



Cal Grant Regional Training Disbursements and Payments

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

Making education beyond high school financially accessible to all Californians

Icons

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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Disbursement of Cal Grant Funds

Term Advance vs. Supplemental Payments

Term Advance

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Term Advance

- Sent to institutions at the start of each term
- Based on a percentage of previous year's reconciled term amount
- Fall term advance is set at 95%
- Schools not eligible to receive advance:
 - New to Cal Grant program
 - Previously ineligible in prior year
 - At-risk schools

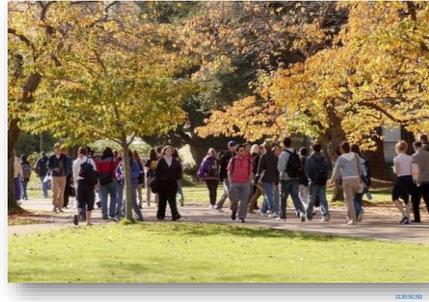


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Fall Term Advance Example

Fall Term Advance Rate: 95%

- Fall 2019, CSAC City College reconciled \$1,420,000
 $\$1,420,000 \times .95 = \$1,349,000$
- Fall Term 2020, the Commission sends a Term Advance of \$1,349,000



Supplemental Payments

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Supplemental Payments

Weekly process

School's account is reconciled with the accepted payment transactions.

Result

If reconciled payments **exhausts** the advanced amount, supplemental payments are initiated.

Example:

- City College Fall 2019 advance \$142,500
- City College posted payments total \$150,000
- Supplemental funds of \$7,500 will be sent

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Payments

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Reporting Payments

Directly on the Display Roster

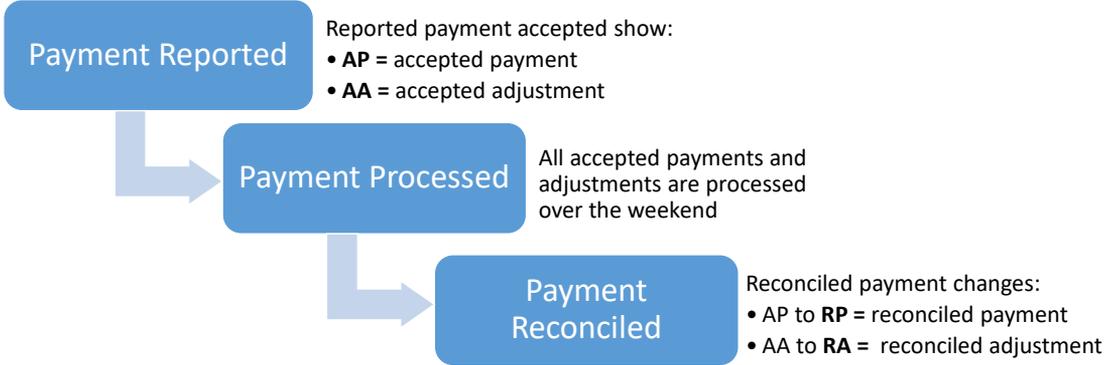
- Convenient
- Real-time. No waiting!
- Commonly used by smaller schools

Upload Grant Roster Data File

- Upload large number of students at once
- Import/export data using Financial Aid Management Systems (FAMS)
- File specifications in WebGrants under “Help”



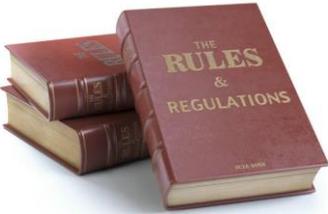
Weekly Process



Payment and Adjustment Policies

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General Rules

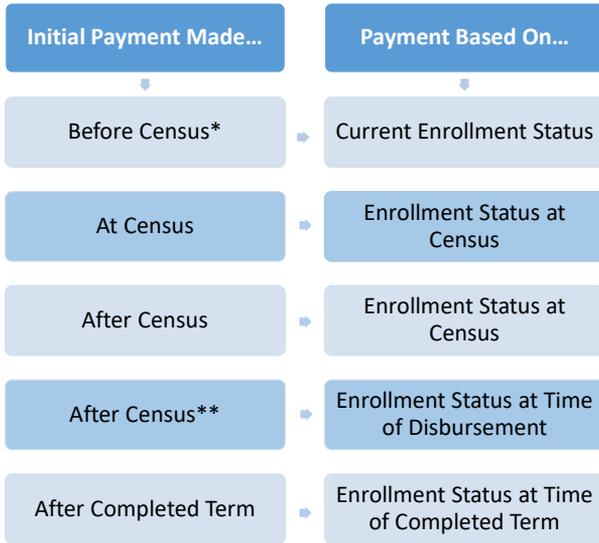


Student enrollment status is locked in at census for payment.

