Day Two Agenda

1. Navigating WebGrants
2. Reports and Tools
3. Reconciliation
4. Resources
5. Chafee Grant
6. Middle Class Scholarship *

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2019 Regional Training Day 2
California
Student Aid Commission

Navigating WebGrants
Disclaimer

All student data provided in the following reports are fictitious. Student names, Date of Births, GPAs and school information have been modified to protect all third parties. All material presented today is for training purposes only.
Getting Access

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Getting Started with WebGrants

Complete and submit:

- WebGrants System Administrator’s Access Request Form or User Access Request Form
- Information Security and Confidentiality Agreement

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WebGrants Access Forms

- 1 Authorized Official
- 2 max System Administrators
  - Immediately grant/disable user access
- User Access Request Form
  - Maintained at school for each user
  - Renewed annually by July 31 or with change of staff
- Records to be retained for 3 years
- Complete the Information Security Training

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Information Security Training

• Complete security training annually

• Must cover the following areas:
  • Information security
  • Privacy
  • Confidentiality

• Must retain training documentation at the institution
Your WebGrants Account

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Your WebGrants Account

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

Portal Menu
- WebGrants
- Table Edit
- User Administration
- CA Dream Act
- SB 70

Account Information
- View Your Account Details
- Help With Your Account
Your Account Details

- Keep your personal info up-to-date (phone number, email address)
- Change your password if necessary
If You Are The System Administrator...

You have access to create/change WebGrants User Accounts for your campus.
### User Administration

<table>
<thead>
<tr>
<th>User Administration Menu</th>
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<tbody>
<tr>
<td>Add New Users</td>
</tr>
<tr>
<td>Edit Existing Users</td>
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<tr>
<td>User Access Report</td>
</tr>
</tbody>
</table>

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Adding a New User

- User ID must be unique
- All fields marked with (*) are required
- Access cannot exceed 1 calendar year
- User Access Forms must be kept on file

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Adding a New User

- Assign access to specific WebGrants screens depending on User role
- For Example: a User from your fiscal office may only need access to ‘Report Download’, and the Reconciliation screens.
Disabling User Access

- Disable WebGrants access for staff that depart
- Input the date on the “End Date”
WebGrants User Access Report

- View all active & inactive accounts for your campus
- See when each User account will expire (End Date)

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Best Practice

Renew your access each year
- Set reminders to review user end dates
- Information Security Confidentiality Agreement
- System Administrator Access Request Form

Contact Technology Help Desk for access assistance
- 888-294-0148
- csachelpdesk@csac.ca.gov

Contact Institution Support for Cal Grant assistance
- 888-294-0153
- schoolsupport@csac.ca.gov

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Student Info Screens

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Award Summary

- Displays history of a Cal Grant application for individual students
- Hover mouse over many of the fields to see more detail
Student Award Detail

- Information listed on the FAFSA or CADAA
- View details of award or disqualification by Academic Year
- Shows Competitive Cal A & B Scores
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Student History

- Each term payment ever reported
- Dollar amounts
- Amount of eligibility used for each payment
- Remaining eligibility
School Info Screens

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Institution Demographics

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Contact Information

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Cost Estimate for the **following** academic year is due October of each year.

If a school did not submit updated cost estimates for the 2020-21 academic year by the deadline, the Commission will use data from the 2019-20 year.
Display Roster

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Timing of Rosters

When do we release rosters?
- 2019-20 AY – February 2019
- 2020-21 AY – February 2020

When do students appear on the roster (by cycle)?
- High School Entitlement – after students are claimed
- Transfer Entitlement – immediately after award processing
- Competitive – immediately after award processing
- Cal Grant C – after students are scored
- Renewal – immediately after award processing

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Timing of Rosters

What are the next steps?

- Identifying Cal Grant awardees at your campus
- Certify student eligibility
- Collect appropriate verification documents
- Verify any holds or flags
  - Education Level
  - AB 840
Identifying Cal Grant Awardees

Utilize the Award Status Extract Process

- Provides 2 reports:
  - Awarded
  - Not Awarded

Create a batch School Change file for the awarded to ‘claim’ the student on your roster

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Confirmation Required

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Display Roster

- Grant ID
- Cycle ID
- Housing
- Dependency Status
- New/Renewal
- Education Level
- CSAC Budget
- EFC
- Remaining Eligibility
- Roster Section
- Flags
- Terms
- Program Code
- Award Type
- Annual Award
- Term Award
- **TANF Eligibility**
- **Foster Youth (Cal Grant B)**
- **Students with Dependent Children**

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Display Roster

Cycle ID: E1, E2, C1

Housing Code
1- On Campus
2- With Parents
3- Off campus

Dependency Status
N- New
R- Renewal

Education Level

TANF flag

“View History” links to ‘Student (Payment) History’ screen

- Remaining Eligibility: 700%
- Forecast Eligibility: 100% annual projected use (semester system)

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Custom Codes

1 2 3 4 5

High School Grad. Date Verification
Status: Verified by STDT
Verify As: Yes - Graduated on 05/2018
New Grad Date: Jan, 2018

(High School Grad. Date Verification through CSAC) Request By:
- Student
- High School
- College
- CSAC

Education Level (EL) Verification

Reported EL 1
Verified EL
Status 1 -- Verification Not Required

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### Grant Roster Data File

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Grant Roster Data File

- Report payments using batch upload process
Questions?

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