

Middle Class Scholarship

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

Making education beyond high school financially accessible to all Californians



Middle Class Scholarship

A completed, on time, FAFSA or CADAA application is all that is needed to be considered for the Middle Class Scholarship (MCS).

UC Maximum award amount for 2019-20: **\$5,028**

CSU Maximum award amount for 2019-20: **\$2,298**

Enrollment Requirements:

- Must be enrolled at a UC, CSU or California Community College Bachelor Degree Program (CCBA)
- Enrolled at least ½ time
- 1st Undergraduate program
- Students receive 10% - 40% of the mandatory system-wide tuition and fees

Maximum eligibility:

- 4 years, depending on education level when awarded & paid
- MCS can be used towards mandatory 5th year undergraduate programs & Teacher Credentialing programs
- Income ≤ \$184,000
- Assets ≤ \$184,000

Making education beyond high school financially accessible to all Californians

Application Information

- Students must submit a FAFSA or CA Dream Act Application by the March 2nd deadline.
- An enrollment record must be submitted by the campus for *all* students who should be considered for the award.
 - If student who is initially withdrawn or financially ineligible becomes eligible, a new enrollment record must be submitted.
- Available to students attending a UC or CSU, or a California Community College in the Bachelor Degree Program (CCBA)

Making education beyond high school financially accessible to all Californians

Awarding Process

Making education beyond high school financially accessible to all Californians

2020-21 Academic Year

- July 1, 2020 - June 30, 2021
- Ability to add manually or via the file upload process
- Files are processed weekly
- To reconsider a previously-awarded student for an MCS award, a new enrollment record must be submitted

Making education beyond high school financially accessible to all Californians

To identify potentially eligible students for MCS, email schoolsupport@csac.ca.gov. The Commission will determine preliminary eligibility. This is a manual process.

- Provide the following for all potentially-eligible students in the CCBA program:
 - FASFS/CADAA submitted by the March 2nd deadline
 - Name
 - CSAC ID
 - Education Level
 - Upper-division fees charged
 - Income/assets
 - Other Aid (Federal, Institutional, and State Aid)

Making education beyond high school financially accessible to all Californians

If your student is found **eligible** for MCS:

- CSAC will provide MCS roster template
- CCC uploads roster via “Secure File Transfer” and emails CSAC with file name & school code
- CSAC determines award/payment amounts, uploads MCS roster via “Secure File Transfer”, and notifies CCC
- CCC downloads roster; processes payments

Making education beyond high school financially accessible to all Californians

Student Enrollment Screen

Allows users to view the student's enrollment information uploaded by the campus.

There are 3 Enrollment Statuses:

- **Blank** = Student was rejected from the Enrollment file, is not awarded, or is not on the roster
- **Pending** = Not processed through the award cycle:
 - The record does not match CSAC's data; or
 - Another campus uploaded an enrollment record for the student
- **Found in Roster** = Student is on MCS roster. Will disallow duplicate entry

Making education beyond high school financially accessible to all Californians

Student Enrollment Screen

CSU SACRAMENTO

SSN	Academic Year 2018	
First Name <input type="text"/>	MI <input type="text"/>	Last Name <input type="text"/>
E-Mail <input type="text"/>	Date of Birth <input type="text"/>	
Education Level <input type="text" value="4th year/senior"/>	Dependent Status <input type="text" value="1 - Dependent"/>	
Student Status <input type="text" value="2 - Continuing"/>	Term Type <input type="text" value="1 - Semester"/>	
ISIR Txn Nbr <input type="text" value="01"/>	Total Income <input type="text" value="58,711"/>	
Federal Award Amount <input type="text" value="0"/>	Institution Aid Amount <input type="text" value="0"/>	
State Award Amount <input type="text" value="0"/>	TCP or 5th Year Program: <input type="text" value="--- SELECT ---"/>	
Upload Date 07/10/2018	Enrollment Status <input type="text" value="Found in Roster"/>	

Making education beyond high school financially accessible to all Californians

Three Award Statuses:

- Awarded
- Financially Ineligible
- Withdrawn (occurs after a student is awarded and on a roster)

Student Not Found (Award Summary screen):

- Rejected Records: Review the MCS Enrollment Process Eligibility Summary Report (search under the week of submission).
- Pended Records: Student was uploaded by another campus or the student's award was rejected due to mismatched data between the enrollment record and CSAC's data.
- An enrollment record was not submitted.

