

Application Information

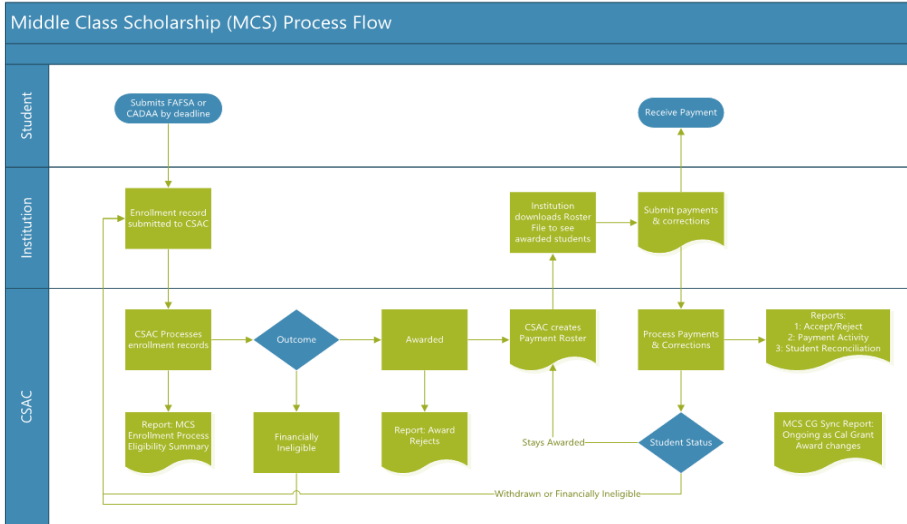
- Students must submit a FAFSA or CA Dream Act Application by the March 2nd deadline.
- An enrollment record must be submitted by the campus for *all* students who should be considered for the award.
 - If student who is initially withdrawn or financially ineligible becomes eligible, a new enrollment record must be submitted.
- Available to students attending a UC or CSU, or a California Community College in the Bachelor Degree Program (CCBA)

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Awarding Process

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Awarding Process



2020-21 Academic Year

- July 1, 2020 - June 30, 2021
- Ability to add manually or via the file upload process
- Files are processed weekly
- To reconsider a previously-awarded student for an MCS award, a new enrollment record must be submitted

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To identify potentially eligible students for MCS, email schoolsupport@csac.ca.gov. The Commission will determine preliminary eligibility. This is a manual process.

- Provide the following for all potentially-eligible students in the CCBA program:
 - FAFSA/CADAA submitted by the March 2nd deadline
 - Name
 - CSAC ID
 - Education Level
 - Upper-division fees charged
 - Income/assets
 - Other Aid (Federal, Institutional, and State Aid)

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If your student is found **eligible** for MCS:

- CSAC will provide MCS roster template
- CCC uploads roster via “Secure File Transfer” and emails CSAC with file name & school code
- CSAC determines award/payment amounts, uploads MCS roster via “Secure File Transfer”, and notifies CCC
- CCC downloads roster; processes payments

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Student Enrollment Screen

Allows users to view the student's enrollment information uploaded by the campus.

There are 3 Enrollment Statuses:

- **Blank** = Student was rejected from the Enrollment file, is not awarded, or is not on the roster
- **Pending** = Not processed through the award cycle:
 - The record does not match CSAC's data; or
 - Another campus uploaded an enrollment record for the student
- **Found in Roster** = Student is on MCS roster. Will disallow duplicate entry

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Student Enrollment Screen

CSU SACRAMENTO

SSN: [] Academic Year: 2018

First Name: [] MI: [] Last Name: []

E-Mail: [] Date of Birth: []

Education Level: 4th year/senior Dependent Status: 1 - Dependent

Student Status: 2 - Continuing Term Type: 1 - Semester

ISIR Txn Nbr: 01 Total Income: 58,711

Federal Award Amount: 0 Institution Aid Amount: 0

State Award Amount: 0 TCP or 5th Year Program: --- SELECT ---

Upload Date: 07/10/2018 Enrollment Status: Found in Roster

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Three Award Statuses:

- Awarded
- Financially Ineligible
- Withdrawn (occurs after a student is awarded and on a roster)

Student Not Found (Award Summary screen):

- Rejected Records: Review the MCS Enrollment Process Eligibility Summary Report (search under the week of submission).
- Pended Records: Student was uploaded by another campus or the student's award was rejected due to mismatched data between the enrollment record and CSAC's data.
- An enrollment record was not submitted.