Payments should be disbursed based on enrollment status at census date or its equivalent.

Institutions should follow their policy regarding census dates.

Payment & Census



Suggested Guidelines:

Institutions should follow their policy.

* Adjustment may be needed at census if enrollment status changes

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

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Repeat Courses

CSAC recommendation follows federal rules.
Schools should follow their policy and procedures.

Before passing a course, a student may receive a payment for repeating a course, until the course is passed.

After passing the course, the student may receive payment to retake the course once.

<https://www2.ed.gov/policy/highered/reg/hearulemaking/2009/course.html>

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Refund Policy



Institutions are required to:

Establish and maintain a written refund policy that includes the Cal Grant Program.

Specify how to calculate the refund and how to determine the portion to be returned to the Commission on behalf of the State.

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Adjusting Refunds Example

If you determine a student is eligible to keep funds:

Adjust the enrollment status that charges the least amount of eligibility (Half-time or Three Quarter time).

The dollar amount cannot exceed the tuition charge nor exceed the adjustment amount for enrollment.

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Summer Enrollment



Summer term is a trailer for the academic year.

Summer payments will reduce remaining Cal Grant eligibility.

New Cal Grant awardees are eligible for a summer payment in the first year.



Summer Enrollment Options

Mandatory (year-round schools):

- Requires the summer term attendance
- Reported through the College Cost Estimate
- Roster automatically programmed to allow summer payments

Discretionary (traditional schools):

- Attendance is not required
- Summer term can be added on the display roster to request payments

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Mandatory Summer Enrollment

Cal Grant B Tuition and Fees

For terms that begin July 1 or later, a sophomore student may receive a summer Tuition and Fees payment.

Manual payment processed after Access is reported.

Cal Grant C Books and Supplies

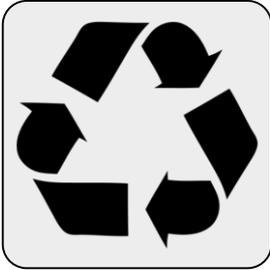
Students may receive a summer payment preceding their first year as a Cal Grant awardee.

Eligibility adjustments are reflected in WebGrants.

Schools must provide manual payment process claim form

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Competitive Recycle



Awards are recycled if:

No applicable transaction for any terms

**Awards are not recycled if the following codes
are reported:**

FI, NP, OH, OF, OT, FT, TT, HT, LH, LA

Reporting Payments

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Clear verification flags prior to reporting payments:

- Education level verification (for all new awardees)
- AB 840 verification (10% of transfer entitlement students)

If payments are attempted prior to clearing verification flags:

- Payments may be rejected, but verification flags will process
- Must wait until after weekend processing to report payment

Only report payment once for a student per term unless there needs to be an adjustment.

- Schools that upload payment files should remove students that already have a payment reported in previous files.
- Review the Accept/Reject report weekly.

Education Level Verification

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Education Level Verification

Institutions will verify EL at the time of student's *first* Cal Grant payment.

EL should be verified for new recipients prior to making first Cal Grant payment, except for:

- First time, never attended college
- Cal Grant C participants



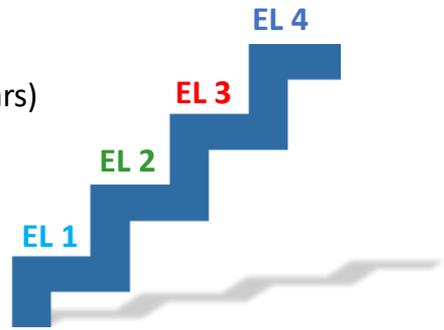
Each institution implements their own policy:

- Completed units
- Transfer units



Education Level

- Determines a student's maximum eligibility
- Maximum Cal Grant eligibility = 400% (4 years)
- Additional eligibility is provided for:
 - Teaching Credential Programs
 - Mandatory 5 Year Programs
 - Cal Grant B for foster youth



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