

California Middle Class Scholarship Web Application

PAYMENT
AND
CORRECTIONS
GUIDE

The target audience for this user guide are individuals who utilize the California MCS application interface



Contents

Section 1: INTRODUCTION	5
Historical Changes	5
Eligibility Cap Rules Established	5
1.1 Scope	6
1.2 System Requirements	6
1.3 Accessibility Requirements	7
Section 2: MCS PAYMENT GUIDELINES	7
2.1 Reports	7
2.2 File Elements and Processing	7
2.3 UPLOADING MCS PAYMENT CORRECTION FILE	8
2.4 USING THE ONLINE PAYMENT ROSTER	15
Roster Information	17
Apply Payment	18
Delete a Payment or Correction	21
Reset Button	22
Back Button:	23
Section 3: MCS PROCESS CORRECTION GUIDELINES	24
3.1 Introduction	24
3.2 General Guidelines	24
3.3 MCS Correction Batch File Upload:	24
General Rules for uploading corrections via the payment file:	24
Correction Fields	25
Annual Level Changes:	25
Annual Level Corrections – When Payments are Reconciled:	26
Term Level Changes:	27
Term Level Corrections – When Payments are Reconciled:	29
Recertify Payments	29
Online Payment Roster Screen:	30
MCS Roster File Report:	31
3.4 MCS Correction using the Online Payment Roster	32
Section 4: MCS Report Download Guidelines	36
4.1 Introduction:	36
4.2 Downloading the MCS Roster File Report:	36
4.3 MCS Reports Available to Download	39

Admission File Report: 39
Enrollment File Report:..... 40
Award Rejects Report:..... 42
Fixing the Student Data Discrepancy: 42
Accept/Reject Report..... 43
Payment Activity Report: 47
MCS CG Sync Report: 488
Student Reconciliation Report: 49
MCS Payment Roster Reject Codes and Description..... 51
MCS Enrollment Ineligible & Reject Reason Codes 52
Attachment – Payment and Correction Scenarios

REVISION HISTORY

Date	Version #	Document Change
05/23/2018	.01	Updates to the 2017-18 and 2018-19 version
06/18/2018	Final	Final version

Section 1: INTRODUCTION

This user guide contains all essential information for the readers to understand the Middle Class Scholarship (MCS) Payment-Correction Process. The purpose of the guide is to describe the web application's functions and end-user interactions.

Historical Changes

The following changes were made to the MCS program based on legislation mandated for academic year (AY) 2016-2017, per Education Code, Section 70022.5:

- (a) A scholarship award under this article may be renewed for a total of the equivalent of four years of full-time attendance in an undergraduate program. Commencing with the 2016–17 AY, the total number of years of eligibility for grants pursuant to this article shall be based on the student's educational level in his or her course of study as designated by the institution of attendance when the recipient initially receives payment for a grant.
- (b) For a student enrolled in an institutionally prescribed five-year undergraduate program, a scholarship award under this article may be renewed for a total of up to five AYs of attendance if the student meets the requirements of Section 70022.
- (c) A recipient of a scholarship award under this article who has completed a baccalaureate degree, and who has been admitted to and is enrolled in a program of professional teacher preparation at an institution approved by the Commission on Teacher Credentialing, is eligible for, but not entitled to, renewal of the scholarship award for an additional AY of full-time attendance as long as the student meets the requirements of Section 70022.

Eligibility Cap Rules Established

1. The Education Level (EL) reported by the campuses in the Enrollment file will be used to establish the student's total MCS eligibility.
2. The "Year Established" is the AY in which the student was first disbursed an MCS payment.

NOTE: MCS disbursements made prior to the 2016-17 AY are not taken into consideration when determining the "Year Established" since an eligibility cap did not exist prior to the 2016-17 AY.

3. Effective 2016-2017 AY, CSAC will only allow an EL change during the student's initial MCS year if established.
4. Effective with the 2016-17 AY, if a student begins an academic year with less than 10.00% remaining MCS eligibility, the student will not be granted an MCS award due to insufficient eligibility.

5. Term eligibility will be used as follows for payments that are applied greater than \$0:
 - Full time at a semester school = 50.00%
 - Half time at a semester school = 25.00%
 - Full time at a quarter school = 33.33%
 - Half time at a quarter school = 16.67%
 - A Refund/Adjusted Payment transaction will use full eligibility if the payment applied is greater than \$0

6. Effective with the 2015-16 AY, the MCS “year-end/reconciliation” deadline occurs in September of each processing year.

1.1 Scope

The scope of the document is a high-level overview of the last software version’s features that have been developed and deployed. This document is not a comprehensive user manual. This document is not intended to supersede any of the processes, procedures, and/or policies that are currently in place for the MCS program.

1.2 System Requirements

The web application is designed for use with the following web browsers:

- Microsoft Internet Explorer version 9.0 or higher
- Mozilla Firefox version 29.0.1 or higher
- Google Chrome version 35.0.1916.114 or higher
- Apple Safari version 5.1.9 or higher

The computer should also meet the minimum system requirements provided by the manufacturer of the browser being used. The web application will perform best on computers with a high-speed internet connection like Digital Subscriber Line (DSL), cable, or faster. It is not recommended for use with computers using dial-up modem based internet connection.

Note: The MCS Payment-Correction File **must** be a fixed field length text file with an encoding of **ANSI** and shall **not** exceed 25MB.

1.3 Accessibility Requirements

To access the MCS web application, you **must** have a WebGrants user account. If you do **not** have a WebGrants user account, contact your WebGrants *System Administrator*. If your school does not have a *System Administrator*, contact the CSAC Help Desk at 1-888-294-0148 or by email at: CSACITServiceDesk@csac.ca.gov to request an account.

Section 2: MCS PAYMENT GUIDELINES

2.1 Reports

The MCS process requires schools to transmit student enrollment data to CSAC through the WebGrants system. The financial aid eligibility data included in the enrollment files allows CSAC to determine the maximum MCS award amounts for eligible students. Students awarded the MCS can view their award information on WebGrants for *Students*. The award information is also accessible to campuses via WebGrants, as well as the MCS Roster Report, which is downloadable as a data file.

There are two ways to submit a payment and correction:

1. Batch Upload (Section 2.3)
2. Online Payment Roster (Section 2.4)

CSAC will process the uploaded payment-correction files on Tuesday and Friday nights; therefore, updates to the records will be available on Wednesdays and Mondays. The delivery of funds is on a weekly basis, approximately one week after payments are processed.

ASSUMPTIONS:

To complete the MCS Payment-Correction process, the following assumptions have been made regarding the reporting individual. The individual has all the following:

- A valid WebGrants user account;
- Access to the MCS menu;
- Valid MCS Data to report;
- A valid MCS Payment-Correction File to upload

2.2 File Elements and Processing

Campuses use the following guidance when preparing to request MCS payments and corrections:

Field 9: ISIR/Cal ISIR—Transaction Number: Used for Financial Aid determination

Field 10: Student's Dependency Status—Dependent or Independent

Field 11: Total Income— Must be equal to or less than the maximum income allowed for the AY

Field 12: Student’s Federal Aid—Pell Grant, Federal Supplemental Educational Opportunity Grant (FSEOG), Teach Grant, Bureau Indian Affairs Grants (BIA)

Field 13: Student’s Institutional Grants and Fee Waivers—Need-based grants, Merit based scholarships, including athletic scholarships. The portion specifically designated for tuition and fees for mandatory fee waivers such as Alan Pattee, Veteran’s benefits designated for mandatory system wide tuition and fees, Other fee waivers (Vocational rehabilitation, employee tuition assistance, etc.), Education Opportunity Programs (EOP), Institutionally administered scholarships specifically designated for fees

Field 14: Student’s State Aid (Do not include Cal Grant Awards)—Chafee Grant, Child Development Grant, Law Enforcement Personnel Dependents Grant Program (LEPD), California National Guard Education Assistance Award Program (CNG EAAP)

Field 21: Fall MCS Award Payment—Amount paid to student

Field 28: Winter MCS Award Payment—Amount paid to student

Field 35: Spring MCS Award Payment—Amount paid to student

NOTE: Cal Grants are considered when determining MCS eligibility but are not reported by the school. CSAC will verify Cal Grant award values during the awarding process.

2.3 UPLOADING MCS PAYMENT CORRECTION FILE

1. Navigate to the WebGrants System login page. This is the entry point through which all authorized users can access the WebGrants application.
2. Enter the **User Name** and **Password** and select the **Sign-in** button.

The screenshot shows the login page for the California Student Aid Commission WebGrants System. At the top, there is a navigation bar with links for CSAC, Cal Grants, Cash for College, Cal Dream Act, and FAFSA. Below this is the CA.GOV logo and the California Student Aid Commission logo. A large orange banner with the word 'WEBGRANTS' is prominently displayed. The main content area includes a 'Welcome!' message and a 'Help With Your Account' link. There are two main buttons: 'Please sign in' and 'Need to create an account?'. Below the 'Please sign in' button, there is a form with fields for 'User Name' and 'Password', and a 'Sign-in' button. To the right of the form, there are several links for help and support, including 'For a School Administrator Account', 'For a User Account', 'For Browser Versions or Monitor Screen Area Settings', and 'Apple/Mac Computers'.

The system will display the **CSAC Portal Menu** screen upon successfully authenticating the login credentials:

The screenshot shows the 'California Student Aid Commission (SAPRD) WebGrants System' interface. At the top right are links for 'Tools', 'Help', and 'Sign Out'. The main header reads 'Welcome! SA9JXC To the CSAC Portal Menu'. A message states: 'The last time you logged on to this system was: 02/12/2018 11:24:40 am Number of failed attempts since your last login: 0'. Below this is a notice: 'Please contact your School's System Administrator if you need access to additional screens.' The interface is divided into two columns. The left column, titled 'Portal Menu', contains links for 'WebGrants', 'Table Edit', 'User Administration', 'APPLE', 'CA Dream Act', 'SB 70', and 'Middle Class Scholarship'. The right column, titled 'Account Information', contains links for 'View Your Account Details' and 'Help With Your Account'. At the bottom, there is a footer with 'Privacy Policy', 'Copyright 2000-2018, California Student Aid Commission', and 'Contact Us'.

Note: Depending on the profile authorization, there may be more options available in the CSAC Portal Menu.

3. Select the **Middle Class Scholarship** menu selection.

The screenshot shows the 'California Student Aid Commission WebGrants System' interface for user 'MCS_SCH'. At the top right are links for 'Tools', 'Help', and 'Sign Out'. The main header reads 'Welcome! MCS_SCH To the CSAC Portal Menu'. A message states: 'The last time you logged on to this system was: 02/13/2018 11:36:13 am Number of failed attempts since your last login: 1'. Below this is a notice: 'Please contact your School's System Administrator if you need access to additional screens.' The interface is divided into two columns. The left column, titled 'Portal Menu', contains links for 'WebGrants', 'User Administration', and 'Middle Class Scholarship'. The right column, titled 'Account Information', contains links for 'View Your Account Details' and 'Help With Your Account'. At the bottom, there is a footer with 'Privacy Policy', 'Copyright 2000-2018, California Student Aid Commission', and 'Contact Us'. A small revision note is visible at the bottom center: 'Revision: 9 Date: 12/14/2009 11:43:03 AM'.

The system will display the **Middle Class Scholarship Menu** screen:

The screenshot shows the 'California Student Aid Commission WebGrants System' interface. At the top left is the logo and 'California Student Aid Commission'. The main header reads 'California Student Aid Commission WebGrants System'. On the right, there are navigation links: 'Portal Menu', 'Middle Class Scholarship', 'Tools', 'Help', and 'Sign Out'. Below the header, a welcome message says 'Welcome! MCS_SCH To the Middle Class Scholarship Menu'. To the right of this, it displays 'The last time you logged on to this system was: 02/13/2018 11:36:13 am' and 'Number of failed attempts since your last login: 1'. A blue box contains the text: 'Please contact your School's System Administrator if you need access to additional screens.' Below this, there are two main menu sections. The 'Middle Class Scholarship Menu' section includes links for 'MCS - Data Transfer', 'MCS - Student Info', and 'MCS - Roster'. The 'Account Information' section includes links for 'View Your Account Details' and 'Help With Your Account'. At the bottom, there are links for 'Privacy Policy' and 'Contact Us', along with copyright information: 'Copyright 2000-2018, California Student Aid Commission' and 'Revision: 9 Date: 12/14/2009 11:43:03 AM'.

4. Select the “MCS – Data Transfer” option.

The system will display the **MCS – Data Transfer Menu** screen:

The screenshot shows the 'MCS - Data Transfer Menu' screen. At the top left is the logo and 'California Student Aid Commission'. The main header reads 'California Student Aid Commission WebGrants System'. On the right, there are navigation links: 'Portal Menu', 'Middle Class Scholarship', 'Tools', 'Help', and 'Sign Out'. Below the header, there are three sub-menu links: 'MCS - Data Transfer', 'MCS - Student Info', and 'MCS - Roster'. Below these, there are three buttons: 'MCS - Data Transfer', 'File Upload', and 'Report Download'. The main content area is titled 'MCS - Data Transfer Menu' and contains two links: 'File Upload' and 'Report Download'.

1. Select the File Upload menu selection
2. The system will display the **MCS File Upload** screen
3. If requested, enter the **School ID**, select the **Academic Year** and select the **File Type**
Under **File Type**, select “Payment”
4. Select the **File** to upload by selecting the **Browse** button
5. Select the **Upload** button

File Upload

- File Type must be .txt.
- Enter the file path and name of your file (Use the Browse button to find your file).
- Click the Upload button to start this operation.
- If the file validation fails, no data will be uploaded. Please correct error and upload.
- Please ensure your file encoding is ANSI.