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Student Award Summary Screen

Awarded:

CSAC ID: Acad Year: All

SSN:
 CSAC ID:
 DOB:
 TCP Flag: No
 5th Yr-Program: No
 Year-Entered: 2017

Total-Eligibility-%: 200.00
 Used-Eligibility-%: 99.99
 Remaining-Eligibility-%: 100.01
 Established Educational Level: 3rd year/Junior
 Current Educational Level: 3rd year/Junior

[Download .txt file](#)

Academic Year	School ID	Award Status	Reported Total Income	Reported Asset Amount	Reported Cal Grant Amount	Reported State Award	Reported Federal Grant	Reported Institutional Aid	Fall Award Amount	Winter Award Amount	Spring Award Amount	Total Award Amount
2019	00115000	AWARDED	\$101,952	\$12,000	\$0	\$0	\$0	\$0	\$1,149	\$0	\$1,149	\$2,298
2018	00115000	FINANCIALLY INELIG	\$81,683	\$0	\$5,742	\$0	\$0	\$0	\$0	\$0	\$0	\$0

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Corrections

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MCS Roster

Demographic Information		Annual Data	
CSAC ID:		Academic Year:	2017 - 2018
SSN No:		Open Terms:	Fall, Winter, Spring
DOB:		Total Income:	\$55,272
Cal Grant Award: \$0	Total Elig-%: 200.00	Federal Aid:	\$0
Annual Tuition/Fees: \$12,630	Used Elig-%: 99.99	Institutional Aid:	\$4,203
Annual Award: \$852	Remain Elig-%: 100.01	State Aid:	\$0
Asset Amount: \$0	Year Entered: 2016	ISIR Tran #:	02
TCP5th Yr-Indicator: No		Eligibility Change:	-- SELECT --
Education Level: 4th year/senior			Payment History

Transaction Type: Correction Payment

FALL TERM	WINTER TERM	SPRING TERM
Enrollment Status: -- SELECT -- <small>PT - (Pay) Less Than HT - (DO NOT PAY)/mm Award Amount Not Enrolled HT - (Pay)</small>	Enrollment Status: -- SELECT --	Enrollment Status: -- SELECT --
Term Award Amount: \$204	Term Award Amount: \$204	Term Award Amount: \$204
Adj. Reason Code: -- SELECT --	Adj. Reason Code: -- SELECT --	Adj. Reason Code: -- SELECT --
Amount Paid/Verified: <input type="text"/>	Amount Paid/Verified: <input type="text"/>	Amount Paid/Verified: <input type="text"/>
Tuition/Fees: \$4,203	Tuition/Fees: \$4,203	Tuition/Fees: \$4,203
Federal Aid: \$0	Federal Aid: \$0	Federal Aid: \$0
Institutional Aid: \$1,401	Institutional Aid: \$1,401	Institutional Aid: \$1,401
State Aid: \$0	State Aid: \$0	State Aid: \$0
Payment Status: Not Reconciled	Payment Status: Not Reconciled	Payment Status: Not Reconciled

- Payments can only be applied to *open* terms
- If Annual Data is correct, apply payment
- If Annual Data is incorrect, submit a *correction* prior to applying a payment
- CSAC staff does not have the ability to make changes to student records

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Annual Level Changes

Annual Level changes affect the student's award. Any change will recalculate the award.

- When reporting state aid at the annual or term level, institutions should EXCLUDE Cal Grant awards. CSAC will factor in Cal Grant awards during the award calculation. Review MCS-CG Sync report.
- When uploading corrections, change field 42 (Transaction Type) of the record layout from "P"- for Payment to "C"- for Correction. When making changes on the roster, select the eligibility drop down to make correction fields active.

