)	If amount = $0, no eligibility used	Y
OT	Recipient is receiving Outside Funding (Three -Quarter time)	If amount = $0, no eligibility used	Y
FI	Unable to report payment due to incomplete financial aid file	Award is withdrawn following year end reconciliation	N
*IG	Ineligible for grant due to ineligible program length or program type	Award is withdrawn immediately	N

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- Student attends your school but is missing verification documentation

- Annual-level code versus term-level code

- FI cannot be changed to a pay code. Override with adjustment code

- FI withdraws the award at the end of year
  - ➢ FI *immediately* withdraws a new Competitive Cal Grant

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Ineligible for Grant (IG)

- Used when a student is in an ineligible program *type* or *length* for the specific Cal Grant awarded

- Program Type: Cal Grant C recipient who is enrolled in a general education or Associate's degree program vs. an occupational or technical program

- Program Length: Cal Grant A recipient who is enrolled in a certificate program of 1 academic year

- IG withdraws the award at the end of year

Graduating Senior (SR)

- Used to report final payment for a student enrolled in a Bachelor's program
  - ➢ SR available to schools that offer bachelor programs

- Allows students to be paid their full tuition charges, up to the term maximum, even if attending less than half-time

- Access is prorated as usual, based on enrollment status

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A payment was reported in error and needs to be voided. Which Payment Adjustment reason code should you use?

Answer:

Use the "NS" code with a $0 payment to back out the payment

Comment:

Situation occurs when the student did not attend for the reported term, or the payment was made in error

Term					Adj Reason ⓘ		
Fall Term							
Program Code	Award Type	Annual Award ($)	Term Amount ($)	Adj Amount ($)	Adj Reason	Pay Code	Annual Need ($)
	Totals	5742	2871		⌄	⌄	12776
A	T/F	5742	2871	0		RP	

Adj Reason dropdown options:
FI
FT
HT
IG
LA
LD
LH
NP
NS
OF
OH
OT
SR
TT
TV

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A student's final Cal Grant payment was posted (student withdrawn), but a payment adjustment is needed. What should you do?

Notifications

- Student Withdrawn.
- Student Not Eligible for Grant Award Due to application status of COMMISSION-WITHDRAWN.

Term | Adj Reason | Pay Status

Fall Term

Program Code	Award Type	Annual Award ($)	Term Amount ($)	Adj Amount ($)	Adj Reason	Pay Code	Annual Need ($)	Income & Asset Year Used	Rec Type
	Totals	7398	3699				26587	2020	
B	T/F	5742	2871	2871	SR	RA			PAY
B	ACSS	1656	828	828	SR	RA			PAY

Answer:

Contact CSAC School Support to get the award reinstated: 888-294-0153 or schoolsupport@csac.ca.gov

Comment:
Once reinstated, you can immediately go to the roster and make the necessary adjustment. However, if it is a new C1 award, you will need to wait for it to process over the weekend before you can make any changes.

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The "File Incomplete" FI transaction reported by another campus is preventing you from reporting payment for a student who is now attending your campus. How do you resolve this?

Answer: Contact the other school to remove the FI code

Comment:
If unable to resolve with the other school, contact CSAC School Support. CSAC will work with the other campus.

A student graduated before the first disbursement date. Which code should you use?

Answer:
Report "SR" and $0 payment
Adjustment Amount

Comment:
The student will receive a withdrawal notification. This code is available to four-year universities only.

| Term | | | | | Adj Reason ⓘ | | |

Fall Term

Spring Term

Program Code	Award Type	Annual Award ($)	Term Amount ($)	Adj Amount ($)	Adj Reason	Pay Code	Annual Need ($)
	Totals	7398	3699		⌄	⌄	26938
B	T/F	5742	2871	0		⌄	
B	ACSS	1656	828	0		⌄	

FI
FT
HT
IG
LA
LD
LH
NP
NS
OF
OH
OT
SR
TT
TV

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A student was originally reported as "Not in Attendance" (NA) but has since enrolled. How do we move him/her from the "Not in Attendance" section of the roster back to the active roster?

Answer:
Use the "YA" Pay code

Comment:
This moves the student record back to the "eligible", or "active" section of the roster. Payment can be reported after weekend WebGrants processing is complete

Term							Adj Reason ⓘ
Fall Term							
Program Code	Award Type	Annual Award ($)	Term Amount ($)	Adj Amount ($)	Adj Reason	Pay Code	Annual Need ($)
	Totals	7398	3699			⌄	19566
						PD	
						YA	
B	T/F	5742	2871				
B	ACSS	1656	828			⌄	

A student attending a community college, which has a standard Cal Grant amount of $1648 for the entire academic year. The student has 65% remaining eligibility at the start of the year, and is attending a semester school full time for the fall and half time for the spring terms. What can you do to pay the student the maximum amount for the year?