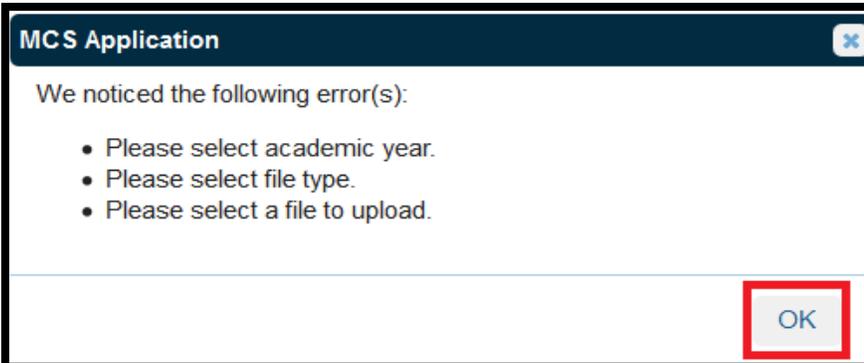
School ID

Acad Year

File Type

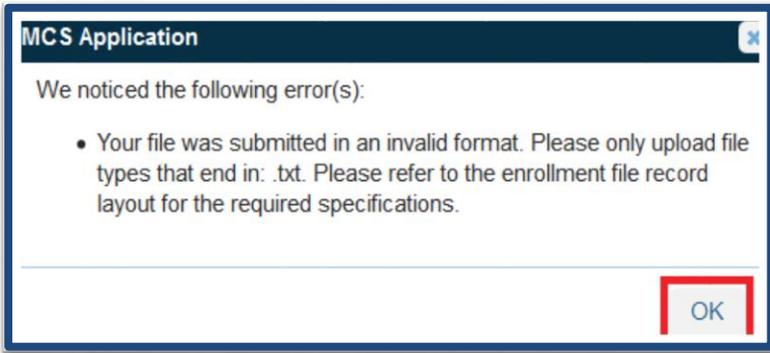
Select File

If the **Academic Year**, **File Type**, and **File** are not selected, the system will display an exception message.



If the file type does not comply with file format requirements, the system will display an exception message.

Note: The file format **must** be a **fixed field length text file** with an encoding of **ANSI** and shall **not** exceed 25MB



Successful Upload

If the file passes the file format validation, the system will display the **MCS Successful Upload** dialogue box.



Once successfully uploaded, the system will display the **MCS File Upload Status** embedded panel which provides a high- level overview of the file status.

There are no invalid records for the file below:

File Upload

- File Type must be .txt.
- Enter the file path and name of your file (Use the Browse button to find your file).
- Click the Upload button to start this operation.
- If the file validation fails, no data will be uploaded. Please correct error and upload.
- Please ensure your file encoding is ANSI.

School ID Acad Year File Type

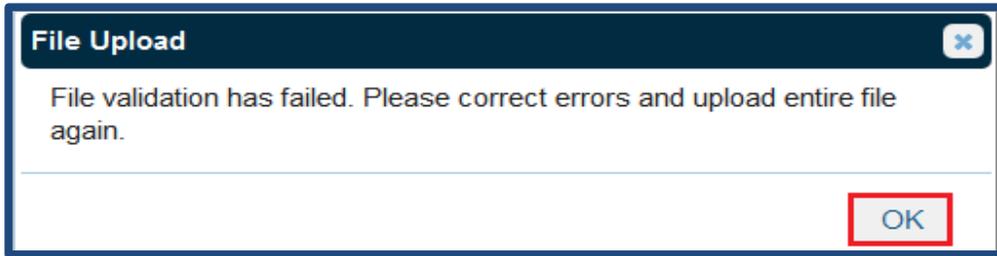
Select File No file selected.

File Upload Status

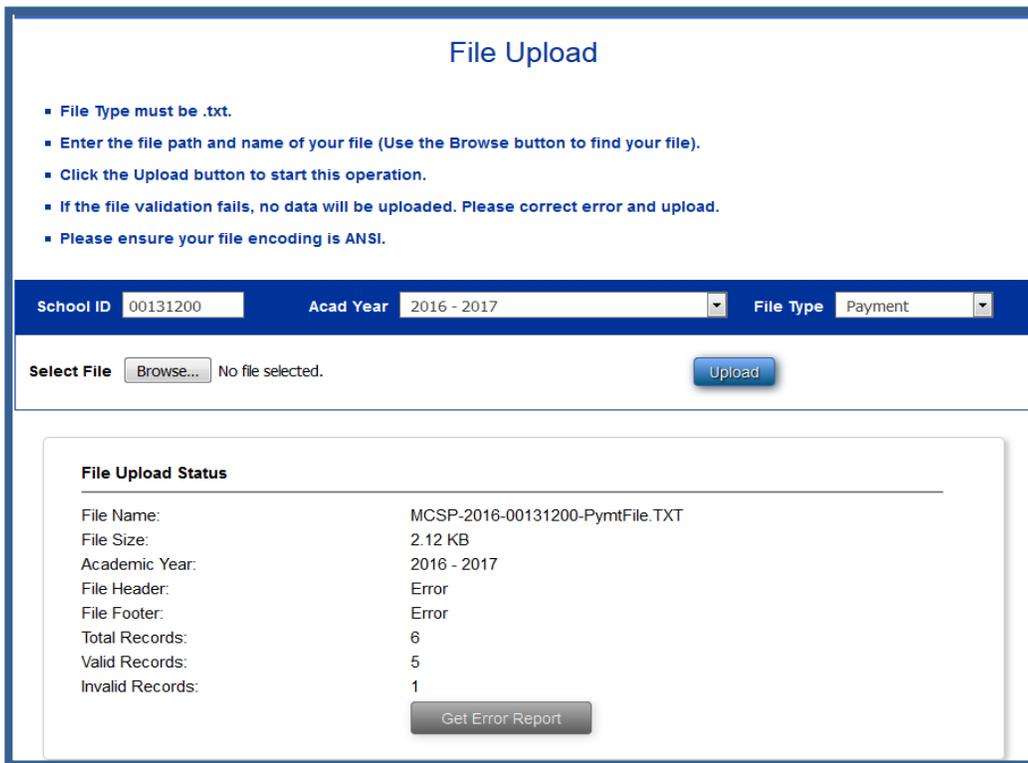
File Name:	MCSP-2016-00131200-PYMTTESTFILE.TXT
File Size:	2.13 KB
Academic Year:	2016 - 2017
File Header:	OK
File Footer:	OK
Total Records:	6
Valid Records:	6
Invalid Records:	0

Failed Upload

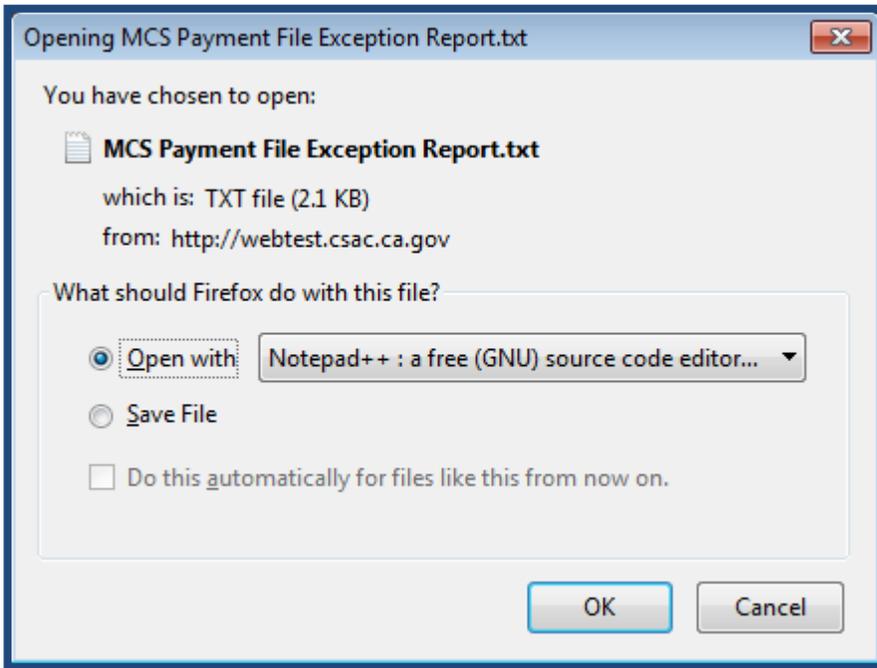
If the file fails the field level validation, the system will reject the file and display an exception message. The file **must** be corrected and the **entire file** must be **uploaded** again.



In the **File Upload Status** panel, you will see the **Get Error Report** button. This is only created when invalid records are discovered in the file.



Clicking the button will display the **MCS Payment File Format Exception Report** dialogue box.



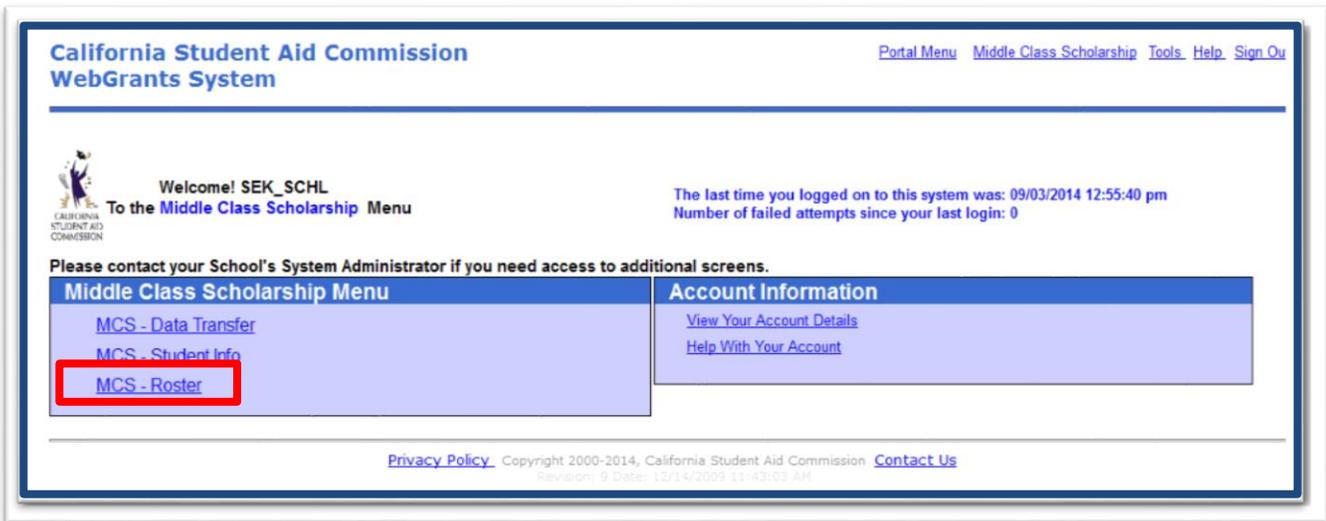
The system will display the **MCS Payment File Format Exception Report** which provides the details of the errors for each of the invalid records.

CALIFORNIA STUDENT AID COMMISSION					
MCS Payment File Format Exception Report					
UNIV OF CA - BERKELEY					
					11/14/2016 1:40:24 PM
File Header/Footer error:					
MCSF09	001312008UNIV OF CA - BERKELEY	201611142016			
Incorrect length of file header					
MCFT09	001312008UNIV OF CA - BERKELEY	201611142016000000000006			
Incorrect length of file footer					
Transaction line error:					
00131212016111111111SADDLE	LEVI	J19960826021	3	00000	
Line length error.					

Correct the invalid records in the file and resubmit the entire file.

2.4 USING THE ONLINE PAYMENT ROSTER

From the **Middle Class Scholarship** menu, select MCS – Roster:



California Student Aid Commission
WebGrants System

Portal Menu Middle Class Scholarship Tools Help Sign Out

Welcome! SEK_SCHL
To the Middle Class Scholarship Menu

The last time you logged on to this system was: 09/03/2014 12:55:40 pm
Number of failed attempts since your last login: 0

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

Middle Class Scholarship Menu	Account Information
MCS - Data Transfer	View Your Account Details
MCS - Student Info	Help With Your Account
MCS - Roster	

[Privacy Policy](#) Copyright 2000-2014, California Student Aid Commission [Contact Us](#)
Revision: 9 Date: 12/14/2009 11:43:03 AM

The system will display the **MCS – Roster Menu** screen. Select **MCS Display Roster**.



California Student Aid Commission
WebGrants System

Portal Menu Middle Class Scholarship Tools Help Sign Out

[MCS - Data Transfer](#) [MCS - Student Info](#) [MCS - Roster](#)

[MCS - Roster](#) [MCS Display Roster](#)

MCS - Roster Menu
MCS Display Roster

[Privacy Policy](#) Copyright 2000-2014, California Student Aid Commission [Contact Us](#)
Revision: 9 Date: 12/14/2009 11:43:03 AM

The system will display the **Middle Class Scholarship – School Roster** screen where the user can view the roster list by entering the **School ID** and **Acad Year**. The user can then search for the student by either entering the student’s **SSN** or **CSAC ID**, or **First Name** and/or **Last Name**.

California Student Aid Commission (TEST1) Portal Menu Middle Class Scholarship Tools Help Sign Out
WebGrants System MCS - Data Transfer MCS - Student Info MCS - Roster

MCS - Roster MCS Display Roster

Middle Class Scholarship - Online Payment Roster CSU SACRAMENTO

- Enter the School ID for Search.
- Enter the SSN/CSAC ID or First Name or Last Name to refine the Search results.
- Partial first name with minimum 3 characters.
- Partial last name with minimum 2 characters.

School ID Acad Year Search ID

First Name Last Name Recertify Only

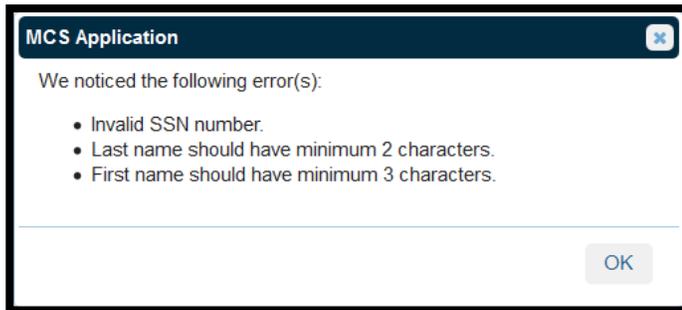
The system will generate a list of the search results. Click on a row to access the student’s roster information.

School ID Acad Year Search ID

First Name Last Name Recertify Only

SSN	CSAC ID	Last Name	First Name	DOB
<input type="text"/>				
<input type="text"/>				
<input type="text"/>				
<input type="text"/>				

If the **SSN/CSAC ID, First Name** or **Last Name** is missing and/or the search criteria is invalid, the system will generate an error message:



Roster Information

The system will display the **MCS Online Payment Roster** that shows the student's **Demographic Information, Annual Data** and **Term** level data.

