California Student Aid Commission

Cal Grant Overview
Making education beyond high school financially accessible to all Californians.
Making education beyond high school financially accessible to all Californians.
Application Deadlines

**March 2nd**

- Students attending any Cal Grant Eligible School can apply
- Cal Grant A, B, and C awards granted
- Entitlement & Competitive awards

**September 2nd**

- Students enrolled at a CCC
- Cal Grant A and B
- Competitive awards only
  - **NEW in 2019-20:** CADAA applicants are now eligible
  - Exception: Foster youth who qualify for Cal Grant B are *Entitlement* applicants
Grade Point Averages (GPAs)

GPAs are submitted to the Commission by high schools and colleges

- High School GPA
- Reestablished Community College GPA
- College GPA

SAT, ACT, GED, TASC, HiSET allowed if:

- Student does not have a GPA
- Coursework cannot be converted to a 4.00
- Attended a non-accredited high school

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GPA Unit Requirements

Reestablished GPA:
- 16 – 23 semester units
- 24 – 35 quarter units
- Valid for Competitive Grant B only

Regular GPA:
- 24+ semester units
- 36+ quarter units

If unable to calculate GPA due to too few units, refer student to last school of attendance with the most completed units.

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GPA Submission Options

High School GPA
- Used for High School Entitlement awards
- Colleges can submit a HS GPA if they obtain HS transcripts and student is within 1 year of HS graduation

2019-20 Student Late GPA Appeal (G-17)
- Entitlement: Deadline May 16, 2019
- Competitive Cycles:
  - March 2: Deadline March 22, 2019
  - September 2: Deadline September 22, 2019

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Basic Eligibility Requirements

*US Citizen, Eligible Non-citizen
*CA resident
*SSN
Maintain SAP
Not Earned a BA
Not Incarcerated
Attend Cal Grant Eligible College
GPA
Meet Selective Service
Not Default on Title IV Student Loan
Enrolled at least half time
Not owe a refund of any Title IV grant or state grant

(*Requirements are supplanted by other eligibility criteria for AB 540/AB 200/SB 68 students)

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California Residency

- CSAC makes initial determination based on FAFSA/CADAA
- Institutions make final residency determination

<table>
<thead>
<tr>
<th>Married or 18+</th>
<th>Under 18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Based on their own CA residency status</td>
<td>Based on residency of their parents</td>
</tr>
</tbody>
</table>

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Question: If a student meets residency requirements mid-year, is that student still eligible for a Cal Grant that award year?

Answer: Yes; that student would just need to post a Leave of Absence (LA) for ineligible terms prior to the determined residency date.
Citizenship Requirements

Must be a U.S citizen

Eligible non-citizen

- U.S Permanent Resident (I-551)
- Conditional Permanent Resident (I-551C)
- USCIS Arrival-Departure Record (I-94)

- “Refugee”
- “Asylum-Granted”
- “Cuban-Haitian Entrant”
- Battered Immigrant-Qualified Alien

- Victims of human trafficking
- T-Visa holder
- U-Visa holder
- “Parolee” for at least 1 year with intent to become U.S citizen/Permanent Resident

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Incarcerated Students

Not eligible for Cal Grant benefits

Can apply for Cal Grant if they will be able to accept award upon release

Not considered incarcerated if:
- In a half-way house
- While on home detention
- Sentenced to serve only weekends

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Defaults/Overpayments

To be eligible for a Cal Grant, a student must:
- Not be in default on a Title IV student loan
- Not owe a Title IV or state grant overpayment

To regain eligibility, a student must:
- Contact their financial aid office for additional information
- Repay full amount or be making acceptable payments
Satisfactory Academic Progress

The Commission follows federal Title IV SAP requirements

Institution’s SAP policy must include these elements:

- Qualitative component (GPA)
- Quantitative component (Pace)
- Maximum time-frame (150% of normal program length)
- Incremental measurement (how often is SAP checked)
- Appeal process
- Procedures for re-establishing SAP eligibility

