



# Cal Grant Regional Training

## Cal Grant 101

**Training and Outreach Unit  
California Student Aid Commission**

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Throughout this presentation, you will notice these icons. They are there to let you know of additional resources that are available for you. These resources can be found on the Commission's website or in your WebGrants portal.



**Training Video Icon:** There are additional training videos found on the Commission's website.



**User Guide Icon:** There are detailed user guides to walk you through the different processes found on the Commission's website and your WebGrants portal.



**Resource Icon:** There are additional resources found in the Resources Document for Regional Training.



**Webinar Icon:** There are additional live webinars that you can sign up for.

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# 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 California Community College (CCC)
- Cal Grant A and B
- Competitive awards only
  - **Starting in 2019-20:** CADAA applicants are now eligible
  - Exception: Foster youth who qualify for Cal Grant B are *Entitlement* applicants

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# GPA Unit Requirements



High School GPA	Re-Established GPA	Regular GPA
Used for High School Entitlement awards	16 – 23 semester units	24+ semester units
Colleges can submit a HS GPA if they obtain HS transcripts and student is within 1 year of HS graduation	24 – 35 quarter units  *If unable to calculate GPA due to too few units, refer student to last school of attendance with the most completed units.	36+ quarter units
	Valid for Competitive Cal Grant B only	

**2020-21 Student Late GPA Appeal (G-17)**

- Entitlement: Deadline May XX, 2020
- Competitive Cycles:  
 March 2: Deadline March XX, 2020  
 September 2: Deadline September XX, 2020

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# General Eligibility Requirements

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# California Residency



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

Married or 18+

Based on their own CA residency status

Based on residency of their parents

Under 18

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# 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
- Under the jurisdiction of the juvenile justice system in a juvenile facility.
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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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# Bachelor Degree Holders



**Ineligible for Cal Grant:**

- Bachelor degree holders from foreign or unaccredited schools

**Exception:**

- Teaching Credential Programs
- Mandatory 5<sup>th</sup> year programs



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# 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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# 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



$$\begin{array}{r} \text{Cost of Attendance (COA)} \\ - \text{Expected Family Contribution (EFC)} \\ \hline \text{Unmet Financial Need} \end{array}$$

Cal Grant A	Cal Grant B	Cal Grant C
<b>Financial Need</b> Maximum Cal Grant A award amount + \$1,500	<b>Financial Need</b> At least \$700	<b>Financial Need</b> 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

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# Income and Asset Requirements



2020-21 CAL GRANT PROGRAM INCOME CEILINGS		
	Cal Grant A and C	Cal Grant B
<b>Dependent students and Independent students with dependents other than a spouse</b>		
<u>Family size:</u>		
Six or more	\$123,100	\$67,600
Five	\$114,100	\$62,600
Four	\$106,500	\$56,000
Three	\$98,000	\$50,300
Two	\$95,700	\$44,700
<b>Independent students</b>		
Single, no dependents	\$39,000	\$39,000
Married, no other dependents	\$44,700	\$44,700

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# Federal Summer Crossover

Unlike the federal Pell Grant that allows summer term crossover, Cal Grant term payments made in an award year *must* correspond to the FAFSA/ISIR for the same award year.

## Summer term is always a trailer for Cal Grant purposes

### Pell Grant:

- Summer 2019 and summer 2020 can both fall in the 2019-20 award year; **or** these summer terms can be paid from 2019-20 and 2020-21 ISIRs, respectively.