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Term Level Changes

A **Term Level** Change is applied when just the term is being adjusted.

- A term can have the following amounts updated: **Tuition/Fees, Federal Aid, Institutional Aid and State Aid**. Any changes to the term will only recalculate the term, not the annual award.
- To reinstate a term-level award, apply a correction and re-key the Tuition/Fees + SAVE

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Term Level Correction

The Adj. Reason Code field provides two options when making changes to the term. Selecting the Correction radio button displays these options:

- **Eligibility** is used when making changes to the “other aid” amounts: Federal Aid, Institutional Aid and State Aid
- **Fees** is used when making changes to the Tuition/Fees amount

Transaction Type Correction <input type="radio"/> Payment <input type="radio"/>	
FALL TERM	SPRING TERM
Enrollment Status: <input type="text" value="--- SELECT ---"/>	Enrollment Status: <input type="text" value="--- SELECT ---"/>
Term Award Amount (\$822): <input type="text" value="\$822"/>	Term Award Amount (\$822): <input type="text" value="\$822"/>
Adj. Reason Code: <input type="text" value="--- SELECT ---"/>	Adj. Reason Code: <input type="text" value="--- SELECT ---"/>
Amount Paid/Verified: <input type="text" value="--- SELECT ---"/>	Amount Paid/Verified: <input type="text" value=""/>
Tuition/Fees (\$2,736): <input type="text" value="\$2,736"/>	Tuition/Fees (\$2,736): <input type="text" value="\$2,736"/>
Federal Aid (\$0): <input type="text" value="\$0"/>	Federal Aid (\$0): <input type="text" value="\$0"/>
Institutional Aid (\$0): <input type="text" value="\$0"/>	Institutional Aid (\$0): <input type="text" value="\$0"/>
State Aid (\$0): <input type="text" value="\$0"/>	State Aid (\$0): <input type="text" value="\$0"/>
Payment Status: Not Reconciled	Payment Status: Not Reconciled

Term Level Adjustment

The Payment radio button allows the user to apply an Adjustment Reason Code to indicate term ineligibility; or to post a Refund/Adjusted Payment to the term:

- Selecting Post Bacc, SAP or Other are *ineligible statuses*. This will zero out the term award and apply a \$0 payment.
- Refund/Adjusted Payment is used to post a payment less than the term award.

Transaction Type: Correction		Payment
FALL TERM		SPRING TERM
Enrollment Status: <input type="text" value="--- SELECT ---"/>	Enrollment Status <input type="text" value="--- SELECT ---"/>	
Term Award Amount [\$822]	Term Award Amount <input type="text" value="\$822"/>	
Adj. Reason Code <input type="text" value="--- SELECT ---"/>	Adj. Reason Code <input type="text" value="--- SELECT ---"/>	
Amount Paid/Verified	Amount Paid/Verified <input type="text"/>	
Tuition/Fees [\$2,736]	Tuition/Fees <input type="text" value="\$2,736"/>	
Federal Aid [\$0]	Federal Aid <input type="text" value="\$0"/>	
Institutional Aid [\$0]	Institutional Aid <input type="text" value="\$0"/>	
State Aid [\$0]	State Aid <input type="text" value="\$0"/>	
Payment Status: Not Reconciled	Payment Status: Not Reconciled	

Payments

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Reporting Payments

There are five payment options available to campuses:

1. FT-(Pay): Applies a payment equal to the term award amount and uses full eligibility
 - o (50%- semester)
 - o (33.33%-quarter)
2. HT-(Pay): Applies a payment equal to the term award amount and uses half-time eligibility
 - o (25%- semester)
 - o (16.67%-quarter)
3. Less Than HT – (Do Not Pay) & Not Enrolled: Applies a \$0 payment but keeps the award intact. No eligibility is used.
4. Refund/Adjusted Payment: Allows a payment less that the term amount to be applied but uses full eligibility, unless a payment of \$0 is applied.
5. Payments and corrections are processed on Tuesday nights and over the weekend. Results can be viewed on Wednesdays and Mondays.