Verify the **Demographic Information** and **Annual Data**:

1. If the student's annual data is incorrect, submit a *Correction* first rather than a payment; or
2. If the student's annual data is correct, proceed with applying a payment.

Apply Payment

Click on the **Payment** radio button. Under **Fall Term**, select the **Enrollment Status** of the student: FT - (Pay), Less than Half-time (Do Not Pay), Not Enrolled or HT – (Pay). Only students attending Half-time or more will qualify for a payment. Payments can only be applied to open terms.

Demographic Information		Annual Data	
CSAC ID:		Academic Year:	2017 - 2018
SSN No:		Open Terms:	Fall, Winter, Spring
DOB:		Total Income:	\$29,990
Cal Grant Award:	\$0	Federal Aid:	\$0
Annual Tuition/Fees:	\$5,742	Institutional Aid:	\$0
Annual Award:	\$2,298	State Aid:	\$0
Asset Amount:	\$0	ISIR Tran #:	01
TCP/5th Yr-Indicator:		Eligibility Change:	--- SELECT ---
Education Level:	3rd year/junior		Payment History
Total Elig.-%:	200.00		
Used Elig.-%:	50.00		
Remain Elig.-%:	150.00		
Year Entered:	2016		

Transaction Type: Correction Payment

FALL TERM	SPRING TERM
Enrollment Status: --- SELECT ---	Enrollment Status: --- SELECT ---
Term Award Amount: \$1,149	Term Award Amount: \$1,149
Adj. Reason Code: --- SELECT ---	Adj. Reason Code: --- SELECT ---
Amount Paid/Verified:	Amount Paid/Verified:
Tuition/Fees: \$2,871	Tuition/Fees: \$2,871
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

Save Back Reset

Demographic Information		Annual Data	
CSAC ID:	<input type="text"/>	Academic Year:	2017 - 2018
SSN No:	<input type="text"/>	Open Terms:	Fall, Winter, Spring
DOB:	<input type="text"/>	Total Income:	\$29,990 <input type="text"/>
Cal Grant Award:	\$0	Federal Aid:	\$0 <input type="text"/>
Annual Tuition/Fees:	\$5,742	Institutional Aid:	\$0 <input type="text"/>
Annual Award:	\$2,298	State Aid:	\$0 <input type="text"/>
Asset Amount:	\$0	ISIR Tran #:	01 <input type="text"/>
TCP/5th Yr-Indicator:		Eligibility Change:	<input type="text" value="--- SELECT ---"/> Payment History
Education Level:	3rd year/junior		

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 [\$1,149]	Term Award Amount [\$1,149]
Adj. Reason Code	Adj. Reason Code <input type="text" value="--- SELECT ---"/>
Amount Paid/Verified	Amount Paid/Verified
Tuition/Fees [\$2,871]	Tuition/Fees [\$2,871]
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

Once the student's **Enrollment Status** has been selected, the system will automatically populate the Amount Paid/Verified field under **Fall Term** with the payment amount. If the **Enrollment Status** and payment amount is correct, click on the **Save** button to apply the payment(s).

FALL TERM		SPRING TERM	
Enrollment Status:	<input type="text" value="FT - (Pay)"/>	Enrollment Status	<input type="text" value="--- SELECT ---"/>
Term Award Amount [\$1,149]	<input type="text" value="\$1,149"/>	Term Award Amount [\$1,149]	<input type="text" value="\$1,149"/>
Adj. Reason Code	<input type="text" value="--- SELECT ---"/>	Adj. Reason Code	<input type="text" value="--- SELECT ---"/>
Amount Paid/Verified	<input type="text" value="\$ 1,149"/>	Amount Paid/Verified	<input type="text"/>
Tuition/Fees [\$2,871]	<input type="text"/>	Tuition/Fees [\$2,871]	<input type="text"/>
Federal Aid [\$0]	<input type="text"/>	Federal Aid [\$0]	<input type="text"/>
Institutional Aid [\$0]	<input type="text"/>	Institutional Aid [\$0]	<input type="text"/>
State Aid [\$0]	<input type="text"/>	State Aid [\$0]	<input type="text"/>
Payment Status:	Not Reconciled	Payment Status:	Not Reconciled

After you click *Save*, the system will generate a pop-up box confirming the transaction has been saved. Click "OK" to proceed.

\$0

MCS Payment Roster - Save ✕

Transaction saved successfully.

\$5,742

\$2,298
\$0

3rd year/junior

Transaction Type:
 Correction
 Payment

Delete a Payment or Correction

To delete a transaction, search for the student's record and click on the **Payment** or **Correction** radio button. The **Delete** button will appear to proceed with deleting the transaction.

NOTE: The delete button will only appear on a roster where a transaction has been submitted, but not processed (pending transaction).

Demographic Information		Annual Data	
CSAC ID:		Academic Year:	2017 - 2018
SSN No:		Open Terms:	Fall, Winter, Spring
DOB:		Total Income:	\$29,990 <input type="text"/>
Cal Grant Award:	\$0	Federal Aid:	\$0 <input type="text"/>
Annual Tuition/Fees:	\$5,742	Institutional Aid:	\$0 <input type="text"/>
Annual Award:	\$2,298	State Aid:	\$0 <input type="text"/>
Asset Amount:	\$0	ISIR Tran #:	01 <input type="text"/>
TCP/5th Yr-Indicator:		Eligibility Change:	<input type="text" value="-- SELECT --"/> Payment History
Education Level:	3rd year/junior		
Total Elig-%:	200.00		
Used Elig-%:	50.00		
Remain Elig-%:	150.00		
Year Entered:	2016		

Transaction Type: Correction **Payment**

After you click Delete, the system will generate a confirmation message. Click **OK** to proceed.

MCS Roster - Delete Transaction

Are you sure you want to delete the transaction

Reset Button

Selecting the "Reset" button will remove/clear out any data that you have entered, prior to saving the transaction.

FALL TERM		SPRING TERM	
Enrollment Status:	<input type="text" value="--- SELECT ---"/>	Enrollment Status	<input type="text" value="--- SELECT ---"/>
Term Award Amount [\$1,149]	<input type="text" value="\$1,149"/>	Term Award Amount [\$1,149]	<input type="text" value="\$1,149"/>
Adj. Reason Code	<input type="text" value="--- SELECT ---"/>	Adj. Reason Code	<input type="text" value="--- SELECT ---"/>
Amount Paid/Verified	<input type="text"/>	Amount Paid/Verified	<input type="text"/>
Tuition/Fees [\$2,871]	<input type="text"/>	Tuition/Fees [\$2,871]	<input type="text"/>
Federal Aid [\$0]	<input type="text"/>	Federal Aid [\$0]	<input type="text"/>
Institutional Aid [\$0]	<input type="text"/>	Institutional Aid [\$0]	<input type="text"/>
State Aid [\$0]	<input type="text"/>	State Aid [\$0]	<input type="text"/>
Payment Status:	Not Reconciled	Payment Status:	Not Reconciled

Back Button:

Selecting the “Back” button will return you to the list of students under the main MCS School Roster screen.

FALL TERM		SPRING TERM	
Enrollment Status:	<input type="text" value="--- SELECT ---"/>	Enrollment Status	<input type="text" value="--- SELECT ---"/>
Term Award Amount [\$1,149]	<input type="text" value="\$1,149"/>	Term Award Amount [\$1,149]	<input type="text" value="\$1,149"/>
Adj. Reason Code	<input type="text" value="--- SELECT ---"/>	Adj. Reason Code	<input type="text" value="--- SELECT ---"/>
Amount Paid/Verified	<input type="text"/>	Amount Paid/Verified	<input type="text"/>
Tuition/Fees [\$2,871]	<input type="text"/>	Tuition/Fees [\$2,871]	<input type="text"/>
Federal Aid [\$0]	<input type="text"/>	Federal Aid [\$0]	<input type="text"/>
Institutional Aid [\$0]	<input type="text"/>	Institutional Aid [\$0]	<input type="text"/>
State Aid [\$0]	<input type="text"/>	State Aid [\$0]	<input type="text"/>
Payment Status:	Not Reconciled	Payment Status:	Not Reconciled

School ID	<input type="text" value="00115000"/>	Acad Year	<input type="text" value="2017 - 2018"/>	Search ID	<input type="text" value="SSN"/>	<input type="text"/>
First Name	<input type="text"/>	Last Name	<input type="text"/>	<input type="checkbox"/> Recertify Only	<input type="button" value="Search"/>	

SSN	CSAC ID	Last Name	First Name	DOB
<input type="text"/>				
<input type="text"/>				
<input type="text"/>				
<input type="text"/>				

Section 3: MCS PROCESS CORRECTION GUIDELINES

3.1 Introduction

The correction process is used to update student award information. Due to the limited funding available, the CSAC must recalculate each student's award and provide any revised award values to the campus. The process of submitting corrections will allow the CSAC to maintain and monitor the funding level each year, and ensure the program is not over subscribed. The two methods that are available to submit corrections are via the batch file upload process and the Online Payment Roster screen functionality. Both methods will be reconciled during the mid-week or week-end processing. Changes will be available the following Wednesday or Monday.

3.2 General Guidelines

When a student has been awarded the MCS, but new information is available that may affect the student's eligibility or award, the campus must follow the correction process to have the CSAC recalculate that student's award. In general, the following hierarchy of changes should be applied:

1. Annual level changes, such as a student's total income or other aid, should be submitted before term level changes or payment transactions.
2. Term level changes, such as a student's tuition and fees, should be submitted before payment transactions. Term level corrections can only be made for terms that are currently open. For example, if the Winter and Spring terms are closed, a campus will only be able to submit changes for the Fall term.
3. Payment transactions should only be applied once a student's award information has been verified as accurate.

3.3 MCS Correction Batch File Upload:

Uploading correction records for MCS follows the same process as **2.3 – Uploading the MCS Payment File**. When uploading corrections, a campus will select the "Payment" File Type. Within the file record layout, field 42 (Transaction Type), would be changed from a "P" – for Payment Information to a "C" – for Correction.

General Rules for uploading corrections via the payment file:

1. Correction and payment transactions may be submitted within the same file, **but not for the same record**. If the same record is submitted for a correction or payment, the system will only apply either one or possibly reject both transaction types.
2. When submitting a correction for a student, you may only submit an Annual level correction **or** Term level correction within the same file. Annual and Term level corrections cannot be submitted for the same student record, in the same file, or else the transactions

will be rejected. When possible, please follow the correction process hierarchy, in section 3.2, to determine which correction to submit first. Multiple term level corrections are allowed within the same week.

3. Corrections may only be submitted for “open” terms.

Correction Fields

When submitting corrections via a batch file upload, if any of the following fields are provided in the file, CSAC’s system will assume a student’s MCS award should be recalculated:

Annual Level Changes:

Annual level changes should be performed when the campus has updated information on total income, federal financial aid, institutional aid and state aid that could potentially impact the student’s MCS award eligibility and amount. When annual level corrections are submitted, CSAC will recalculate the student’s MCS award during the weekly processes and update the MCS roster accordingly the following Wednesday or Monday. If the student remains eligible, and their award value has gone up or down, new information will be available to the campus the following Wednesday or Monday. If the change in total income results in a student no longer being eligible for their MCS award, the student will be removed from the roster.

Field #11 – Total Income: Only provide a value in this field if you are submitting a correction to previously reported Total Income. In addition to submitting a value in field 11, a value of “3” should be submitted in field 41 (noting a change in eligibility), and a value of “C” should be reported in field 42 (noting the Transaction Type as a “Correction”).

Field #12 – Student’s Federal Aid: Only provide a value in this field if you are submitting a correction to previously reported Federal Aid. In addition to submitting a value in field #12, a value of “3” should be submitted in field 41 (noting a change in eligibility), and a value of “C” should be reported in field 42 (noting the Transaction Type as a “Correction”).

Field #13 – Student’s Institutional Grants and Fee Waivers: Only provide a value in this field if you are submitting a correction to previously reported Institutional Grants and Fee Waivers. In addition to submitting a value in field #13, a value of “3” should be submitted in field 41 (noting a change in eligibility), and a value of “C” should be reported in field 42 (noting the Transaction Type as a “Correction”).

Field #14 – Student’s State Aid: Only provide a value in this field if you are submitting a correction to previously reported State Aid. In addition to submitting a value in field #14, a value of “3” should be submitted in field 41 (noting a change in eligibility), and a value of “C” should be reported in field 42 (noting the Transaction Type as a “Correction”).

NOTE: As a reminder, when reporting State Aid, at the annual or term level, Cal Grant awards should be **EXCLUDED** from any value reported by the campus. CSAC will identify if a student has a Cal Grant and factor that in during the award calculation.

Field #41 – Eligibility Change (for Academic Year): This field is always used when making corrections at an annual level. If there is a value provided in this field, then a value of “C” should be reported in field 42 (noting the Transaction Type as a “Correction”):

- The following data values result in the student being withdrawn from the campus roster:
 - 1 - Post Bacc
 - 2 - SAP
 - 4 - Not Enrolled
 - 5 - Other
 - 7 - Over Asset Ceiling

By submitting one of these values, the student is considered no longer eligible for the MCS award unless other information is received by CSAC. The student’s MCS award will be withdrawn, and the student will be removed from the roster.

- If the data value submitted is:
 - The value of 3 (Eligibility), then the school is required to provide one or more values in fields 11 through 14 (Total Income, Federal Aid, Institutional Aid, State Aid). CSAC will use that new information to recalculate the student’s award. If no new value is provided in one of the additional fields, then the recalculation will be performed using the existing values previously submitted.
 - The value of 8 (Add Teacher Credential Program/5th Year Program Flag), CSAC will recalculate the student’s award amount at the annual level using the stored amounts designated for the program by segment type.
 - The value of 9 (Remove TCP/5th Year Program), CSAC will recalculate the student’s award amount at the annual level using the standard Tuition/Fees amount for the segment type.

Annual Level Corrections – When Payments are Reconciled:

- The following data values result in the student being withdrawn from the campus roster:
 - 1 - Post Bacc
 - 2 - SAP
 - 4 - Not Enrolled
 - 5 - Other
 - 7 - Over Asset Ceiling

If a payment exists for this student, the transaction will be rejected. The school is responsible for determining if the student should have received all or part of the payment. The school must address the payment change **PRIOR** to submitting one of the values.