Answer:
Limited eligibility scenarios require special handling. Pay the fall term as usual using the FT payment code, which will use 50% of the eligibility, leaving the student with 15% remaining eligibility.

Comment:
When posting the spring term, you would select the HT payment code (to reflect accurate enrollment), but you will notice the system will populate the adjustment amount as half of the calculated term award (reducing the amount paid to 7.5% or $124, instead of the intended 15% or $247), which must be changed manually. Once this has been updated manually to $247, you may then save the roster changes, and everything should reconcile appropriately.

Payments & Census

Suggested Guidelines:

Initial Payment Made :	Payment Based on :
Before Census	Enrollment status at time of disbursement *
At Census	Enrollment status at census
After Census	• Enrollment status at census; OR • Enrollment at the time of disbursement **
After Term Completion	Enrollment status at the end of the term

* Adjustment needed at census, if enrollment status changes

** Late add to roster due to as competitive award recycling, school change initiated by the student, etc.

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At census, a student was enrolled full-time, and a FT payment was reported in WebGrants.

After census, the student's enrollment dropped to three-quarter time. Is a payment adjustment required? If so, what code should you use?

Answer:
No payment adjustment is required. The initial payment was made at census, while still enrolled full-time (FT) so the student is entitled to the FT award amount

Initial Payment Made:	Payment Based on:
Before Census	Enrollment status at time of disbursement *
At Census	Enrollment status at census
After Census	• Enrollment status at census; OR • Enrollment at the time of disbursement **
After Term Completion	Enrollment status at the end of the term

A student was enrolled full-time at the start of the term, and a full-time payment was reported. The student subsequently dropped to three quarter time *at census*. Is a payment adjustment required? If so, what code should you use?

Answer:
Yes, a payment adjustment is required to reflect the enrollment status of three-quarter time (TT) at census

Initial Payment Made:	Payment Based on:
Before Census	Enrollment status at time of disbursement *
At Census	Enrollment status at census
After Census	• Enrollment status at census; OR • Enrollment at the time of disbursement **
After Term Completion	Enrollment status at the end of the term

Fall Term

Program Code	Award Type	Annual Award ($)	Term Amount ($)	Adj Amount ($)	Adj Reason	Pay Code	Annual Need ($)
	Totals	7398	3699			⌄	26938
B	T/F	5742	2871		⌄	⌄	
B	ACSS	1656	828			⌄	

FI
FT
HT
IG
LA
LD
LH
NP
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OF
OH
OT
SR
TT
TV

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A student was enrolled full-time for the Fall term but did not appear on the roster until the Spring term. Can the student be retroactively paid for Fall term?

Answer:
Yes, the student can be retroactively paid for fall term. Cal Grants are <u>annual</u> awards, so students are paid for all terms for which they are eligible.

Payment is based on the number of units completed during the Fall term.

Initial Payment Made:	Payment Based on:
Before Census	Enrollment status at time of disbursement *
At Census	Enrollment status at census
After Census	• Enrollment status at census; OR • Enrollment at the time of disbursement **
After Term Completion	Enrollment status at the end of the term

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A student was enrolled full-time *at census*, but subsequently dropped to half-time status. He wasn't added to the roster until *after census*. What payment is the student eligible for: FT or HT?

Answer:
This student was added to the roster after census, so payment is based on enrollment status at the time of disbursement. He was enrolled half-time at the time of disbursement and is only eligible for a half-time payment (HT).

Comment:
For any extenuating circumstances *after census*, payment is based on enrollment status *at the time   of disbursement*

Initial Payment Made:	Payment Based on:
Before Census	Enrollment status at time of disbursement *
At Census	Enrollment status at census
After Census	• Enrollment status at census; OR • Enrollment at the time of disbursement **
After Term Completion	Enrollment status at the end of the term