Schools must check SAP before disbursing funds

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Satisfactory Academic Progress

Retain the following documentation:

- SAP Policy
- Transcripts
- SAP Letters

Ensure that your institution is:

- Implementing your SAP policy
- Monitoring students for SAP
- Notifying students not meeting SAP

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Satisfactory Academic Progress

Sample Institutional SAP Policy:

• Students must obtain a GPA of 2.0 or higher and successfully complete at least 75% of their units attempted

• SAP measurement is determined at the end of each term

• Students who do not meet SAP will be placed on Financial Aid Warning for the following semester and can receive financial aid

• Students who fail to meet SAP during the warning term will be placed on Financial Aid Suspension and will not receive financial aid

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SAP Scenario

At the end of the Fall term, student obtains a cumulative GPA of 1.80

Based on this information, what should the institution do?

• Place the student on Financial Aid Warning and provide a warning letter to the student, prior to the start of the Spring term
• Retain letter in student file (paper or electronic)
At the end of the Spring term, the student fails to meet SAP again. What should the institution do next?

Place student on Financial Aid Suspension; Report ‘NP’ in WebGrants; after 3 consecutive terms student Cal Grant will be withdrawn

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Bachelor Degree Holders

Ineligible for Cal Grant
- Includes: Bachelor degree holders from foreign or unaccredited schools

Exception
- Teaching Credential Programs
- Mandatory 5th year programs
Consortium Agreements

- A contractual agreement between affiliated schools
- Specifies which institution will have financial aid responsibility
- Allows eligibility based on total units
- Authorized under federal regulations contained in 34 CFR Section 600.9

For more information refer to the federal Student Financial Aid Handbook

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Study Abroad

• Cal Grant payments are allowed if a formal agreement exists

• Home campus charges tuition and fees, verifies financial aid eligibility, and posts payments

• Students should not assume eligibility

• Cost of attendance is not automatically updated

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Distance Learning

Distance Learning may be referred to as Online Education

Cal Grant payments are allowed, if all of the following are true:

- The campus where student is enrolled is a Cal Grant eligible institution and is located in California

- All other Cal Grant eligibility requirements are met

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Financial Need Calculation

Cost of Attendance (COA) – Expected Family Contribution (EFC)

Unmet Financial Need

• **Cal Grant A** Financial Need Maximum Cal Grant A Award amount + $1,500

• **Cal Grant B** Financial Need of at least $700

• **Cal Grant C** Financial Need Maximum Cal Grant C award amount + $1,500

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Student Expense Budget

- Adjusted annually using the California Consumer Price Indices

- Include standardized allowances for food, housing, books, supplies, transportation, and personal/miscellaneous expenses based on a nine-month academic year

- Actual campus budget information provided by the institutions on WebGrants, or on a College Cost Estimate form, will be used for Cal Grant awarding
Income and Asset Requirement

### 2019-20 CAL GRANT PROGRAM INCOME CEILINGS

<table>
<thead>
<tr>
<th>Dependent students and</th>
<th>Cal Grant A and C</th>
<th>Cal Grant B</th>
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<tbody>
<tr>
<td>Family size:</td>
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</tr>
<tr>
<td>Six or more</td>
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<tr>
<td>Five</td>
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<td>Two</td>
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<tr>
<td>Married, no other dependents</td>
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### 2019-20 CAL GRANT PROGRAM ASSET CEILINGS

<table>
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<td>Dependent students</td>
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<tr>
<td>Independent students</td>
<td>$37,700</td>
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</tbody>
</table>

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A high school student graduates in 2019 with a 2.9 GPA, has a household income of $50,000, and has a family size of three. Does this student qualify for a Cal Grant?