- If the data value submitted is a 3, 8 or 9 (Eligibility, Add Teacher Credential Program/5th Year Program Flag or Remove TCP/5th Year Program) and a payment exists for this

student, the award will be recalculated and the school will be required to recertify the payment amount.

NOTE: This includes records where the eligibility change or recalculation process results in the student no longer being eligible for MCS award consideration. In these cases, the student's MCS award will be set to \$0.00, and the school will be required to recertify the \$0.00 payment amount. After the recertification takes place, the student will be removed from the campus roster.

Term Level Changes:

These changes should be performed when the campus needs to update information on a specific term's tuition, federal financial aid, institutional aid and state aid. CSAC will recalculate the student's MCS award for that term only during the weekly processes, and update the MCS roster accordingly the following Wednesday and Monday. After the recalculation, the term amounts may not equal since a specific term was re-evaluated. However, the sum of all terms amount will equal the annual MCS award amount.

Field #22/29/36 – Fall/Winter/Spring Adjustment Reason Code: Used to indicate term adjustment reasons. Valid content includes numeric values 1, 2, 3, 4, 5 and 7. Value 6 is used by CSAC to alert the campus that the term's payment amount requires recertification. **Adjustment reason code 8 (Add TCP) is no longer available at the term level.**

- If the school provides a value of **3 or 4 (Eligibility or Fees)**, then a value of "C" must also be submitted in field 42 (Transaction Type). If not, then the record will be rejected. If selecting 3 or 4, values must also be reported in fields 23-26/30-33/37-40. CSAC will use the new reported information to recalculate the student's award for the applicable term. The Annual Award Amount will be adjusted to reflect the new term amount.
- If the school provides a value of **1, 2, 5 or 7 (Post Bacc, SAP, Refund/Adjusted Payment or Other)**, then a value of "P" must also be submitted in field 42 (Transaction Type). If not, then the record will be rejected.
- If the school submits a value of **1, 2, or 7 (Post Bacc, SAP or Other)**, then the school must also submit a value of zero in field 21/28/35 (Fall/Winter/Spring MCS Award Payment). This indicates that the student is not eligible for the term and should not be paid for the Fall/Winter/Spring term and should remain on their roster. Using the values of 1, 2 or 7 will reduce the term award amount to zero.

NOTE: The ineligible term status of Post Bacc, SAP or Other should be applied to one term and not across the board. If the student is ineligible for the entire year, then the transaction needs to be applied at the annual level.

- If a payment has already been made for this student, the difference between the previous payment amount and the "zero" payment amount will be taken into consideration during the school reconciliation process.

Field #23/30/37 – Fall/Winter/Spring Tuition/Fee Amount: Used to adjust a student’s term specific Tuition/Fee amount.

CSAC will provide a value in this field based on the reported tuition and fees for UC and CSU campuses. The annual value is then divided by the applicable term amounts specific to your campus.

If a different value is reported in this field by the campus, it cannot exceed the Tuition/Fee amount for the term. When reporting changes to the term Tuition/Fee amounts, you must also indicate a “C” in field 42 to indicate the transaction type is a Correction. In addition to field 42, an adjustment reason code of 4 (Fees) must be indicated in field 22/29/36 (for the Fall/Winter/Spring term). Adjustment reason code of 3 (Eligibility) may also be used but the Fees code of 4 is preferred when making updates to the student’s Tuition/Fee at the term level.

Field #24/31/38 – Fall/Winter/Spring Federal Aid Amount: Used to adjust a student’s term specific Federal Aid amount.

CSAC will provide a value in this field (the annual Federal Aid amount divided by the number of terms).

If a different value is reported in this field by the campus, it cannot exceed the annual Federal Aid amount. When reporting changes to the term Federal Aid amounts, you must also indicate a “C” in field 42 to indicate the transaction type is a Correction. In addition to field 42, an adjustment reason code of 3 (Eligibility) must also be reported in field 22/29/36 (for the Fall/Winter/Spring term).

Field #25/32/39 – Fall/Winter/Spring Institutional Aid Amount: Used to adjust a student’s term specific Institutional Aid amount.

CSAC will provide a value in this field (the annual Institutional Aid Amount divided by the number of terms).

If a different value is reported in this field by the campus, it cannot exceed the annual Institutional Aid amount. When reporting changes to the term Institutional Aid amounts, you must also indicate a “C” in field 42 to indicate the transaction type is a Correction. In addition to field 42, an adjustment reason code of 3 (Eligibility) must also be reported in field 22/29/36 (for the Fall/Winter/Spring term).

Field #26/33/40 – Fall/Winter/Spring State Aid Amount: Used to adjust a student’s term specific State Aid amount (excluding Cal Grant).

CSAC will provide a value in this field (the annual State Aid amount divided by the number of terms).

If a different value is reported in this field by the campus, it cannot exceed the annual State Aid amount. When reporting changes to the term State Aid amounts, you must also indicate a “C” in field 42 to indicate the transaction type is a Correction. In addition to field 42, an adjustment

reason code of 3 (Eligibility) must also be reported in field 22/29/36 (for the Fall/Winter/Spring term).

NOTE: As a reminder, when reporting State Aid, at the annual or term level, Cal Grant awards should be **EXCLUDED** from any value reported by the campus. CSAC will identify if a student has a Cal Grant and factor that in during the award calculation.

Term Level Corrections – When Payments are Reconciled:

If the **data value submitted is 3 or 4 (Eligibility or Fees)** and a payment exists for the student, the term award will be recalculated and the school will be required to recertify the payment amount.

When applying the recertify amount for a “Recertify Payment,” the payment cannot be greater than the recalculated Term Award Amount. The amount must be less than or equal to the Term Award Amount.

NOTE: This includes records where the Eligibility/Fee change recalculation process results in an MCS Term Award amount = \$0.00. In the instances where this particular term is the only term that the student is attending, the student’s annual MCS award will also be set to \$0.00, and the school will be required to recertify the \$0.00 payment amount. After the recertification takes place, the student will be removed from the school’s roster.

Recertify Payments

Students who have payments in a “Recertify Payment” status can be searched through the **Online Payment Roster Screen** or found in the **MCS Roster File Report**. To recertify means the campus needs to go in and verify the new payment amount. Recertify happens when the student was previously paid for the term(s) and a correction was applied at the annual and/or term level. The MCS/Cal Grant match process could also cause payments to go into a recertify status. The update to the student’s record triggered the award to be recalculated which then alters the payment amount that was in place.

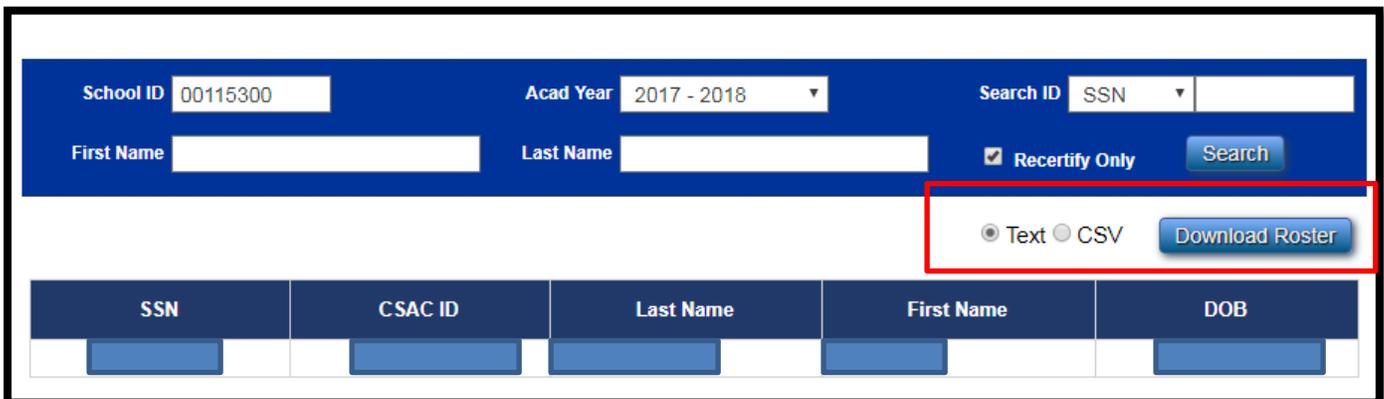
Online Payment Roster Screen:

Enter the school code along with selecting the academic year, check the “Recertify Only” box and click on the Search button.



School ID 00115000 Acad Year 2017 - 2018 Search ID SSN
First Name Last Name Recertify Only Search

The system will display a list of students who have payments in a “Recertify Payment” status. The list of students can be exported by choosing the file type and selecting the Download Roster button.



School ID 00115300 Acad Year 2017 - 2018 Search ID SSN
First Name Last Name Recertify Only Search
 Text CSV Download Roster

SSN	CSAC ID	Last Name	First Name	DOB

A payment in this status is identified at the term level by having a [Recertify Payment] status display under the “Adj. Reason Code” field in red font.

NOTE: If the campus does not have any existing payments in this status, the system will generate a message stating “No data found”.

In the example below, the student was originally paid at \$951 for the Fall and Spring terms. When the award was recalculated, it did so at a lower award amount of \$822 per term. The new payment must now be recertified at the \$822 amount. Payments being recertified must match the Term Award Amount.

3.4 MCS Correction using the Online Payment Roster

All correction transactions can be handled through either the batch upload process or individually utilizing the MCS Online Payment Roster screen.

Below is an example of making an Annual Level change (Total Income) and a Term Level change (decreased Tuition/Fee). For more descriptions of potential correction and/or payment scenarios, please reference Attachment 1 for the corresponding steps needed to complete the transaction. The steps are provided for the manual and payment file process.

Correction Process Examples:

Example 1: Adjusting a student's Total Income via the MCS Online Payment Roster Screen (Annual Level Change)

From the MCS School Roster section, select the student you would like to report a correction for. Then, on the Online Payment Roster screen, select the following criteria:

- “Correction” radio button
- “Eligibility” from the “Eligibility Change” drop down box in the “Annual Data” section
- Enter the student’s new Total Income in the “Total Income” field
- If applicable, report the ISIR transaction number associated with the correction
- Click the “Save” button

Demographic Information		Annual Data	
CSAC ID:		Academic Year:	2017 - 2018
SSN No:		Open Terms:	Fall, Winter, Spring
DOB:		Total Income:	\$29,990 <input type="text" value="\$ 25,000"/>
Cal Grant Award:	\$0 Total Elig-%: 200.00	Federal Aid:	\$0 <input type="text"/>
Annual Tuition/Fees:	\$5,742 Used Elig-%: 50.00	Institutional Aid:	\$0 <input type="text"/>
Annual Award:	\$2,298 Remain Elig-%: 150.00	State Aid:	\$0 <input type="text"/>
Asset Amount:	\$0 Year Entered: 2016	ISIR Tran #:	01 <input type="text" value="02"/>
TCP/5th Yr-Indicator:		Eligibility Change:	<input type="text" value="Eligibility"/> Payment History
Education Level:	3rd year/junior		

Transaction Type: Correction Payment

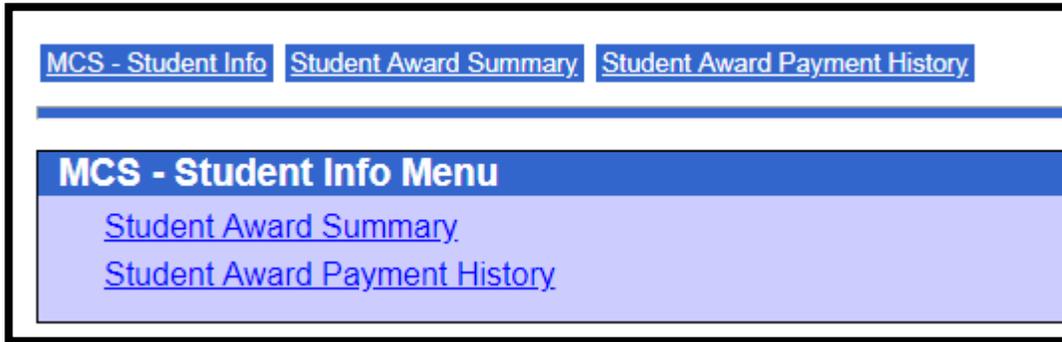
FALL TERM	SPRING TERM
Enrollment Status: <input type="text" value="--- SELECT ---"/>	Enrollment Status <input type="text" value="--- SELECT ---"/>
Term Award Amount <input type="text" value="\$1,149"/> [\$1,149]	Term Award Amount <input type="text" value="\$1,149"/> [\$1,149]
Adj. Reason Code <input type="text" value="--- SELECT ---"/>	Adj. Reason Code <input type="text" value="--- SELECT ---"/>
Amount Paid/Verified <input type="text"/>	Amount Paid/Verified <input type="text"/>
Tuition/Fees <input type="text"/> [\$2,871]	Tuition/Fees <input type="text"/> [\$2,871]
Federal Aid <input type="text"/> [\$0]	Federal Aid <input type="text"/> [\$0]
Institutional Aid <input type="text"/> [\$0]	Institutional Aid <input type="text"/> [\$0]
State Aid <input type="text"/> [\$0]	State Aid <input type="text"/> [\$0]
Payment Status: Not Reconciled	Payment Status: Not Reconciled

A pop up box will confirm that your transaction has been saved. Once a transaction has been saved, the newly reported data will be reflected the following Wednesday or Monday after CSAC completes the processing of files.

If after saving the transaction, you would like to delete the submission, you can do so by pulling up the student record again and selecting the "Correction" radio button, then selecting the "Delete" button.

Note: You can delete the transaction prior to processing. The transaction cannot be deleted after it has been processed.

Once a correction has been processed, you can view it under the MCS Student Award Payment History Screen; or from the MCS Online Payment Roster screen, click on the “Payment History” link found in the Annual Data section.



Annual Data	
Academic Year:	2017 - 2018
Open Terms:	Fall, Winter, Spring
Total Income:	\$29,990 <input type="text"/>
Federal Aid:	\$0 <input type="text"/>
Institutional Aid:	\$0 <input type="text"/>
State Aid:	\$0 <input type="text"/>
ISIR Tran #:	01 <input type="text"/>
Eligibility Change:	<input type="text" value="--- SELECT ---"/> Payment History

The MCS Student Award Payment History screen will provide information on any payments and/or corrections that have been processed for that student at both the annual and term level.