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Payments – Enrollment Status

Transaction Type: Correction <input type="radio"/> Payment <input checked="" type="radio"/>	
FALL TERM	SPRING TERM
Enrollment Status: <input type="text" value="--- SELECT ---"/>	Enrollment Status: <input type="text" value="--- SELECT ---"/>
Term Award Amount [\$822]	Term Award Amount [\$822]
Adj. Reason Code Not Enrolled	Adj. Reason Code --- SELECT ---
Amount Paid/Verified	Amount Paid/Verified
Tuition/Fees [\$2,736]	Tuition/Fees [\$2,736]
Federal Aid [\$0]	Federal Aid [\$0]
Institutional Aid [\$0]	Institutional Aid [\$0]
State Aid [\$0]	State Aid [\$0]
Payment Status: Not Reconciled	Payment Status: Not Reconciled

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Student Payment History

This screen displays all payments and corrections applied to the student record.

CSAC ID <input type="text"/>		Acad Year 2019 - 2020		Retrieve					
Student Name: STATUS: AWARDED				SSN: CSAC ID:					
Institution Name	Acad Year	Term	Pay Amt	Pay Type	Pay Status	Adj Reason	Elig Used	Date	Created By
UNIV OF CA - DAVIS	2019	AY		C		Eligibility	0.00	09/20/2019	
UNIV OF CA - DAVIS	2019	FL	\$1,292	P	Reconciled		33.33	10/31/2019	

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What causes the recertify?

- A correction was applied at the annual level or term level to a record that has payments.
- Changes to the income, other aid and T/F causes the award to be recalculated.
- The new award overrides the current payment in place with the revised award amount.
- For more information about the recertify process, please see our new training video.

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Roster – Red Brackets

The red font in brackets displays the most current term-level information. This consists of the payment and adjustment types, Tuition/Fees, Federal Aid, Institutional Aid and State Aid.

FALL TERM	WINTER TERM	SPRING TERM
Enrollment Status: <input type="text" value="--- SELECT ---"/> [FT - (Pay)]	Enrollment Status <input type="text" value="--- SELECT ---"/>	Enrollment Status <input type="text" value="--- SELECT ---"/>
Term Award Amount <input type="text" value="\$0"/> [\$0]	Term Award Amount <input type="text" value="\$0"/> [\$0]	Term Award Amount <input type="text" value="\$547"/> [\$547]
Adj. Reason Code <input type="text" value="--- SELECT ---"/>	Adj. Reason Code <input type="text" value="--- SELECT ---"/>	Adj. Reason Code <input type="text" value="--- SELECT ---"/>
Amount Paid/Verified <input type="text" value="\$0"/> [\$0]	Amount Paid/Verified <input type="text" value="\$0"/>	Amount Paid/Verified <input type="text" value="\$0"/>
Tuition/Fees <input type="text" value="\$1,824"/> [\$1,824]	Tuition/Fees <input type="text" value="\$1,824"/> [\$1,824]	Tuition/Fees <input type="text" value="\$1,824"/> [\$1,824]
Federal Aid <input type="text" value="\$725"/> [\$725]	Federal Aid <input type="text" value="\$0"/> [\$0]	Federal Aid <input type="text" value="\$0"/> [\$0]
Institutional Aid <input type="text" value="\$811"/> [\$811]	Institutional Aid <input type="text" value="\$1,824"/> [\$1,824]	Institutional Aid <input type="text" value="\$0"/> [\$0]
State Aid <input type="text" value="\$0"/> [\$0]	State Aid <input type="text" value="\$0"/> [\$0]	State Aid <input type="text" value="\$0"/> [\$0]
Payment Status: Reconciled	Payment Status: Not Reconciled	Payment Status: Not Reconciled

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Tips and Recommendations:

- Reconcile weekly or monthly by utilizing reports (Payment Activity and Student Reconciliation)
- Review recertify payments weekly or monthly (use export function from roster screen)
- Reconciliation deadline: September of each processing year
- Refer to MCS Guide and Roster Layout for specific scenarios