No, this student does not qualify because their GPA is below the ‘Cal Grant A’ 3.0 requirement and the student’s household income is higher than the Cal Grant B ceiling cap set at $48,500 for family sizes of three or less.
Total Income

Whose income?
- For dependent students – Parent income
- For independent students – Student (and spouse) income is used

How is it calculated?
- Figure received directly from a sub-calculation on the ISIR called the “Total Income”
- AGI + Untaxed Income – Exemptions to Income = TOTAL INCOME
Assets

Asset total is the sum of:

- 100% of reported cash, savings and checking accounts
- 100% of net worth of investments, including real estate
- Approximately 40% of business and farm assets per the amount from federal EFC formula tables A4 & B3 (100+ employees)

The Asset figure is taken from a sub-calculation on the ISIR called the “Net Worth.”
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Which of the following is not considered an asset for financial aid purposes?

1. Gold bars buried in the backyard
2. The paid off Honda Civic in the driveway
3. The $23 in the bank account
Cycles and Types

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Award Cycles

CAL GRANT A & B

ENTITLEMENT
- Unlimited
- FAFSA & CADAA filers

COMPETITIVE
- Limited (41,000)
- New in 2019-20: CADAA applicants now eligible!

Any student who does not meet Entitlement requirements

E1
- HS Seniors & prior year grads
- HS GPA

E2
- Transfer from CCC>4-year university
- 2.4 CCC GPA

Effective 2019/20:
- SB 77 increases the number of Competitive awards from 25,750 to 41,000 annually
- Dream Act Application filers are now eligible to apply for the Competitive cycle
High School Entitlement

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High School Entitlement (E1) Requirements

- Current High school seniors and last year’s graduates
- Meet general Cal Grant eligibility requirements
- Apply by March 2nd

Minimum High School GPA:
- CG A: 3.0
- CG B: 2.0

If no GPA, test scores from SAT, ACT, GED, TASC, & HiSET may be submitted if:
- Pass/Fail system
- Home-schooled

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E1 Preliminary Award Notification

Provides preliminary Cal Grant award information

- Lists Cal Grant maximum award amounts at all segments
- Additional information regarding how to claim the Cal Grant award

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Claiming the E1 Cal Grant Award

Requirement for High School Entitlement awards

Students log into the WebGrants for Students portal to claim their awards:
- Self-certify high school graduation
- Confirm school of attendance

Colleges can also claim students in WebGrants:
- Report a School Change
- Verify HS graduation with HS diploma/transcripts

2019-20 Student Claiming Functionality opened:
- February 2019

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Transfer Entitlement

Under California Education Code Section 69436, students transferring directly from a California Community College to qualifying baccalaureate-degree granting institution (BDGI), who were not previously awarded a Cal Grant, may receive consideration for a Transfer Entitlement award.

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Transfer Entitlement (E2) Requirements

In addition to meeting basic eligibility requirements, students must also meet additional Transfer Entitlement eligibility qualifications:

**Option A:**
- High School graduate or equivalent
- CA resident at time of HS graduation

**Option B:**
- Did not graduate
- CA resident on 18th birthday

**PLUS**
- Complete a FAFSA/CADAA by the March 2nd deadline
- Under age 28 on December 31st of the award year
- Transfer from CCC to bachelor degree-granting institution (BDGI) in the year awarded
- Income/assets within ceilings & sufficient financial need
- CCC GPA of 2.4
E2 Preliminary Award Notification

- Preliminary award notice is sent to student
- Student completes the G-6 electronically at webgrants4students.org
- The G-6 is processed:
  - **Eligible Students**: Receive a California Aid Report (CAR)/Cal Grant Award Letter
  - **Ineligible Students**: Processed later for a March Competitive Award

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New Transfer Versus Continuing Student

- Schools determine student status:
  - New transfer (eligible)
  - Continuing student (ineligible)
- Students must transfer in the academic year following enrollment at CCC
- Payment Requirement:
  - **New** E2 students must receive at least 1 payment by year end
  - Posting Leave of Absence (LA) for all terms will result in year-end withdrawal
- Summer terms
  - Early admits are eligible

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AB 840 Verification

**AB 840** stipulates that 10% of new & renewal awards are randomly flagged for verification of Transfer Entitlement eligibility. *Complete verification prior to disbursement* after verifying:

- Direct transfer from CCC to BDGI
- CA resident at time of high school graduation or on 18th birthday

**AB 840/E2 flags can be viewed on the:**

- Display Roster
- E2 Verification Report

**Best Practice:** Collect verification documentation during initial award year in the event student is flagged in the future for AB 840 eligibility

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Eligibility Documentation

Direct transfer from CCC to BDGI:
- CCC Transcripts – prior year enrollment
- BDGI Transcripts – when enrollment began at BDGI
- Enrollment agreements

California resident at time of high school graduation or on 18th birthday:
- HS transcripts
- Tax forms
- CA Drivers License or CA Identification Card
- Utility bills or mortgage payments

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<table>
<thead>
<tr>
<th>New Awards</th>
<th>Renewals</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Regular E2 Eligibility</strong></td>
<td><strong>AB 840 Verification</strong></td>
</tr>
<tr>
<td>General CG eligibility</td>
<td>General CG eligibility</td>
</tr>
<tr>
<td>HS transcripts or graduate from CA HS</td>
<td>HS transcripts or graduate from CA HS</td>
</tr>
<tr>
<td>CCC transcripts</td>
<td>CCC transcripts</td>
</tr>
<tr>
<td>BDGI transcripts</td>
<td>BDGI transcripts</td>
</tr>
<tr>
<td>CA resident at HS graduation or resident @ 18</td>
<td>CA resident at HS graduation or resident @ 18</td>
</tr>
</tbody>
</table>

Keep documentation in student files. The Compliance team checks for this during audit reviews.

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Making education beyond high school financially accessible to all Californians.

CCC Bachelor (CCBA) Program
CCC Bachelor Programs

Students enrolled in a CA Community College Bachelor Program (CCBA) are also eligible to receive the Transfer Entitlement (E2) awards.
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**Student Aid Commission**

**CCC Bachelor Programs**

<table>
<thead>
<tr>
<th>Community Colleges</th>
<th>Bachelor Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Antelope Valley College</td>
<td>Airframe Manufacturing Technology</td>
</tr>
<tr>
<td>Bakersfield College</td>
<td>Industrial Automation</td>
</tr>
<tr>
<td>Cypress College</td>
<td>Mortuary Science</td>
</tr>
<tr>
<td>Feather River College</td>
<td>Equine and Ranch Management</td>
</tr>
<tr>
<td>Foothill College</td>
<td>Dental Hygiene</td>
</tr>
<tr>
<td>MiraCosta College</td>
<td>Biomanufacturing</td>
</tr>
<tr>
<td>Modesto Junior College</td>
<td>Respiratory Care</td>
</tr>
<tr>
<td>Rio Hondo College</td>
<td>Automotive Technology</td>
</tr>
<tr>
<td>San Diego Mesa College</td>
<td>Health Information Management</td>
</tr>
<tr>
<td>Santa Ana College</td>
<td>Occupational Studies</td>
</tr>
<tr>
<td>Santa Monica College</td>
<td>Interaction Design</td>
</tr>
<tr>
<td>Shasta College</td>
<td>Health Information Management</td>
</tr>
<tr>
<td>Skyline College</td>
<td>Respiratory Care</td>
</tr>
<tr>
<td>Solano Community College</td>
<td>Biomanufacturing</td>
</tr>
<tr>
<td>West Los Angeles College</td>
<td>Dental Hygiene</td>
</tr>
</tbody>
</table>
Test Your Knowledge!

What is the minimum GPA a student can have and still be eligible for the Cal Grant A Transfer Entitlement award?

A 2.4 GPA. Even though High School Entitlement for Cal Grant A requires a 3.0 or higher GPA, the Transfer Entitlement for Cal Grant A (or B) only requires a minimum Community College GPA of 2.4.
Transfer Entitlement Brochures are now available!