Example 2: Decreasing a Student’s Tuition/Fees to a Term (Term Level Change)

From the MCS School Roster section, select the student you would like to report a correction for. On the Online Payment Roster screen, select the following criteria:

- Select the “Correction” radio button
- Select “Fees” from the Adj. Reason Code drop down field under the FALL TERM section
- Enter the reduced tuition amount in the Tuition/Fees field
- Click the “Save” button

Demographic Information		Annual Data	
CSAC ID:	<input type="text"/>	Academic Year:	2017 - 2018
SSN No:	<input type="text"/>	Open Terms:	Fall, Winter, Spring
DOB:	<input type="text"/>	Total Income:	\$29,990 <input type="text"/>
Cal Grant Award:	\$0	Federal Aid:	\$0 <input type="text"/>
Annual Tuition/Fees:	\$5,742	Institutional Aid:	\$0 <input type="text"/>
Annual Award:	\$2,298	State Aid:	\$0 <input type="text"/>
Asset Amount:	\$0	ISIR Tran #:	01 <input type="text"/>
TCP/5th Yr-Indicator:		Eligibility Change:	<input type="text" value="--- SELECT ---"/> Payment History
Education Level:	3rd year/junior		

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 <input type="text" value="\$1,149"/> [\$1,149]	Term Award Amount <input type="text" value="\$1,149"/> [\$1,149]
Adj. Reason Code <input type="text" value="Fees"/> <input type="text" value="--- SELECT ---"/>	Adj. Reason Code <input type="text" value="--- SELECT ---"/>
Amount Paid/Verified <input type="text" value="\$0"/>	Amount Paid/Verified <input type="text"/>
Tuition/Fees <input type="text" value="\$2,500"/> [\$2,871]	Tuition/Fees <input type="text"/> [\$2,871]
Federal Aid <input type="text"/> [\$0]	Federal Aid <input type="text"/> [\$0]
Institutional Aid <input type="text"/> [\$0]	Institutional Aid <input type="text"/> [\$0]
State Aid <input type="text"/> [\$0]	State Aid <input type="text"/> [\$0]
Payment Status: Not Reconciled	Payment Status: Not Reconciled

A pop up box will confirm that your transaction has been saved. Once a transaction has been saved, the newly reported data will be reflected the following Wednesday or Monday after CSAC completes the processing of files.

If after saving the transaction, and you would like to delete the submission, you can do so by pulling up the student record again and selecting the "Correction" radio button, then selecting the "Delete" button.

Note: You can delete the transaction prior to processing. The transaction cannot be deleted after it has been processed.

Once a correction has been processed, you can view it under the MCS Student Award Payment History Screen; or the MCS Online Payment Roster screen, click on the “Payment History” link found in the Annual Data section.

The MCS Student Award Payment History screen will provide information on any payments and/or corrections that have been processed for that student at both the annual and term level.

Section 4: MCS Report Download Guidelines

4.1 Introduction:

After the first week of the initial reporting period of the MCS Payment-Correction File, the MCS Roster File Report and the MCS Accept/Reject Report will be available to view and download for each successfully uploaded file. The report provides a summary of the data processed from the MCS Payment-Correction file.

4.2 Downloading the MCS Roster File Report:

On WebGrants, select the Middle Class Scholarship menu option then select MCS – Data Transfer:

The system will display the MCS – Data Transfer Menu screen:



Select the Report Download menu selection.



The system will display the MCS Report Download screen:

MCS - Data Transfer File Upload Report Download

Report Download

- To select a report, choose the file type and click retrieve.
- To download the specific report, click the download button.

School ID Acad Year 2017 - 2018 File Type --- SELECT ---

Month May Media Data File

Enter the **School ID** and select the **File Type** from the drop-down menu. Some users might have the School ID pre-populated based on their user role.

Note: The Academic Year field is defaulted to the current year, the Month field is defaulted to the current month and the Media Type is defaulted to Data File.

Select the **Retrieve** button and select the **OK** button.

If the School ID and File Type are not selected the system will display an exception message:

MCS Application

We noticed the following error(s):

- Please enter school id.
- Please select file type.

OK

If there is no data to report, the system will display an exception message.

MCS - Report Download

No data found

OK

Select the **OK** button. The system will default back to the MCS Report Download screen.

If the Report Download field entries are valid, the system will display the MCS Roster File Report in an embedded panel.

MCS - Data Transfer File Upload Report Download

Report Download

- To select a report, choose the file type and click retrieve.
- To download the specific report, click the download button.

School ID: 00115000 Acad Year: 2017 - 2018 File Type: Roster File Repor
Month: All Media: Data File Retrieve

Report Date	Description	File Type	Month	
10/6/2017	Roster File Data File	Data File	OCT	Download
10/6/2017	Roster File Data File	Data File	OCT	Download
10/6/2017	Roster File Data File	Data File	OCT	Download
10/6/2017	Roster File Data File	Data File	OCT	Download
10/6/2017	Roster File Data File	Data File	OCT	Download

To review the content in the report, select the Download button. The system will display the MCS Roster File Report dialogue box.

Select the **OK** button.

Opening MCRD-2016-00113700-29SEP16-32567.TXT

You have chosen to open:
MCRD-2016-00113700-29SEP16-32567.TXT
which is: TXT file
from: https://webgrants.csac.ca.gov

What should Firefox do with this file?

Open with Notepad++ : a free (GNU) source code editor...
 Save File
 Do this automatically for files like this from now on.

OK Cancel

Example: MCS Admission Process Summary Report

MCS_ADMI	CALIFORNIA STUDENT AID COMMISSION	PAGE: 1
BATCH DATE: 04/24/2017	MCS ADMISSION PROCESS SUMMARY REPORT	RUN DATE: 04/24/2017
	ACADEMIC YEAR 2017	RUN TIME: 17:21:44
File was uploaded on 04/13/2017 by user test123		

Summary Information		

Total Number of Records	Accepted Records	Rejected Records
-----	-----	-----
36239	36239	0

REPORT DEFINITIONS		
Accepted - Passed all valid content tests.		
Rejected - Failed a valid content test.		

Enrollment File Report:

The **Enrollment File Report** is available in both the Data File and Report formats. The report provides a list of students who are ineligible for an MCS award or were rejected from the Enrollment File. The report will only display the most recent transactions that were processed by the Commission during the week.

The **Data File** format will display an error code that begins with an alpha value of "I" for ineligible or "R" for rejected followed by a three-digit code that identifies the error (I002, R020, R031). The student's information is provided after the error codes.

The following codes can be found at the end of this section:

- MCS Enrollment Ineligible & Reject Reason Codes
- MCS Payment Roster Reject Codes and Descriptions

Example: MCS Enrollment Process Eligibility Summary Report (Data File Format)

Report Download

- To select a report, choose the file type and click retrieve.
- To download the specific report, click the download button.

School ID
Acad Year
File Type

Month
Media

Report Date	Description	File Type	Month	
3/30/2018	MCS Enrollment Process Eligibility Summary Data File	Data File	MAR	<input type="button" value="Download"/>
4/6/2018	MCS Enrollment Process Eligibility Summary Data File	Data File	APR	<input type="button" value="Download"/>

The report format will display the data that was uploaded for the student along with the ineligible and rejected codes. A full description of the ineligible and rejected codes is also provided in the report.

MCS	ED	00115000	CSU SACRAMENTO				
I008			123456789	FIRSTN	LASTNAME	L	19930421
R028	I005		789654121	FIRSTN	LASTNAME	L	19940331
I001			456123789	FIRSTN	LASTNAME	H	19961118 001154

Example: MCS Enrollment Process Eligibility Summary Report (Report Format)

MCS ENRL	CALIFORNIA STUDENT AID COMMISSION	PAGE: 1
BATCH DATE: 03/30/2018	MCS ENROLLMENT PROCESS ELIGIBILITY SUMMARY REPORT	RUN DATE: 03/30/2018
	ACADEMIC YEAR 2017	RUN TIME: 20:16:18

File was uploaded on 03/29/2018 by user USER1

00115012017123456789LASTNAME	FIRSTNAME	L1111111111	EMAIL1@csus.edu	42000008297000384500028740000000
I008 Ineligible - Insufficient Remaining Eligibility: .00				
00115012017789654123LASTNAME	FIRSTNAME	L1111111111	EMAIL2222222@csus.edu	42000001656900000000000000000000
R028 Rejected - Non-California Resident: FL				
I005 Ineligible - Incomplete Verification				
00115012017123456987LASTNAME	FIRSTNAME	H1111111111	EMAIL3333333@csus.edu	31000012086500000000000000000000
I001 Pended - Student previously uploaded by another school: 001154				

Summary Information

Total Number of Records	Eligible Records	Rejected Records	Ineligible Records	Pended Records
65	62	1	1	1

REPORT DEFINITIONS

Eligible - Passed all reject and eligibility tests.
 Rejected - Failed a valid content test or a comparison with CSAC data.
 Ineligible - Not rejected, but did not meet eligibility requirements for the MCS award.
 Pended - Eligible, but not the first school to upload an eligible record.

Award Rejects Report:

The **Award Rejects Report** is available in the Report format. The report provides a list of students who are rejected during the award process due to mismatch data between the enrollment information submitted and CSAC's system. The rejected students will continue to appear in the report until their record has been corrected.

The report displays the information provided by the campuses and compares it to the information from CSAC. This allows campuses to view the discrepancy between both entities. The student data from the enrollment file displays on the left side of the report. The data from CSAC displays on the right side of the report.

Fixing the Student Data Discrepancy:

If CSAC has incorrect information for the student, the system can be updated once the student or campus submits proof. A copy of their California Driver's License or Identification Card, and Social Security card must be sent to the Institutional Support Unit, attention to "MCS Processing".

If the student was recently married and the driver's license or identification card does not reflect the new name, a copy of the marriage certificate must be included as well.

If the information in the enrollment record is invalid and CSAC has the correct data, the campus needs to correct it on their end and upload a new enrollment record for the student. Once the record is fixed, the student will be removed from the report and ran through the next MCS award cycle.

Example of Award Rejects Report:

Report Download

- To select a report, choose the file type and click retrieve.
- To download the specific report, click the download button.

School ID Acad Year File Type Month Media Retrieve

Report Date	Description	File Type	Month	
3/2/2018	Award Rejects Report	Report File	MAR	Download

MCS_AWD		CALIFORNIA STUDENT AID COMMISSION				PAGE: 1			
BATCH DATE: 03/02/2018		MCS AWARD REJECTS REPORT				RUN DATE: 03/03/2018			
		ACADEMIC YEAR 2017				RUN TIME: 10:35:16			
		00115000 - CSU SACRAMENTO							
MCS ENROLLMENT DATA:						CSAC DATA:			
SSN	LAST NAME	FIRST NAME	MI	DOB	REJECT REASON	LAST NAME	FIRST NAME	MI	DOB
111111111	LASTNAME	FIRSTNAME	R	19920324	Already exists but with different DOB	LASTNAME	FIRSTNAME		19920624
222222222	LASTNAME	FIRSTNAME		19910212	Already exists but with different DOB	LASTNAME	FIRSTNAME	M	19910112
333333333	LASTNAME	FIRSTNAME		19870110	Already exists but with different first and last name	LASTNAME	FIRSTNAME		19870110
444444444	LASTNAME	FIRSTNAME		19860202	Already exists but with different first and last name	LASTNAME	FIRSTNAME	L	19860202
555555555	LASTNAME	FIRSTNAME		19710119	Already exists but with different DOB	LASTNAME	FIRSTNAME		19710619
666666666	LASTNAME	FIRSTNAME	J	19830829	Already exists but with different DOB	LASTNAME	FIRSTNAME	J	19830819

Accept/Reject Report

The **Accept/Reject Report** is available in the Data File format. The report provides a list of students who had payments or corrections applied during the week. The report is broken down into three sections:

- a) Exception
- b) Rejected
- c) Accepted

Report Download

- To select a report, choose the file type and click retrieve.
- To download the specific report, click the download button.

School ID

Acad Year

File Type

Month

Media

Retrieve

Report Date	Description	File Type	Month	
9/19/2017	Accept/Reject Data File	Data File	SEP	<input type="button" value="Download"/>

The report will display the most recent transactions that have been processed by the Commission.

Example: MCS Accept/Reject Report:

A. Exception Section:

This occurs when the system cannot define the type of transaction being applied to the record because the transaction submitted is invalid or there is no valid transaction for the record in the file. Majority of records under this section are a result from the attempt to apply a payment and correction to the same student within the same file, or an attempt to make annual and term level corrections for the same student.

- For annual level changes, fields 15-40 must be null
- For making term level changes, fields 11-14 must be null

SSN	LAST NAME	FIRST NAME	MI	DOB DATE	TXN TYPE	FILE DATE	USER NAME
121212121	LASTNAME	FIRSTNAME		01/15/1997	C	03/14/2018	username
2: A later record of the same type (payment or correction) was received for this student							
232323232	LASTNAME	FIRSTNAME		04/22/1996	C	03/14/2018	USERNAME
2: A later record of the same type (payment or correction) was received for this student							
454545454	LASTNAME	FIRSTNAME	N	02/13/1997	P	03/16/2018	USERNAME
3: A record can have only one type of transaction (payment or correction)							
787878787	LASTNAME	FIRSTNAME	C	07/07/1995	C	03/15/2018	USERNAME
2: A later record of the same type (payment or correction) was received for this student							
TOTALS							
BATCH -	RECORDS REJECTED:	0					
ONLINE -	RECORDS REJECTED:	4					
COMBINED -	RECORDS REJECTED:	4					

B. Rejected Section:

The payment or correction was rejected because of an edit in place for the transaction. This may be due to the information not being in the correct format when submitted.