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RESOURCES

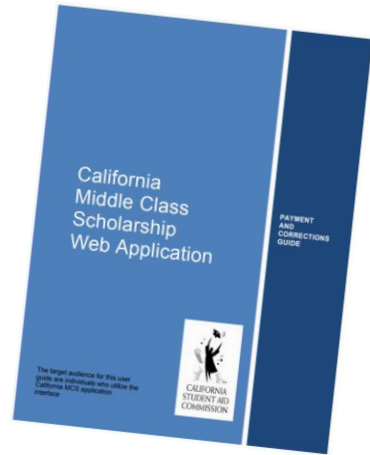
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MCS Resources

The Payment and Corrections Guide contains the following topics:

- Annual and Term-level Changes
- Payment and Correction Scenarios
- Reject Reason codes
- MCS Reports

Coming soon! A new and more comprehensive MCS User Guide will replace the Payment and Corrections Guide. To be announced via List-Serv. Stay tuned!



<https://www.csac.ca.gov/post/middle-class-scholarship-0>

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Do you want to.... Make an impact? Share your great ideas with the financial aid community? Or just stay informed?

Then join the MCS workgroup... or simply get on the distribution list to receive:

- Meeting quarterly invites – actively participate or listen only
- Meeting minutes
- Maximum Award Amounts list
- Updates about system issues

Email schoolsupport@csac.ca.gov to request to be added to the distribution list!

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MCS Reports

WebGrants: [MSC](#)>[MCS](#)- [Data Transfer](#)>[Report Download](#)

Report Type	Media Types	Description
Admission File Report	Data File	Summary information for the Admission file uploaded. Total Number of Records; Accepted & Rejected. Note: Only generates during the Admission file upload timeframe designated by CSAC.
Enrollment File Report	Data File & Report	Contains a list of students who rejected from the Enrollment File. An error code is displayed that begins with "I" for ineligible or "R" for rejected followed by a three digit code that identifies the error (I002, R020, R031). A description of the error is provided in the "Report" format. The Data File format does not provide a description, only the code(s).
Award Rejects Report	Report	Identifies students who were rejected during the award process due to mismatched data between the enrollment information submitted by the campus and CSAC's system. To correct the record, a copy of the student's SSN and CA Driver's License/ID is needed for proof. <ul style="list-style-type: none"> • If CSAC corrects it to match the information in the enrollment file, the student will get picked up in the next award cycle. • If CSAC data is correct, and the enrollment file has the wrong data, then the campus must submit a new enrollment record to match CSAC's data.
Roster File Report	Data File	A listing of the students currently on the schools roster. It holds information related to the record, payments, adjustments, current amounts in place (Award, Income, Tuition/Fee, Other Aid, Eligibility %, Educational Level, TCP/5th Year Flag).

MCS Reports

WebGrants: [MSC>MCS- Data Transfer>Report Download](#)

Report Type	Media Types	Description
Accept/Reject Report	Data File	<p>A list of students who had payments or corrections applied during the week. The report is broken down into three sections: Exception, Rejected and Accepted.</p> <p>Exception Section = This occurs when the system cannot define the type of transaction being applied. The txn is invalid or there is no valid txn in the file for the record. The majority of record in this section are from attempts to apply a payment & correction to the same student within the same file or week.</p> <p>Rejected Section = The payment or correction was rejected due to an edit in place for the txn. Many times the information being submitted is not in a correct format.</p> <p>Accepted Section = The payment or correction was accepted and applied to the student's record.</p>
Payment Activity Report	Report	A summary of payments made to institutions, reconciled payment transactions, amount of funds disbursed to institutions, payment transactions and balances. Including a summary of the Year-to-Date activity.
MCS CG Sync Report	Report	A listing of students who went through the MCS-Cal Grant data match process. It provides a summary of the students Cal Grant and MCS awards before and after the process ran. A summary of the students eligibility status is also provided.
Student Reconciliation Report	Data File & Report	A summary of reconciled payments greater than \$0 (to date). Payments with an existing adjustment reason code are not listed in the report.

Thank You

Institutional Support

Phone: (888) 294-0153

Fax: (916) 464-6499

SchoolSupport@csac.ca.gov

www.csac.ca.gov

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