### Cal Grant:

- Summer 2019/20 is based on 2019/20 ISIR
- Summer 2020/21 is based on 2020/21 ISIR



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# Cycles and Types

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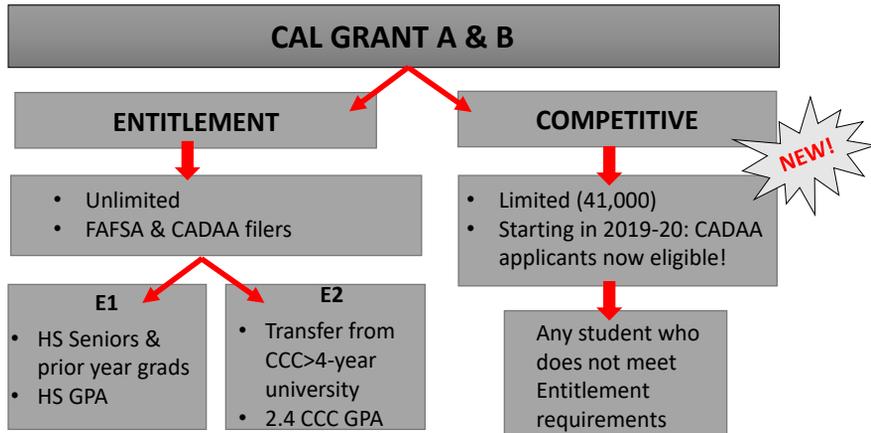
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# Award Cycles



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# Entitlement Cal Grant Awards

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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 with FAFSA or CADAA by March 2<sup>nd</sup>

Minimum High School GPA must be submitted by March 2<sup>nd</sup>:

- 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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# Federal Foster Youth Verification



California Student Aid Commission (SAPRD) [Portal Menu](#) [WebGrants](#) [Tools](#) [Help](#) [Sign Out](#)

**WebGrants System**

Welcome!  
To the WebGrants Menu

The last time you logged on to this system was: 05/09/2019 03:43:40 pm  
Number of failed attempts since your last login: 0

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

WebGrants Menu	Account Information
<a href="#">Enrollment</a> <a href="#">GPA</a> <a href="#">Student Info</a> <a href="#">School Info</a> <a href="#">Roster/Reconciliation</a> <a href="#">Data Transfer</a> <a href="#">Chafee Grant</a> <a href="#">Accounting</a> <a href="#">NON-SSN GPA</a> <a href="#">Foster Youth Verification</a>	<a href="#">View Your Account Details</a> <a href="#">Help With Your Account</a>

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

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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 18<sup>th</sup> birthday

**\*\*PLUS\*\***

- Complete a FAFSA/CADAA by the March 2<sup>nd</sup> deadline
- Under age 28 on December 31<sup>st</sup> 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
- When awarded a Cal Grant, students must complete the G-6 (online at WebGrants 4 Students or paper form)

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# New Transfer VS 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** 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 18<sup>th</sup> 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 18<sup>th</sup> birthday:

- HS transcripts
- Tax forms
- CA Drivers License or CA Identification Card
- Utility bills or mortgage payments

The G6 Transfer Entitlement form is required by the student. However, this does NOT satisfy verification requirements.

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# Competitive Cal Grant Awards

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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

Category	Points
Expected Family Contribution	250
Family Income & Household Size	250
Grade Point Average	100
Household Status	100
Education/Access Equalizer	100
Parent Education Level	100
Family/Environmental Indicators	100

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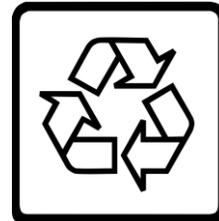
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# Competitive Recycle

## 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

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# CCC Bachelor (CCBA) Program

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# CCC Bachelor Programs

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

Awarding for E2 CCBA students is done manually.



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# Community College Grants

## The Student Success Completion Grant

The Student Success Completion Grant became effective in Fall 2018. It is awarded to California Community College students who collect the Cal Grant and are Full-Time. Students are required to enroll in 12 or more units, meet both college and federal satisfactory academic standards, and be exempt from nonresident tuition.



## 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.

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# 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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## Cal Grant A or 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 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.