** Situation occurs due to extenuating circumstance (late add to roster, recycled competitive award, file incomplete)
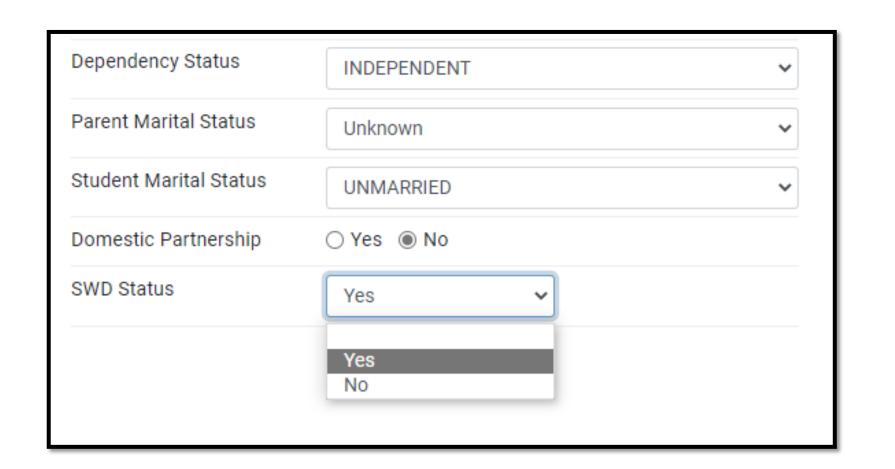
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Verification and Special Circumstances

A student was paid as a SWD student. However, they were later verified as not eligible. What should you do?

Answer:
Adjust to base award amount and submit change on the Grant Application MG 21 screen to remove the SWD flag.
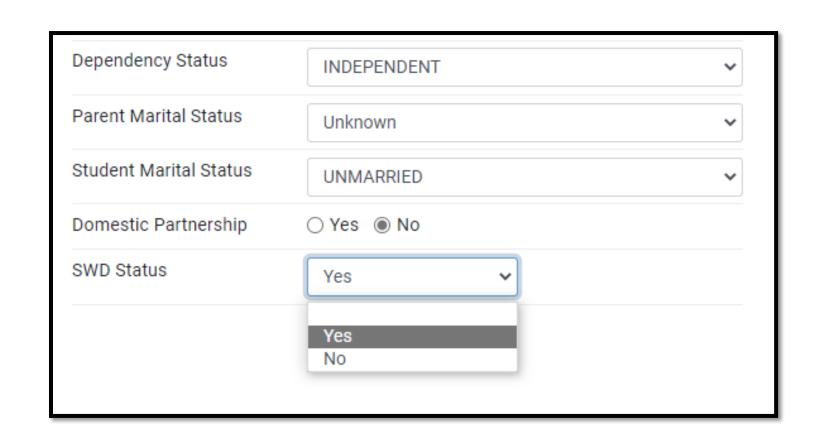
Dependency Status	INDEPENDENT
Parent Marital Status	Unknown
Student Marital Status	UNMARRIED
Domestic Partnership	○ Yes ◉ No
SWD Status	Yes
	Yes
	No

A student was paid at the base award amount but was later verified as eligible for SWD. How are you able to get them identified as SWD and paid correctly?

Answer:
Submit a Grant Application MG21 or Grant Record Change form to School Support to have the SWD flag added to the student's account.

Comment:

If the student was initially identified as eligible SWD but had the flag removed (e.g. didn't certify on time), schools can add the students back on the MG 21 screen. However, if students had mistakenly answered incorrectly financial aid application, then Submit a Grant Record Change form to School Support to have the SWD flag added to the student's account after the financial aid application has been corrected.

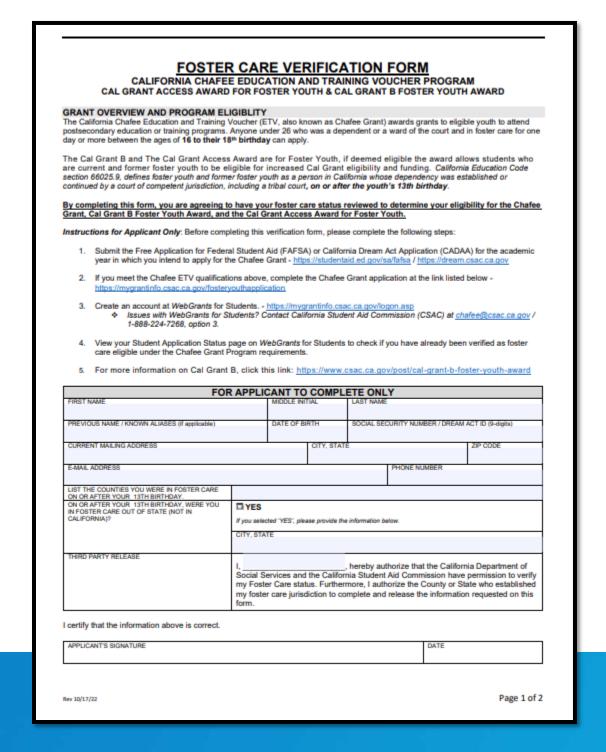| Dependency Status | INDEPENDENT |
Parent Marital Status	Unknown
Student Marital Status	UNMARRIED
Domestic Partnership	○ Yes ● No
SWD Status	Yes
	Yes
	No

A student was paid at the base award amount but was later verified as eligible for FYA. How are you able to get them identified as FYA and paid correctly?