SSN	LAST NAME	FIRST NAME	M	PROCESS	TERM	ENROLL	PAY	ADJ	ELIG	TXN
			I	DATE		STATUS	AMOUNT	RSN	CHANGE	TYPE
121212121	LASTNAME	FIRSTNAME	V	03/16/2018	WN	1	690			P
20: Prior term not satisfied										
TOTALS										
BATCH -	TRANSACTIONS REJECTED:		1	AMOUNT REJECTED:		690.00				
ONLINE -	TRANSACTIONS REJECTED:		0	AMOUNT REJECTED:		.00				
COMBINED -	TRANSACTIONS REJECTED:		1	AMOUNT REJECTED:		690.00				
KEY										
ENROLL STATUS CODE			ADJ RSN CODE			ELIG CHANGE CODE				
1	FT (PAY)		1	POST BACC		0	EDUCATIONAL LEVEL CHANGE			
2	LESS THAN HT - (DO NOT PAY)		2	SAP		1	POST BACC			
3	NOT ENROLLED		3	ELIGIBILITY		2	SAP			
4	HT (PAY)		4	FEES		3	ELIGIBILITY			
			5	REFUND/ADJ PAYMENT		4	NOT ENROLLED			
			6	RECERTIFY PAYMENT		5	OTHER			
			7	OTHER		7	OVER ASSET CEILING			
						8	ADD TCP/5TH YR			
						9	REMOVE TCP/5TH YR			

C. Accepted Section:

The payment or correction was accepted and applied to the student's record.

SSN	LAST NAME	FIRST NAME	M I	PROCESS DATE	TERM	ENROLL STATUS	PAY AMOUNT	ADJ RSN	ELIG CHANGE	TXN TYPE	RECERTIFY REQUIRED
121212121	LASTNAME	FIRSTNAME		09/19/2017	AY				3	C	
232323232	LASTNAME	FIRSTNAME	L	09/19/2017	FL			3		C	
454545454	LASTNAME	FIRSTNAME		09/19/2017	SP			3		C	
565656565	LASTNAME	FIRSTNAME		09/19/2017	AY				3	C	
678787878	LASTNAME	FIRSTNAME	A	09/19/2017	AY				3	C	
898989898	LASTNAME	FIRSTNAME	R	09/19/2017	FL			4		C	
747474747	LASTNAME	FIRSTNAME	M	09/19/2017	FL			4		C	
969696969	LASTNAME	FIRSTNAME	I	09/19/2017	AY				3	C	

Payment Activity Report:

The **Payment Activity Report** is available in the Report format. The report provides a summary of payments made to the institutions, reconciled payment transactions, amount of funds disbursed to the institutions, payment transactions, balances along with a summary of the Year-to-Date activity. The report is a cumulative report and displays the weekly activity from the first time a payment was applied through the most current data to date.

School ID	00115000	Acad Year	2017 - 2018	File Type	Payment Activity F
Month	All	Media	Report	Retrieve	

Report Date	Description	File Type	Month	
8/10/2017	Payment Activity Report	Report File	AUG	Download

Example: MCS Payment Activity Report

MCS_RCON	CALIFORNIA STUDENT AID COMMISSION	PAGE:	1	
BATCH DATE: 08/10/2017	MCS PAYMENT ACTIVITY REPORT	RUN DATE:	08/23/2017	
	ACADEMIC YEAR 2017	RUN TIME:	13:04:15	
ACCOUNTING SUMMARY 00115000 - CSU SACRAMENTO				
DATE	ACTIVITY	FUNDS DISBURSED TO INSTITUTION	PAYMENT TRANSACTIONS	BALANCE
08-16-17	RECONCILED PAYMENT TRANSACTIONS		0.00	0.00
08-16-17	PAYMENT TO INSTITUTION	0.00		0.00
08-21-17	RECONCILED PAYMENT TRANSACTIONS		1,149.00	-1,149.00
08-21-17	PAYMENT TO INSTITUTION	1,149.00		0.00
08-22-17	RECONCILED PAYMENT TRANSACTIONS		288.00	-288.00
08-22-17	PAYMENT TO INSTITUTION	288.00		0.00
TOTAL AMOUNT REPORTED TO COMMISSION -		1,437.00		
TOTAL PAYMENTS DISBURSED TO SCHOOL -		1,437.00		
TOTAL BALANCE UP TO DATE -		0.00		
=====				
MCS_RCON	CALIFORNIA STUDENT AID COMMISSION	PAGE:	2	
BATCH DATE: 08/10/2017	MCS RECON BATCH REPORT	RUN DATE:	08/23/2017	
	ACADEMIC YEAR 2017	RUN TIME:	13:04:15	
PAYMENT TRANSACTION SUMMARY 00115000 - CSU SACRAMENTO				
YEAR-TO-DATE ACTIVITY				
	FALL	WINTER	SPRING	TOTAL
PAYMENT AMOUNT	1,149.00	0.00	288.00	1,437.00
TRANSACTION COUNT	2	0	1	3
**** END OF REPORT **** FOR SCHOOL: 00115000 **** CSU SACRAMENTO ****				

MCS CG Sync Report:

The **MCS CG Sync Report** is available in the Report format. The report provides a list of students who went through the MCS/Cal Grant data match process. It displays a summary of the students Cal Grant and MCS awards before and after the data match process ran. An overall summary of the students' eligibility status change is also provided at the end of the report. The report will display the most recent transactions that have been processed by the Commission.

Report Download

- To select a report, choose the file type and click retrieve.
- To download the specific report, click the download button.

School ID	00114700	Acad Year	2017 - 2018	File Type	MCS CG Sync Re
Month	All	Media	Report	Retrieve	

Example: MCS/Cal Grant Processing Report

MCS.CG.S			CALIFORNIA STUDENT AID COMMISSION										PAGE: 1	
BATCH DATE: 12/22/2017			MCS/CAL GRANT PROCESSING REPORT										RUN DATE: 12/23/2017	
			ACADEMIC YEAR 2017										RUN TIME: 00:11:29	
			00114700 - CSU FRESNO											
STUDENT SSN	STUDENT LAST NAME	STUDENT FIRST NAME	CAL GRANT AMTS BEFORE PROCESSING			CAL GRANT AMTS AFTER PROCESSING			MCS AWARD AMTS BEFORE PROCESSING			MCS AWARD AMTS AFTER PROCESSING		
			FL	WN	SP	FL	WN	SP	FL	WN	SP	FL	WN	SP
111111111	LASTNAME	FIRSTNAME	2871	0	2871	470	0	2871	0	0	0	678	0	0
222222222	LASTNAME	FIRSTNAME	0	0	0	2871	0	0	1148	0	1148	0	0	1148
333333333	LASTNAME	FIRSTNAME	2871	0	2871	0	0	0	0	0	0	1148	0	1148
444444444	LASTNAME	FIRSTNAME	3707	0	3707	0	0	0	0	0	0	1148	0	1148
555555555	LASTNAME	FIRSTNAME	0	0	0	718	0	0	1148	0	1148	430	0	1148
666666666	LASTNAME	FIRSTNAME	1436	0	2871	1436	0	0	0	0	0	0	0	1148
777777777	LASTNAME	FIRSTNAME	0	0	0	2871	0	2871	63	0	63	0	0	0
888888888	LASTNAME	FIRSTNAME	0	0	0	2871	0	2871	1149	0	1149	0	0	0
999999999	LASTNAME	FIRSTNAME	0	0	2871	0	0	0	513	0	0	513	0	513
			Payments Set			No Payments Set								
			To Recertify			To Recertify			Total					
Eligible - Award Amount Increased			0			1			1					
Eligible - Award Amount Decreased			0			2			2					
Eligible - Award Amount Unchanged			0			0			0					
Ineligible to Eligible			0			4			4					
Eligible to Ineligible			1			1			2					
Remained Ineligible (not listed above)			0			59			59					
Cal Grant Unchanged (not listed above)			0			0			0					

Total excludes the number of pended records found in the MCS Enrollment Process Eligibility Summary Report.

Student Reconciliation Report:

The **Student Reconciliation Report** is available in the Report and Data file format. The report and file provide a summary of students with reconciled payments to date. Only payments greater than \$0 will appear in the report and file.

Report Download

- To select a report, choose the file type and click retrieve.
- To download the specific report, click the download button.

School ID	<input type="text" value="00115000"/>	Acad Year	<input type="text" value="2017 - 2018"/>	File Type	<input type="text" value="Student Reconcili"/>
Month	<input type="text" value="All"/>	Media	<input type="text" value="Report"/>	<input type="button" value="Retrieve"/>	

Report Date	Description	File Type	Month	
8/10/2017	Student Reconciliation Report	Report File	AUG	<input type="button" value="Download"/>

Example: MCS Student Reconciliation Report

MCS_RCON	CALIFORNIA STUDENT AID COMMISSION	PAGE: 1				
BATCH DATE: 08/10/2017	MCS STUDENT RECONCILIATION REPORT	RUN DATE: 08/23/2017				
	ACADEMIC YEAR 2017	RUN TIME: 16:39:38				
00115000 - CSU SACRAMENTO						
SSN	LAST NAME	FIRST NAME	M	TERM	AMOUNT PAID	PAY DATE
-----	-----	-----	I	----	-----	-----
121212121	LASTNAME	FIRSTNAME	A	FL	1,149.00	08/21/2017
121212121	LASTNAME	FIRSTNAME	A	SP	288.00	08/22/2017

					1,437.00	
YEAR-TO-DATE ACTIVITY						
		FALL		WINTER		SPRING
PAYMENT AMOUNT:		1,149.00		0.00		288.00
GRAND TOTAL:		1,437.00				
NUMBER OF STUDENTS PAID: 1						
**** END OF REPORT **** FOR SCHOOL: 00115000 **** CSU SACRAMENTO ****						

MCS Payment Roster Reject Codes and Description

Codes are produced from the Payment/Correction File upload or manually applied transactions. These appear under the MCS Accept/Reject Report.

REJECT REASON CODE	REJECT DESCRIPTION
1	A record with a different type of transaction (payment or correction) was received first
2	A later record of the same type (payment or correction) was received for this student
3	A record can have only one type of transaction (payment or correction)
4	No valid transaction contained in the record
5	Invalid eligibility change code
6	Invalid transaction type code for eligibility change transaction
7	Invalid transaction type code for enrollment status transaction
8	Invalid transaction type code for adjustment reason transaction
9	No data provided for eligibility change transaction
10	Invalid enrollment status code
11	Invalid school code
12	CSAC is not currently accepting records of this type
13	Student's CSAC ID was not found
14	Student is not on the school's roster
15	Student's award record was not found
16	Invalid payment amount
17	A payment already exists for this term from a different school
18	Term is not open
19	Invalid term for the school
20	Prior term not satisfied
21	Does not exist
22	No data provided for term adjustment transaction
23	Tuition amount is greater than allowed for reported term
24	Invalid Educational Level
25	Education Level transactions are only allowed during student's first year
26	Insufficient remaining eligibility for the selected transaction
27	Invalid TCP/5th Year Flag
28	Student is already in TCP or 5th Year Program
29	Student is not in TCP or 5th Year Program
30	Invalid eligibility change transaction due to an existing payment
31	Campus does not have an eligible 5th Year program

MCS Enrollment Ineligible & Reject Reason Codes

Codes are produced from the Enrollment File uploads and modifications to the MCS Student Enrollment Data screen. The codes appear under the MCS Enrollment Process Eligibility Summary Report including the data file

MCS Ineligible Codes		
REASON CODE	REASON DESCRIPTION	ERROR CODE
1	Pended - Student previously uploaded by another school	I001
2	Ineligible - Total Income Exceeds Limit	I002
3	Ineligible - Citizenship	I003
4	Ineligible - Loan Default (no longer used)	I004
5	Ineligible - Incomplete Verification	I005
6	Ineligible - Student did not meet the deadline date	I006
7	Ineligible - Asset amount exceeds the limit	I007
8	Ineligible - Insufficient Remaining Eligibility	I008
9	Ineligible - Incomplete Prior Year Award	I009

MCS Reject Codes		
REJECT CODE	REJECT DESCRIPTION	ERROR CODE
1	Rejected - School Code does not match value entered on the File Upload screen	R001
2	Rejected - Invalid Term Type	R002
3	Rejected - Academic Year does not match value selected on the File Upload screen	R003
4	Rejected - Invalid SSN/Dream Act ID	R004
5	Rejected - Invalid Last Name	R005
6	Rejected - Invalid First Name	R006
7	Rejected - Invalid Middle Initial	R007
8	Rejected - Invalid Date of Birth	R008
9	Rejected - Invalid Student Status	R009
10	Rejected - Invalid ISIR Transaction Number	R010
11	Rejected - Invalid TCP Flag	R011
12	Rejected - Invalid Campus E-mail Address	R012
13	Rejected - Invalid Grade Level	R013
14	Rejected - Invalid Dependency Status	R014
15	Rejected - Invalid Total Income	R015
16	Rejected - Invalid Federal Award Amount	R016
17	Rejected - Invalid Institutional Grant Amount	R017
18	Rejected - Invalid State Award Amount	R018
19	Rejected - Student's ISIR Transaction Not Found	R019
20	Rejected - Student's Last Name does not match the ISIR value	R020
21	Rejected - Student's First Name does not match the ISIR value	R021
22	Rejected - Student's Middle Initial does not match the ISIR value	R022
23	Rejected - Student's Date of Birth does not match the ISIR value	R023
24	Rejected - Dependency Status does not match the ISIR value	R024
25	Rejected - Total Income does not match the ISIR value	R025
26	Rejected - Student's EFC is Blank	R026
27	Rejected - Student already on school's roster	R027
28	Rejected - Non-California Resident	R028
29	Rejected - Invalid Address - Foreign Country	R029
30	Rejected - Invalid TCP/5th Year Flag	R030
31	Rejected - Student's EL is not consistent with the TCP/5th Year Flag	R031
32	Does not exist	N/A
33	Rejected - Campus does not have an eligible 5th Year program	R033

**ATTACHMENT
PAYMENT AND CORRECTION SCENARIOS**

Scenario	Annual or Term Level Transaction	MCS Online Payment Roster Screen (Manual Process)	Batch – Payment/Correction File (Upload Process)
<p>1. Posting Full-Time Payment</p> <p>-Payment amount must equal the term award amount</p> <p>- A Full-Time payment will use full eligibility for the term: Semester = 50.00% Quarter = 33.33%</p>	<p>Term</p>	<ul style="list-style-type: none"> • Select Payment radio button • Select “FT-(Pay)” from the Enrollment Status drop down field • The Amount Paid/Verified field is automatically populated with the term award amount • Hit the Save button <p><u>Results:</u> The update to the record will be available the following Wednesday or Monday. The payment will show as applied and the Payment Status for the term will show as Reconciled.</p>	<ul style="list-style-type: none"> • Fields 15/16/17 (Student’s Fall/Winter/Spring Enrollment Status) – Enter 1 for FT-(Pay) • Fields 21/28/35 (Fall/Winter/Spring MCS Award Payment) – Enter the term award amount • Field 42 (Transaction Type) – Enter P for “Payment Information” <p><u>Results:</u> The update to the record will be available the following Wednesday or Monday. The payment will show as applied and the Payment Status for the term will show as Reconciled.</p>