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Competitive Cycle

Competitive applicants are all students who do not meet Entitlement criteria

**MERIT:**
- 2.40 College GPA – CG A
- 2.00 College GPA – CG B

**AWARDS:**
- Cal Grant A and B
- 41,000 awards
  - 20,500 – March 2
  - 20,500 – September 2
- Scoring matrix used to rank & award students

<table>
<thead>
<tr>
<th>Category</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expected Family Contribution</td>
<td>250</td>
</tr>
<tr>
<td>Family Income &amp; Household Size</td>
<td>250</td>
</tr>
<tr>
<td>Grade Point Average</td>
<td>100</td>
</tr>
<tr>
<td>Household Status</td>
<td>100</td>
</tr>
<tr>
<td>Education/Access Equalizer</td>
<td>100</td>
</tr>
<tr>
<td>Parent Education Level</td>
<td>100</td>
</tr>
<tr>
<td>Family/Environmental Indicators</td>
<td>100</td>
</tr>
</tbody>
</table>
Competitive Recycle

Recycle Awards
- Awards for unpaid students are withdrawn
- Offered to the next cohort of eligible students
- Goal = Maximize utilization and increase paid rate

Tips
- Report timely payments in WebGrants
- Customize roster to identify unpaid students
Cal Grant A

- HS GPA Minimum: 3.0
- Degree Requirements:
  - Minimum 2 year program
  - Associate or Baccalaureate Degree
- Up to 4 years of tuition & fees
  - CCC Reserve for 2 years*

2019-20 Maximum Award:

<table>
<thead>
<tr>
<th></th>
<th>CCC</th>
<th>CSU</th>
<th>UC</th>
<th>Private NP *</th>
<th>For Profit ^</th>
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</thead>
<tbody>
<tr>
<td>CCC reserve</td>
<td>$5,742</td>
<td>$12,570</td>
<td>$9,084</td>
<td>$4,000</td>
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</tr>
</tbody>
</table>

* Students with dependent children may be eligible for up to $6,000 Access Award at a CA public college/university

* Private non-profit institutions and WASC accredited for-profit schools
^ Non-WASC accredited for-profit institutions
Cal Grant A - CCR

Community College Reserve:

- Income/Asset Ceilings are not considered
- Students will renew for two years

**New in 2019-20:**

- Students will have the ability to extend their CCC Reserve for a 3rd year via the student portal
- Recipients of the *Cal Grant Award for Students with Dependents* are eligible to receive the **Access** portion of the Cal Grant A; therefore, eligibility will be used beginning with the first Access disbursement
# Cal Grant B

- HS GPA Minimum: 2.0
- Degree Requirements:
  - Minimum 1 year program
  - Certificate, Associate or Baccalaureate Degree
- Tuition & fees for years 2-4
- $1,672 Access Award for up to 4 Years

## 2019-20 Maximum Award:

<table>
<thead>
<tr>
<th>Award</th>
<th>CCC</th>
<th>CSU</th>
<th>UC</th>
<th>Private *</th>
<th>For-Profit ^</th>
</tr>
</thead>
<tbody>
<tr>
<td>T/F</td>
<td>N/A</td>
<td>$5,742</td>
<td>$12,570</td>
<td>$9,084</td>
<td>$4,000</td>
</tr>
<tr>
<td>Access</td>
<td>$1,672</td>
<td>$1,672</td>
<td>$1,672</td>
<td>$1,672</td>
<td>$1,672</td>
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</tbody>
</table>

* Students with dependent children may be eligible for up to $6,000 Access Award at a CA public college/university

* Private non-profit institutions and WASC accredited for-profit schools
^ Non-WASC accredited for-profit institutions
Cal Grant B for Foster Youth

AB 1809 extends:

Application Window: Students can apply for a High School Entitlement grant if under age 26 by July 1 of the award year

Maximum Eligibility: from 4 years to 8 years of full-time enrollment

Application Deadline: from March 2nd to September 2nd for foster youth attending a CA community college

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Federal Foster Youth Verification

CDSS shares FY data with CSAC. Colleges can use this screen to verify foster eligibility (≥13 years old) for federal & campus
financial aid purposes.