Answer:
If the student had mistakenly answered incorrectly on their financial aid application, have them make the correction on their financial aid application. The record will need to be verified by CDSS before schools can submit a Grant Record Change form to School Support to have the SWD flag added to the student's account.
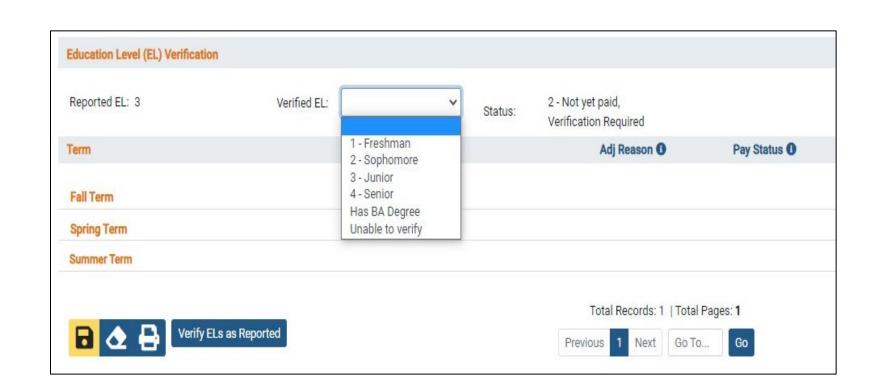

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A student was paid at the base award amount prior to EL Verification. Why is WebGrants not allowing the second semester/quarter payment to go through?

Answer:

Only a Fall payment is allowed to be posted while awaiting EL Verification. Any further payments will reject until the EL is verified.

Comment:

Once the EL has been verified on the roster, schools will have to wait for it to process over the weekend before making any other payments.

California Student Aid Commission

Your school does not have a mandatory summer term. However, a student would like to receive a Cal Grant payment for the summer school term. What are your next steps?

Answer:
If your school needs to have a summer term added to the roster, contact School Support to have it added.

Comment:
Any summer payments will use the additional eligibility over the standard amount for the AY. Also, if a student had a discretionary summer term paid in a prior year, the future years will show a summer term on the roster but they payment is not required for renewal.

Term			
Fall Term			
Program Code	Award Type	Annual Award ($)	Term Amount ($)
	Totals	12841	0
B	T/F	10918	0
B	ACSS	1923	0
Winter Term			
Program Code	Award Type	Annual Award ($)	Term Amount ($)
	Totals	12841	1835
B	T/F	10918	1560
B	ACSS	1923	275
Spring Term			
Program Code	Award Type	Annual Award ($)	Term Amount ($)
	Totals	12841	3668
B	T/F	10918	3119
B	ACSS	1923	549
Summer Term			
Program Code	Award Type	Annual Award ($)	Term Amount ($)
	Totals	12841	3670
B	T/F	10918	3120
B	ACSS	1923	550

Clock Hours

Suggested Guidelines:

	Hours	Units	% Eligibility Used Per Term: Semesters
Full Time Enrollment	360+	12+	50%
Three Quarter Time Enrollment	270-359	9-11	37.5%
Half Time Enrollment	180-269	6-8	25%

	Hours	Units	% Eligibility Used Per Term: Quarters
Full-Time Enrollment	240+	12+	33.33%
Three Quarter Time Enrollment	180-239	9-11	25%
Half Time Enrollment	120-179	6-8	16.67%

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A student completed 300 hours during the Fall Semester and 355 hours during the Spring Semester. How much eligibility did they use up for the academic year?

Answer:
87.5% for the academic year

Refer back to your school policy as well as the clock to credit hour conversion rate, which determine enrollment status.

Fall Term

Program Code	Award Type	Annual Award ($)	Term Amount ($)	Adj Amount ($)	Adj Reason	Pay Code
	Totals	6000	3000			
B - SWD	ACSS	6000	3000	2250	TT	

Spring Term

Program Code	Award Type	Annual Award ($)	Term Amount ($)	Adj Amount ($)	Adj Reason	Pay Code
	Totals	6000	3000			
B - SWD	ACSS	6000	3000	3000	FT	

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