<p>2. Posting Half-Time Payment</p> <p>-Payment amount must equal the term award amount</p> <p>- A Half-Time payment will use half eligibility for the term: Semester = 25.00% Quarter = 16.66%</p> <p><i>If the term award amount should be a lower amount, the campus should reduce the Tuition/Fees prior to applying the payment. If the fees are not reduced, the student will get paid at the full term award amount in place and the payment will use half of the eligibility.</i></p>	<p>Term</p>	<ul style="list-style-type: none"> • Select Payment radio button • Select “HT-(Pay)” from the Enrollment Status drop down field • The Amount Paid/Verified field is automatically populated with the term award amount • Hit the Save button <p><u>Results:</u> The update to the record will be available the following Wednesday or Monday. The payment will show as applied and the Payment Status for the term will show as Reconciled.</p>	<ul style="list-style-type: none"> • Fields 15/16/17 (Student’s Fall/Winter/Spring Enrollment Status) – Enter 4 for HT-(Pay) • Fields 21/28/35 (Fall/Winter/Spring MCS Award Payment) – Enter the term award amount • Field 42 (Transaction Type) – Enter P for “Payment Information” <p><u>Results:</u> The update to the record will be available the following Wednesday or Monday. The payment will show as applied and the Payment Status for the term will show as Reconciled.</p>
--	-------------	---	---

<p>3. Posting a Zero (\$0) Payment</p> <p>-Less Than HT – (Do Not Pay) Or -Not Enrolled payment type</p> <p>- A zero payment will not use any eligibility for the term or reduce the student's term award amount to zero.</p>	<p>Term</p>	<ul style="list-style-type: none"> • Select Payment radio button • Select “Less Than HT – (Do Not Pay)” or “Not Enrolled” from the Enrollment Status drop down field • The Amount Paid/Verified field is automatically populated with a \$0 payment amount • Hit the Save button <p><u>Results:</u> The update to the record will be available the following Wednesday or Monday. The payment will show as applied with a \$0 amount and the Payment Status for the term will show as Reconciled.</p>	<ul style="list-style-type: none"> • Fields 15/16/17 (Student's Fall/Winter/Spring Enrollment Status) – Enter “2” for Less Than HT – (Do Not Pay) or “3” for Not Enrolled • Fields 21/28/35 (Fall/Winter/Spring MCS Award Payment) – Enter a \$0 dollar amount • Field 42 (Transaction Type) – Enter P for “Payment Information” <p><u>Results:</u> The update to the record will be available the following Wednesday or Monday. The payment will show as applied with a \$0 amount and the Payment Status for the term will show as Reconciled.</p>
--	-------------	---	--

<p>4. Posting Refund/Adjusted Payment</p> <p>-This option allows campuses to post a payment that is less than the term award amount.</p> <p>-This option can also be used to post a \$0 payment.</p> <p>- A payment greater than \$0, will use full eligibility for the term: Semester = 50% Quarter = 33.33%</p> <p>- A zero payment will not use any eligibility for the term or reduce the student's term award amount to zero.</p>	<p>Term</p>	<ul style="list-style-type: none"> • Select Payment radio button • Select "Refund/Adjusted Payment" from the Adj. Reason Code drop down field • The Amount Paid/Verified field opens up for the campus to input the payment amount • Hit the Save button <p><u>Results:</u> The update to the record will be available the following Wednesday or Monday. The payment will show as applied and the Payment Status for the term will show as Reconciled.</p>	<ul style="list-style-type: none"> • Fields 21/28/35 (Fall/Winter/Spring MCS Award Payment) – Enter the dollar amount • Fields 22/29/36 (Fall/Winter/Spring Adjustment Reason Code) – Enter 5 for Refund/Adjusted Payment • Field 42 (Transaction Type) – Enter P for "Payment Information" <p><u>Results:</u> The update to the record will be available the following Wednesday or Monday. The payment will show as applied and the Payment Status for the term will show as Reconciled.</p>

<p>5. Student's Total Income has increased or decreased*</p> <p><i>*Multiple annual level changes can be made in the same week. For example, the Total Income and all three annual aid amounts can be updated and submitted as one transaction. These changes are considered annual level changes and use the "Correction" transaction type.</i></p>	<p>Annual</p>	<ul style="list-style-type: none"> • Select Correction radio button • Select "Eligibility" from the Eligibility Change drop down field in the Annual Data section • Enter new income amount in the Total Income field • Hit the Save button <p><u>Results:</u> The student's MCS award will be recalculated using the new income amount. The update to the MCS award information will be available the following Wednesday or Monday. The student's new award may be higher, lower or zero based on the new income amount provided.</p> <p>NOTE 1: The change may also result in having payments in a recertify status if the record has reconciled payments in place.</p> <p>NOTE 2: If the new income exceeds the max income level for the year, the student will be removed from the campus roster.</p>	<ul style="list-style-type: none"> • Field 11 (Total Income) – Enter new total income • Field 41 (Eligibility Change) – Enter 3 for Eligibility • Field 42 (Transaction Type) – Enter C for "Correction" <p><u>Results:</u> The student's MCS award will be recalculated using the new income amount. The update to the MCS award information will be available the following Wednesday or Monday. The student's new award may be higher, lower or zero based on the new income amount provided.</p> <p>NOTE 1: The change may also result in having payments in a recertify status if the record has reconciled payments in place.</p> <p>NOTE 2: If the new income exceeds the max income level for the year, the student will be removed from the campus roster.</p>
---	---------------	--	--

<p>6. Student’s annual aid has increased or decreased</p> <p><u>Annual aid consists of:</u></p> <ul style="list-style-type: none"> • Federal Aid • Institutional Aid • State Aid <p><i>*Do not include Cal Grant awards as part of the annual aid. If the student has an existing Cal Grant, CSAC’s system will factor it in when it recalculates.</i></p> <p><i>*Multiple annual level changes can be made in the same week. For example, the Total Income and all three annual aid amounts can be updated and submitted as one transaction. These changes are considered annual level changes and use the “Correction” transaction type.</i></p>	<p>Annual</p>	<ul style="list-style-type: none"> • Select Correction radio button • Select “Eligibility” from the Eligibility Change drop down field • Enter new annual aid into one of the fields: Federal Aid, Institutional Aid, State Aid • Hit the Save button <p><u>Results:</u> The student’s MCS award will be recalculated using the new amount(s) entered. The update to the MCS award information will be available the following Wednesday or Monday. The student’s new award may be higher, lower or zero based on the new amount(s) provided.</p> <p>NOTE: The change may also result in having payments in a recertify status if the record has reconciled payments in place. If so, see Scenario 11 to recertify the payment(s).</p>	<ul style="list-style-type: none"> • Field 12 (Student’s Federal Aid) – Enter new annual Pell Grant amount • Field 13 (Student’s Institutional Grants and Fee Waivers) – Enter new Institutional Aid amount • Field 14 (Student’s State Aid) – Enter new State Aid amount • Field 41 (Eligibility Change) – Enter 3 for Eligibility • Field 42 (Transaction Type) – Enter C for “Correction” <p><u>Results:</u> The student’s MCS award will be recalculated using the new amount(s) entered. The update to the MCS award information will be available the following Wednesday or Monday. The student’s new award may be higher, lower or zero based on the new amount(s) provided.</p> <p>NOTE: The change may also result in having payments in a recertify status if the record has reconciled payments in place. If so, see Scenario 11 to recertify the payment(s).</p>
--	---------------	---	---

<p>7. Student is not eligible for MCS</p> <p><u>Ineligible reasons consist of:</u></p> <ul style="list-style-type: none"> • Post Bacc • SAP • Not Enrolled • Other • Over Asset Ceiling <p>-These selections will withdraw the student from the roster.</p> <p><i>NOTE:</i> <i>Students may have existing reconciled payments. If the payment information needs to be removed; the payments must be taken care of first before applying the ineligible status.</i></p>	<p>Annual</p>	<ul style="list-style-type: none"> • Select Correction radio button • Select one of the ineligible reasons from the Eligibility Change drop down field • Hit the Save button <p><u>Results:</u> Student will be withdrawn from the MCS program and removed from the campus roster the following Wednesday or Monday.</p> <p>If the student has existing reconciled payments, the transaction will be rejected.</p>	<ul style="list-style-type: none"> • Field 41 (Eligibility Change) – Enter 1-Post Bacc, 2-SAP, 4-Not Enrolled, 5-Other or 7-Over Asset Ceiling • Field 42 (Transaction Type) – Enter C for “Correction” • <i>If a payment exists for either term; make sure to remove the information from the following fields of the payment file:*</i> <ul style="list-style-type: none"> ○ <i>Students’ Enrollment Status (Fields 15, 16, 17)</i> ○ <i>MCS Award Payment (Fields 21, 28, 35)</i> <p><i>*If the payments are not removed from the file for either term, the system will assume you are attempting to make both a payment and a correction for the same student record. This will result with the transaction rejecting and the campus will need to submit it again the following week.</i></p> <p><u>Results:</u> Student will be withdrawn from the MCS program and removed from the campus roster the following Wednesday or Monday.</p> <p>If the student has existing reconciled payments, the transaction will be rejected.</p>
---	---------------	---	---

<p>8. School Change /Transfer Students</p> <p>There is no mechanism in place to do a school change. A data maintenance fix will need to be completed by CSAC. Campus A or B must contact CSAC's Institutional Support Unit regarding the request for the transfer.</p> <p>NOTE: If CSAC determines the transfer to Campus B will not grant the student an award, the transfer request will not move forward. The student will remain on Campus A roster the remainder of the year. The campus can apply a payment of Not Enrolled to the remaining term(s).</p>	<p>Annual and Enrollment File</p>	<p><u>Campus A:</u></p> <p><u>Spring Transfer Student:</u> Campus must apply a payment to the Fall payment if a semester campus.</p> <p>If a quarter campus, apply payments to the Fall and Winter terms.</p> <p><u>Winter Transfer Student:</u> Campus must apply a payment to the Fall term.</p> <p>See Scenarios 1-4 for payment types.</p> <p><u>Campus B:</u> Must submit an Enrollment record with the Student Status field designated as a Winter or Spring Transfer. The enrollment record can be submitted at any time using the Student Enrollment data screen.*</p> <p><u>Results:</u> After the data maintenance has been completed, the student will be awarded under Campus B. The student will appear on Campus B roster. Campus B will only see the Winter and/or Spring terms on their roster, not the Fall or Winter term. Campus A will no longer have the student on their roster, but will still be able to see the Fall and/or Winter payment(s) under the Student Reconciliation Report and the Payment History screen.</p> <p><i>*Submitting a manual enrollment record is not currently available. The function should be available at the beginning of AY 2018-19.</i></p>	<p><u>Campus A:</u></p> <p><u>Spring Transfer Student:</u> Campus must apply a payment to the Fall payment if a semester campus:</p> <p>If a quarter campus, apply payments to the Fall and Winter terms.</p> <p><u>Winter Transfer Student:</u> Campus must apply a payment to the Fall term.</p> <p>See Scenarios 1-4 for payment types.</p> <p><u>Campus B</u> Must submit Enrollment File with Field 9 specifying the student's term transfer type; Winter or Spring transfer. Fields 1-18 of the enrollment file must also be completed.</p> <ul style="list-style-type: none"> Field 9 (Student's Status) of the Enrollment File – Submit a 3 for Winter Transfer or 4 for Spring Transfer <p><u>Results:</u> After the data maintenance has been completed, the student will be awarded under Campus B. The student will appear on Campus B roster. Campus B will only see the Winter and/or Spring terms on their roster, not the Fall or Winter term. Campus A will no longer have the student on their roster, but will still be able to see the Fall and/or Winter payment(s) under the Student Reconciliation Report and the Payment History screen.</p>
--	-----------------------------------	--	--

<p>9. Student's Tuition/Fees has decreased for the term</p> <p>The change may also result in having payments in a recertify status if the record has reconciled payments in place. If so, see Scenario 11 to recertify the payment(s).</p>	<p>Term</p>	<ul style="list-style-type: none"> • Select Correction radio button • Fall/Winter/Spring Term(s) = <p>Select "Fees" on Adj. Reason Code drop down field and enter the new Tuition/Fees amount</p> <ul style="list-style-type: none"> • Hit the Save button <p><u>Results:</u> The student's term(s) will be recalculated using the new Tuition/Fees amount. The update to the MCS award information will be available the following Wednesday or Monday. The student's new term award will be lower or zero based on the new Tuition/Fees amount(s) provided.</p> <p><i>NOTE:</i> Only the term that had a change to their Tuition/Fee will be recalculated.</p> <p><i>i.e. If the Winter term had a change to the Tuition/Fee, only the Winter term will be recalculated, not the Fall or Spring terms.</i></p>	<ul style="list-style-type: none"> • Field 22/29/36 (Fall/Winter/Spring Adjustment Reason Code) – Enter 4 for Fees • Field 23/30/37 (Fall/Winter/Spring Tuition/Fee) – Enter new tuition value • Field 41 (Eligibility Change) – Leave blank • Field 42 (Transaction Type) – Enter C for "Correction" <p><u>Results:</u> The student's term(s) will be recalculated using the new Tuition/Fees amount. The update to the MCS award information will be available the following Wednesday or Monday. The student's new term award will be lower or zero based on the new Tuition/Fees amount(s) provided.</p> <p><i>NOTE:</i> Only the term that had a change to their Tuition/Fee will be recalculated.</p> <p><i>i.e. If the Winter term had a change to the Tuition/Fee, only the Winter term will be recalculated, not the Fall or Spring terms.</i></p>
---	-------------	--	--