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CG B-FY Identifier

Roster View:

<table>
<thead>
<tr>
<th>Program Code</th>
<th>Award Type</th>
<th>Annual Award</th>
<th>Term Amount</th>
<th>Adj Amount</th>
<th>Adj Reason</th>
<th>Pay Code</th>
<th>Annual Need</th>
<th>Income &amp; Asset Year Used</th>
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<tbody>
<tr>
<td>Totals</td>
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<td>$7,414</td>
<td>$3,707</td>
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Student Award Summary:

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>Program Name</th>
<th>Application Status</th>
<th>Award Status</th>
<th>Award Status Date</th>
<th>Award Amount</th>
<th>Cycle ID</th>
<th>School ID</th>
<th>P/E Reason</th>
<th>C/E Reason</th>
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<tr>
<td>2018-2019</td>
<td>B-FY</td>
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<td>2017-2018</td>
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<tr>
<td>2016-2017</td>
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<td>00115500</td>
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</table>

Note: The highlighted cell indicates that the student was awarded in the Foster Youth Cal Grant B Program.
Phase I: Eligibility Increased

- 2019-20 renewal students who had exhausted eligibility were automatically renewed with 400% additional eligibility

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The Student Success Completion Grant

A maximum of $1,298 annually for 12 through 14 units per term at a California Community College

A maximum of $4,000 annually for 15 units or more per term when enrolled at a California Community College

- Attend a California Community College - Receive a Cal Grant B or C award
- Maintain a minimum of 2.00 cumulative GPA - Have sufficient unmet financial need
- Maintain federal Satisfactory Academic Progress (SAP) standards while enrolled
- Be exempt from nonresident tuition - Maintain full time attendance
California College Promise Grant

The California College Promise Grant (formerly Board of Governors or BOG Fee Waiver) is available to students who are California residents attending California community colleges. Per-unit enrollment fees (currently $46 per unit) are waived for eligible students.

There are three types of CA College Promise Grant fee waivers:

- **CCPG A** -- For students and/or a student's parent who are currently receiving some form of public assistance (AFDC, TANF, CalWORKs, SSI, and General Assistance).
- **CCPG B** -- Based upon current household size and total 2017 income for the student and/or student's parent(s). Income standards are provided by the state Chancellor's Office. A CCPG B may be awarded based upon the income and household size information provided on the FAFSA or California Dream Act application.
- **CCPG C** -- Must demonstrate at least $1,104.00 worth of financial need in order to qualify.
Cal Grant B – Top 2% 

• Allows limited high school entitlement students to receive T/F in their 1st year 

• Students are scored using a disadvantage scoring criteria 

• Adjusted award amounts will reflect on the roster 

• All other high school entitlement recipients will receive only the access portion in the 1st year 

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Cal Grant C

Program Requirements
- Vocational/technical/occupational programs
- At least 4 months in length
- No GPA requirement
- Eligible programs listed on USDE E-CAR report
- Special consideration for priority occupations & long-term dislocated workers

2019-20 Maximum Award:

<table>
<thead>
<tr>
<th>Award</th>
<th>CCC</th>
<th>Independent/Vocational</th>
</tr>
</thead>
<tbody>
<tr>
<td>B/S</td>
<td>$1,094</td>
<td>$547</td>
</tr>
<tr>
<td>T/F</td>
<td>N/A</td>
<td>$2,462</td>
</tr>
</tbody>
</table>

Students with dependent children may be eligible for up to $4,000 Access Award at a CA public college/university.
Cal Grant C Supplemental Form

- Student deemed financially eligible
- Student completes the C Supplement Form electronically at webgrants4students.org
- This form is processed:
  - Occupational goal
  - Educational plan
  - Work history
  - Education history
  - Unemployed for 6 months+
Cal Grant C

Priority Occupations:

- Two of the following must be met:
  - High employer need or demand
  - High employment growth or industry cluster
  - High employment salary and wage projections
  - Economic security

- Special consideration for long-term unemployed (6+ months)