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## 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 or teaching credential 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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# Renewal Students

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# Renewal Students



- Have at least 10% remaining eligibility
- Have all terms satisfied with a renewable transaction
- Have a current FAFSA/CADAA on file
  - 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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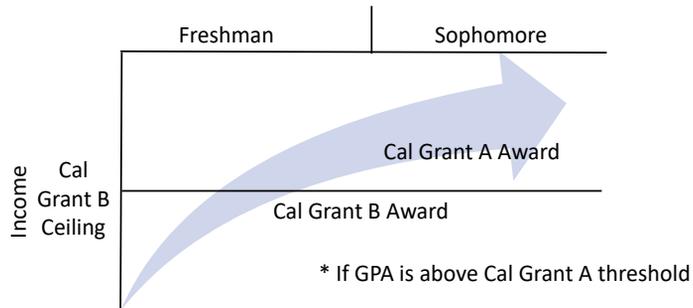
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# Renewal B to A Switch



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



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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.*

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# Renewal Examples



## 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%

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# 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 grad date not in Entitlement range
- Housing status
- Education level for initial award year
- California residency
- Application “on hold”

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## G-21 is 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
- **Verifying Education Level**
  - Verify on roster
- **Professional Judgement on a Competitive awardee**
  - Make correction to student's application before C1/C2 award cycle
- **Withdrawing ineligible student after payment or adjustment was already posted**
  - Back out all transactions before submitting G-21

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# Non-Traditional Terms

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## Non-Standard Terms & Non-Terms

“Although a non-term based or non-traditional school does not have terms, the school’s Cal Grant payments must be spread out over the year with attendance required during each payment period. Cal Grant funds will only be paid to a student who is enrolled and in attendance for at least one half of an institutionally selected payment period.”



Source: *Cal Grant Handbook, Chapter 13*

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# Clock Hours

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# Clock-Hour Conversions

Per the US Department of Education Office of Postsecondary Education (34CRF 668.8 (k)):



- 1 Semester unit is equivalent to 37.5 clock hours of instruction.
- 1 Quarter unit is equivalent to 25 clock hours of instruction.

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# Calculating a Term Payment

*Full-Time Enrollment*

Add up total clock hours for the term, then divide by 37.5 hours (Semester) or 25 hours (Quarter) to determine the student's enrollment status.

Example:

- Student is enrolled in 450 Clock Hours for the Fall term
- $450 \text{ Clock Hours} / 37.5 \text{ Hours} = 12 \text{ Semester Units}$
- Student is eligible for a Full Time payment for Fall

Fall Term: August 23, 2019 - January 23, 2020	
Fall Term Start/End Dates	Clock Hours
August 23- October 4	50
October 5- November 8	80
October 8, 2019- January 9, 2020	200
November 9, 2019- January 23, 2020	120
<b>Total=</b>	<b>450</b>
<b>450 clock hours/37.5= 12 semester units. Student is considered Full Time</b>	

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# School Responsibilities



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**CSAC Academic Year: July 1- June 30**

**Cal Grant Monthly Checklist**

<b>July</b>	<ul style="list-style-type: none"><li>• 7/31: Annual deadline to submit &amp; renew WebGrants System Administrator Access Request form &amp; Confidentiality Agreement</li><li>• Fall Cal Grant payment roster opens</li></ul>
<b>August</b>	<ul style="list-style-type: none"><li>• 8/31: Deadline for CA License Exam Reporting</li><li>• Cal Grant Fall term advance processed</li></ul>
<b>September</b>	<ul style="list-style-type: none"><li>• Deadline for year-end reconciliation for prior award year<ul style="list-style-type: none"><li>➢ Utilize Monthly Payment Activity &amp; Reconciliation reports</li></ul></li></ul>
<b>October</b>	Deadline to update College Cost Estimate screen for upcoming award year
<b>December</b>	12/31: Deadline for SB 70 reporting of Enrollment, Persistence, & Graduation + job placement and salary/wage information
<b>January</b>	Spring Cal Grant payment roster opens
<b>March</b>	<ul style="list-style-type: none"><li>• 3/1: Deadline to remit interest earned on Cal Grant funds for prior calendar year</li><li>• Cal Grant Spring term advance processed</li></ul>
<b>June</b>	<ul style="list-style-type: none"><li>• Cal Grant renewal award cycle runs</li><li>• Summer Cal Grant payment roster opens</li></ul>

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