<p>10. Student's other aid has increased or decreased for the term</p> <p><u>Other aid consists of:</u></p> <ul style="list-style-type: none"> • Federal Aid • Institutional Aid • State Aid <p>The change may also result in having payments in a recertify status if the record has reconciled payments in place. If so, see Scenario 11 to recertify the payment(s).</p>	<p>Term</p>	<ul style="list-style-type: none"> • Select Correction radio button • Fall/Winter/Spring Term(s) = <p>Select "Eligibility" on Adj. Reason Code drop down field and enter in the new aid amount into one of the following fields: Federal Aid, Institutional Aid, State Aid</p> <ul style="list-style-type: none"> • Hit the Save button <p><u>Results:</u> The student's term(s) will be recalculated with new aid amounts provided. The update to the MCS award information will be available the following Wednesday or Monday. The student's new term award may be higher, lower or zero based on the amount(s) entered.</p> <p><i>NOTE:</i> Only the term that had a change to their other aid will be recalculated.</p> <p><i>i.e. If the Spring term had a change to their Federal Aid, only the Spring term will be recalculated, not the Fall or Winter terms.</i></p>	<ul style="list-style-type: none"> • Field 22/29/36 (Fall/Winter/Spring Adjustment Reason Code) – Enter 3 for Eligibility • Field 24/31/38 (Fall/Winter/Spring Federal Aid) – Enter new value • Field 25/32/39 (Fall/Winter/Spring Institutional Aid Amount) – Enter new value • Field 26/33/40 (Fall/Winter/Spring State Aid Amount) – Enter new value • Field 42 (Transaction Type) – Enter C for "Correction" • <i>If a payment exists for either term; make sure to remove the information from the following fields of the payment file:*</i> <ul style="list-style-type: none"> ○ Students' Enrollment Status (Fields 15, 16, 17) ○ MCS Award Payment (Fields 21, 28, 35) <p><i>* If the payments are not removed from the file for either term, the system will assume you are attempting to make both a payment and a correction for the same student record. This will result with the transaction rejecting and the campus will need to submit it again the following week.</i></p> <p><u>Results:</u> The student's term(s) will be recalculated with new aid amounts provided. The update to the MCS award information will be available the following Wednesday or Monday. The student's new term award may be higher, lower or zero based on the amount(s) entered.</p> <p><i>NOTE:</i> Only the term that had a change to their other aid will be recalculated.</p> <p><i>i.e. If the Spring term had a change to their Federal Aid, only the Spring term will be recalculated, not the Fall or Winter terms.</i></p>
---	-------------	--	--

<p>11. Recertifying a Payment</p> <p>To recertify means the campus needs to go in and verify the new payment amount. Recertify happens when the student was previously paid for the term(s) and a correction was applied at the annual or term level. The correction caused the award to be recalculated and alters the payment amount that was in place due to the new award amount.</p> <p><u>NOTE:</u> <i>You cannot recertify and apply a payment to the same student in one transaction. The recertify payment must be completed first. The following week, the standard payment(s) can be applied using the Enrollment Status or Refund/Adjusted Payment functions.</i></p>	<p>Term</p>	<p>There are two options available to recertify a payment:</p> <p><u>Option 1 – Using Enrollment Status Function</u></p> <ul style="list-style-type: none"> • Select Payment radio button • Select “FT-(Pay)” or “HT-(Pay)” from the Enrollment Status drop down field • The Amount Paid/Verified field is automatically populated with the new term award amount • Hit the Save button <p><u>Option 2 - Using Refund/Adjusted Payment Function</u></p> <ul style="list-style-type: none"> • Select “Payment” radio button • Select Refund/Adjusted Payment from the Adj. Reason Code drop down field • Enter the new payment amount in the Amount/Paid Verified field. The amount entered should be less than the Term Award Amount. • Hit the Save button <p><u>Results:</u> The update to the record will be available the following Wednesday or Monday. The payment will show as applied and the Payment Status for the term will show as Reconciled. The “Recertify Payment” status will no longer be visible under the “Adj. Reason Code” field.</p>	<p>There are two options available to recertify a payment:</p> <p><u>Option 1 – Using Enrollment Status Function</u></p> <ul style="list-style-type: none"> • Fields 15/16/17 (Student’s Fall/Winter/Spring Enrollment Status) – Enter 1 for FT-(Pay) or 4 for HT-(Pay) • Fields 21/28/35 (Fall/Winter/Spring MCS Award Payment) – Enter the term award amount • Field 42 (Transaction Type) – Enter P for “Payment Information” <p><u>Option 2 - Using Refund/Adjusted Payment Function</u></p> <ul style="list-style-type: none"> • Field 21/28/35 (Fall/Winter/Spring MCS Award Payment) - Enter the dollar amount • Field 22/29/36 (Fall/Winter/Spring Adjustment Reason Code) – Enter 5 for Refund/Adjusted Payment • Field 42 (Transaction Type) – Enter P for “Payment Information” <p><u>Results:</u> The update to the record will be available the following Wednesday or Monday. The payment will show as applied and the Payment Status for the term will show as Reconciled. The “Recertify Payment” code of 6 will no longer appear in Field 22/29/36 of the payment file.</p>
--	-------------	---	--

<p>12. Educational Level Changes</p> <p>-Educational Level (EL) changes are only allowed during the academic year in which the student's MCS eligibility percentage was established. This function only allows EL changes between 0 – 4.</p> <p>-EL changes to a 5 are only allowed if the student is in a 5th Year or Teacher Credential Program. This functionality is completed by using the "Add TCP/5th Year" transaction.</p> <p><i>To add a TCP/5th Year program flag, go to Scenario #13.</i></p>	<p>Annual</p>	<ul style="list-style-type: none"> • Select "Correction" radio button • Select "Educational Level" from the Eligibility Change drop down field located in the Annual Data section • The "Educational Level" field opens up; select new educational level between 0-4 • Hit the Save button <p><u>Results:</u> The student's Educational Level change will be updated and available the following Wednesday or Monday.</p>	<ul style="list-style-type: none"> • Field 41 (Eligibility Change) – Enter 0 for Educational Level Change • Field 42 (Transaction Type) – Enter C for "Correction" • Field 46 (Educational Level) – Enter a value between 0 – 4 <p><u>Results:</u> The student's Educational Level change will be updated and available the following Wednesday or Monday.</p>
---	---------------	---	---

<p>13. Adding the 5th Year and/or Teacher Credential Program (TCP) Flag</p> <p>The change may also result in having payments in a recertify status if the record has reconciled payments in place. If so, see Scenario 11 to recertify the payment(s).</p> <p><u>NOTE:</u> Mid-year TCP's is not an available function. The TCP must be added at the annual level.</p> <p>For CSU campuses, after the TCP has been applied, the Fall term Tuition/Fee must be adjusted to reduce it down to the regular Tuition/Fee amount.</p> <p><u>5th Year Program:</u> If the campus does not have an eligible program, the transaction will be rejected.</p>	<p>Annual</p>	<ul style="list-style-type: none"> • Select Correction radio button • Select “Add TCP/5th Year” on Eligibility Change drop down field located in the Annual Data section • The “TCP or 5th Year” field opens; select either Add TCP or Add 5th Year • Hit the Save button <p><u>NOTE:</u> CSAC will recalculate the student’s award using the stored amounts for the program and segment type.</p> <p><u>If TCP selected:</u> -For CSU campuses, the student’s annual award amount will calculate to a higher total. -For UC campuses, the annual award amount should remain the same since the TCP amount is the same as their standard Tuition/Fees.</p> <p><u>-If 5th Year selected:</u> The student’s annual award amount will recalculate using the standard Tuition/Fees for the segment type.</p> <p><u>Results:</u> The update to the MCS award information will be available the following Wednesday or Monday.</p>	<ul style="list-style-type: none"> • Field 41 (Eligibility Change) – Enter 8 for “Add Teacher Credential Program Flag (TCP) / 5th-Yr Program Flag” • Field 42 (Transaction Type) – Enter C for “Correction” • Field 43 (Teacher Credential Program (TCP) / Fifth Year of 5-Year Program Flag) – Enter 1 for “Yes – TCP” or 3 for “Yes – 5th-Yr” <p><u>NOTE:</u> CSAC will recalculate the student’s award using the stored amounts for the program and segment type.</p> <p><u>If TCP selected:</u> -For CSU campuses, the student’s annual award amount will calculate to a higher total. -For UC campuses, the annual award amount should remain the same since the TCP amount is the same as their standard Tuition/Fees.</p> <p><u>-If 5th Year selected:</u> The student’s annual award amount will recalculate using the standard Tuition/Fees for the segment type.</p> <p><u>Results:</u> The update to the MCS award information will be available the following Wednesday or Monday.</p>
---	---------------	---	---

<p>14. Removing the 5th Year and/or Teacher Credential Program (TCP) Flag</p>	<p>Annual</p>	<ul style="list-style-type: none"> • Select Correction radio button • Select “Remove TCP/5th Year” on Eligibility Change drop down field in the Annual Data section • Hit the Save button <p><i>NOTE:</i> CSAC will recalculate the student’s award amount at the annual level using the standard Tuition/Fees amount for the segment type.</p> <p><u>Results:</u> The update to the MCS award information will be available the following Wednesday or Monday. For CSU campuses, the student’s annual award amount will calculate to a lower total. For UC campuses, the annual award amount should remain the same since the TCP amount is the same as their Tuition/Fees.</p>	<ul style="list-style-type: none"> • Field 41 (Eligibility Change) – Enter 9 for “Remove TCP/5th-Yr Program” • Field 42 (Transaction Type) – Enter C for “Correction” • Field 43 (Teacher Credential Program (TCP) / Fifth Year of 5-Year Program Flag) – Enter 2 for “No – TCP/5th-Yr” <p><i>NOTE:</i> CSAC will recalculate the student’s award amount at the annual level using the standard Tuition/Fees amount for the segment type.</p> <p><u>Results:</u> The update to the MCS award information will be available the following Wednesday or Monday. For CSU campuses, the student’s annual award amount will calculate to a lower total. For UC campuses, the annual award amount should remain the same since the TCP amount is the same as their Tuition/Fees.</p>
---	---------------	---	--

<p>15. Applying an Ineligible Status to a Term</p> <p><u>Ineligible term reasons consist of:</u></p> <ul style="list-style-type: none"> • Post Bacc • SAP • Other <p>NOTE: CSAC recommends using the transaction for one term and do not apply it across the board (all terms). If the student is ineligible for the entire year, use the annual level transaction to withdraw the student from the roster (see Scenario 7).</p>	<p>Term</p>	<ul style="list-style-type: none"> • Select “Payment” radio button • At the Fall/Winter/Spring term level, select either “Post Bacc, SAP, or Other” from the Adj. Reason Code drop down menu • The Amount/Paid Verified field will automatically populate with a \$0 payment amount • Hit the Save button <p><u>Results:</u> The update to the MCS award information will be available the following Wednesday or Monday. The Term Award Amount will be reduced to zero. All other amounts related to the term will remain (Tuition/Fees, Federal Aid, Institutional Aid, and State Aid). The term will show as a reconciled payment along with the type of ineligible status applied. The status will display below the Adj. Reason Code field.</p> <p>The Adj. Reason Code field will continue to display the ineligible status code until the term is reinstated and a payment is applied.</p> <p><i>NOTE:</i> <i>If a reconciled payment exists, the payment will be reversed out from the term. The payment amount will also be reversed from the overall campus balance. The amount that was reversed can be viewed under the MCS Payment Activity Report.</i></p>	<ul style="list-style-type: none"> • Field 21/28/35 (Fall/Winter/Spring MCS Award Payment) – Enter a \$0 dollar amount • Field 22/29/36 (Fall/Winter/Spring Adjustment Reason Code) – Enter 1-Post Bacc, 2-SAP or 7-Other • Field 42 (Transaction Type) – Enter P for “Payment Information” <p><u>Results:</u> The update to the MCS award information will be available the following Wednesday or Monday. The Term Award Amount will be reduced to zero. All other amounts related to the term will remain (Tuition/Fees, Federal Aid, Institutional Aid, and State Aid). The term will show as a reconciled payment along with the type of ineligible status applied. The status will display below the Adj. Reason Code field.</p> <p>Fields 22/29/36 will continue to display the ineligible status code until the term is reinstated and a payment is applied.</p> <p><i>NOTE:</i> <i>If a reconciled payment exists, the payment will be reversed out from the term. The payment amount will also be reversed from the overall campus balance. The amount that was reversed can be viewed under the MCS Payment Activity Report.</i></p>
---	-------------	---	---

<p>16. Reinstating an Ineligible Term</p> <p>-This function will remove the ineligible status of Post Bacc, SAP or Other</p>	<p>Term</p>	<ul style="list-style-type: none"> • Select “Correction” radio button • At the Fall/Winter/Spring term level, select “Fees” from the Adj. Reason Code drop down menu • Enter the campus tuition amount for the term in the Tuition/Fees field, even if the field displays an amount in the red bracket • Hit the Save button <p><i>NOTE:</i> Reinstating the term requires the campus to enter the Tuition/Fee amount. If the student has other aid related to the term, those amounts can also be entered during this time.</p> <ul style="list-style-type: none"> ▪ Federal Aid, Institutional Aid and State Aid <p><u>Results:</u> The update to the MCS award information will be available the following Wednesday or Monday. The term will be recalculated based on the Tuition/Fee and any other aid amounts entered. The term will continue to display as a reconciled payment.</p> <p>The ineligible status will continue to display below the Adj. Reason Code field until a payment is applied to the term.</p>	<ul style="list-style-type: none"> • Field 22/29/36 (Fall/Winter/Spring Adjustment Reason Code) – Enter 4 for “Fees” • Field 23/30/37 (Fall/Winter/Spring Tuition/Fee Amount) – Enter the Tuition/Fee amount for the term • Field 42 (Transaction Type) – Enter C for “Correction” <p><i>NOTE:</i> Reinstating the term requires the user to enter the Tuition/Fee amount. If the student has other aid related to the term, those amounts can also be entered during this time in the following fields:</p> <ul style="list-style-type: none"> ▪ Field 24/31/38 (Fall/Winter/Spring Federal Aid Amount) ▪ Field 25/32/39 (Fall/Winter/Spring Institutional Aid Amount) ▪ Field 26/33/40 (Fall/Winter/Spring State Aid Amount); Exclude Cal Grant <p><u>Results:</u> The update to the MCS award information will be available the following Wednesday or Monday. The term will be recalculated based on the Tuition/Fee and any other aid amounts entered. The term will continue to display as a reconciled payment.</p> <p>Fields 22/29/36 will continue to display the ineligible status code until a payment is applied to the term.</p>
---	-------------	--	--

Reference Information

For more information visit the Middle Class Scholarship Information webpage on the California Student Aid Commission webpage at <http://www.csac.ca.gov/post/middle-class-scholarship-0>.