List of approved priority occupations are available on the Commissions website

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## Priority Occupational List

<table>
<thead>
<tr>
<th>Reported Occupation</th>
<th>Point Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Claims Adjusters, Examiners, &amp; Investigators</td>
<td>25</td>
</tr>
<tr>
<td>Web Developers</td>
<td>25</td>
</tr>
<tr>
<td>Computer User Support Specialists</td>
<td>25</td>
</tr>
<tr>
<td>Computer Network Support Specialists</td>
<td>25</td>
</tr>
<tr>
<td>Architectural and Civil Drafters</td>
<td>25</td>
</tr>
<tr>
<td>Civil Engineering Technicians</td>
<td>25</td>
</tr>
<tr>
<td>Electrical and Electronics Engineering Technicians</td>
<td>25</td>
</tr>
<tr>
<td>Paralegal and Legal Assistant</td>
<td>25</td>
</tr>
<tr>
<td>Respiratory Therapists</td>
<td>25</td>
</tr>
<tr>
<td>Registered Nurses</td>
<td>25</td>
</tr>
<tr>
<td>Dental Hygienists</td>
<td>25</td>
</tr>
</tbody>
</table>
California Aid Report

- Student official award notification
- Given in the initial academic year the Cal Grant is awarded
- Provided after:
  - High school entitlement: Student confirm the school of attendance
  - Transfer entitlement: Student submits the Transfer Entitlement Certification Form
  - Competitive: Awards are processed
  - Cal Grant C: Student is scored with responses from C Supplement Form

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Which Cal Grant is the best?

All Cal Grants are beneficial!

The financial aid application is a one stop shop for most financial aid, including federal, state and institutional aid.

Completing the FAFSA or the CADAA means the student has applied for A, B and C.

Most beneficial award is auto-accepted based on school segment.

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Cal Grant A or Cal Grant B

- If a student is eligible for both A and B, the Commission will award the most beneficial grant, based on the school of attendance.

- Students may only change their Cal Grant type prior to their first payment by completing the G-10 form, which requires a signature from a school financial aid advisor.

- Once a payment is reported, the student is locked into that award.

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Cal Grant B or Cal Grant C

• Students in a certificate or associates degree program (including vocational programs) may be eligible for the Cal Grant B

• Cal Grant C awardees who are not in a vocational program and request to have their applications reprocessed for Cal Grant B consideration may be ineligible, based on cycle processing.
Fifth Year Benefits

- Schools should report their programs on the College Cost Estimate

- Student must be enrolled in an approved mandatory five-year undergraduate program

- Student must already be a Cal Grant recipient and must have financial need

- Must submit a request for fifth year benefits form (G-42)

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Teaching Credential Program

Extends Cal Grant A/B benefits for 1 additional year for students who are seeking an initial teaching credential. Cannot be used for other graduate level courses of study.

Students must:

- Be enrolled in a teaching credential program and have received at least 1 payment
- Hold a bachelor’s degree, or have completed all requirements for a BA/BS
- Be enrolled in an institution approved by the CA Commission on Teacher Credentialing with 15 months of the end of the term in which a Cal Grant payment was received
- Submit FAFSA/CADAA and Teaching Credential Program Benefits (G-44) Form as soon as possible after completing bachelor and being accepted into TCP program

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A student is in their first year at UC Davis and has received a Cal Grant A payment, but when she first applied for financial aid she was eligible for Cal Grant A and B. Is this student able to switch her Cal Grant A to a Cal Grant B?

NO; once a student receives a Cal Grant A payment they cannot switch to a Cal Grant B, even if they were eligible for both when they first applied.
Renewal Students

• Have at least 10% remaining eligibility
• Have all terms satisfied with a renewable transaction
• Have a current FAFSA/CADAA on file
  o Filed before year-end reconciliation
• Meet financial requirements

Renewal students are not held to the March 2 and September 2 deadlines

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Renewal B to A Switch

Students who are eligible for both Cal Grant A and Cal Grant B in the initial award year but exceed the lower income/assets ceiling of the Cal Grant B in renewal year:

- Automatically switched to Cal Grant A, providing they are still income-qualified

* If GPA is above Cal Grant A threshold

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Renewal Exception

Any recipient who was ineligible for a renewal award during the prior year due to:

- exceeded the income or asset ceilings
- did not demonstrate financial need

Will be eligible to receive a renewal award* if:

- all eligibility requirements for renewal are met
- has remaining program award eligibility

*The program eligibility will be reduced by one full-time equivalent academic year.
Renewal Exception Example

Year 1
- Student awarded Cal Grant A with 400% eligibility
  - Student paid full time for all terms (100% eligibility used)
  - Remaining eligibility at year-end: 300%

Year 2
- Student ineligible for renewal
  - Income over ceiling for Cal Grant A
  - If income-eligible in year 3, 100% eligibility reduction will be accounted for in renewal year

Year 3
- Student eligible for renewal
  - Meets financial requirements for Cal Grant A
  - 100% eligibility reduction from year 2 applied
  - Renewed with reduced remaining eligibility: Now 200%
Renewal Exception Example

- 2016-17: Original award. “Auto-accepted” for CG A

**Year 1:**
- 2017-18 Renewed “Financially Eligible”

**Year 2:**
- 2018-19: Ineligible for renewal per income over ceiling

**Year 3:**
- 2019-20 Student regains financial eligibility. Automatic renewal exception granted

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Award Sequence

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Awarding Process

- FAFSA/CADAA and GPA
- Entitlement or Competitive Filter
- Non Financial Edits
- Competitive Scoring
- Entitlement Selection
- Financial Edits
- Placed on Roster

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Processing ISIRs

ISIRs are received by CSAC if:
• California is listed as the state of residence or
• There is at least one California school listed

Award Consideration
• Entitlement: draw down and processed weekly
• Competitive: the most recent transaction on or before the application deadline

Once a student is awarded, subsequent ISIRs are not reviewed for award consideration

Only ISIRs with an EFC will be processed
Corrections to Award or Withdraw Students

Corrections to a student’s record may be submitted via a Grant Record Change Form (G-21)

When submitting financial changes which result in making a student ineligible, reverse payments prior to submitting the G-21

Entitlement applicants
• Appeals to award will be received through June 30 of the award year
• Perform financial corrections for ineligible students on ISIR, CSAC will reprocess student with the new transaction

Competitive applicants
• Perform corrections, including financial changes and education level, on student’s ISIR prior to application processing
• No corrections after award selection - period!

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Corrections to Award or Withdraw Students

Submit Grant Record Change Form (G-21):

- Income and asset verification
- Financial need changes
- Expected Family Contribution
- High school graduation date not in Entitlement range
- Housing status
- Education level for initial award year
- California residency
- Application “on hold”
Grant Record Changes (G-21)

- Changes/updates to student records:
  - Financial need
  - EFC
  - Housing
  - EL (initial award year)
  - CA residency

- G-21’s are reviewed by Commission staff before approval
G-21 NOT for...

- Withdrawing a graduated student
  - Use the SR adjustment code on online roster
- Requesting withdrawal after reporting IG in error
  - Request reinstatement
  - Submit G-21 with corrected income or financial data to withdraw student
- Student not eligible for Transfer Entitlement
  - Report “IT” on roster
- Profession Judgement on a Competitive awardee
  - Make correction to student’s application before C1/C2 award cycle
- Verifying Education Level
  - Verify on roster
- Withdrawing ineligible student after payment or adjustment was already posted
  - Back out all transactions before submitting G-21
Let’s Review

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Cal Grant Programs

- **Cal Grant**
  - **Entitlement**
    - High School Entitlement (E1)
      - Cal Grant A
      - Cal Grant B
  - CCC Transfer Entitlement (E2)
    - Cal Grant A
    - Cal Grant B
  - Competitive Cal Grant C
  - Competitive Awards (C1 & C2)
    - Cal Grant A
    - Cal Grant B
Questions?

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