Making education beyond high school financially accessible to all Californians

Corrections

Making education beyond high school financially accessible to all Californians

Annual Level Changes

Annual Level changes affect the student's award. Any change will recalculate the award.

- When reporting state aid at the annual or term level, institutions should EXCLUDE Cal Grant awards. CSAC will factor in Cal Grant awards during the award calculation. Review MCS-CG Sync report.
- When uploading corrections, change field 42 (Transaction Type) of the record layout from "P"- for Payment to "C"- for Correction. When making changes on the roster, select the eligibility drop down to make correction fields active.

Making education beyond high school financially accessible to all Californians

Term Level Changes

A **Term Level** Change is applied when just the term is being adjusted.

- A term can have the following amounts updated: **Tuition/Fees, Federal Aid, Institutional Aid and State Aid**. Any changes to the term will only recalculate the term, not the annual award.
- To reinstate a term-level award, apply a correction and re-key the Tuition/Fees + SAVE

Making education beyond high school financially accessible to all Californians

Payments

Making education beyond high school financially accessible to all Californians

Reporting Payments

There are five payment options available to campuses:

1. FT-(Pay): Applies a payment equal to the term award amount and uses full eligibility
 - o (50%- semester)
 - o (33.33%-quarter)
2. HT-(Pay): Applies a payment equal to the term award amount and uses half-time eligibility
 - o (25%- semester)
 - o (16.67%-quarter)
3. Less Than HT – (Do Not Pay) & Not Enrolled: Applies a \$0 payment but keeps the award intact. No eligibility is used.
4. Refund/Adjusted Payment: Allows a payment less that the term amount to be applied but uses full eligibility, unless a payment of \$0 is applied.
5. Payments and corrections are processed on Tuesday nights and over the weekend. Results can be viewed on Wednesdays and Mondays.

Making education beyond high school financially accessible to all Californians

Payments – Enrollment Status

Transaction Type: Correction <input type="radio"/> Payment <input checked="" type="radio"/>	
FALL TERM	SPRING TERM
Enrollment Status: <input type="text" value="--- SELECT ---"/>	Enrollment Status: <input type="text" value="--- SELECT ---"/>
Term Award Amount [\$822]	Term Award Amount [\$822]
Adj. Reason Code Not Enrolled	Adj. Reason Code --- SELECT ---
Amount Paid/Verified	Amount Paid/Verified
Tuition/Fees [\$2,736]	Tuition/Fees [\$2,736]
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

Making education beyond high school financially accessible to all Californians

Student Payment History

This screen displays all payments and corrections applied to the student record.

CSAC ID		Acad Year		2019 - 2020		Retrieve			
Student Name:				SSN:					
STATUS: AWARDED				CSAC ID:					
Institution Name	Acad Year	Term	Pay Amt	Pay Type	Pay Status	Adj Reason	Elig Used	Date	Created By
UNIV OF CA - DAVIS	2019	AY		C		Eligibility	0.00	09/20/2019	
UNIV OF CA - DAVIS	2019	FL	\$1,292	P	Reconciled		33.33	10/31/2019	

Making education beyond high school financially accessible to all Californians

What causes the recertify?

- A correction was applied at the annual level or term level to a record that has payments.
- Changes to the income, other aid and T/F causes the award to be recalculated.
- The new award overrides the current payment in place with the revised award amount.
- For more information about the recertify process, please see our new training video.

Making education beyond high school financially accessible to all Californians

Tips and Recommendations:

- Reconcile weekly or monthly by utilizing reports (Payment Activity and Student Reconciliation)
- Review recertify payments weekly or monthly (use export function from roster screen)
- Reconciliation deadline: September of each processing year
- Refer to MCS Guide and Roster Layout for specific scenarios

Making education beyond high school financially accessible to all Californians

RESOURCES

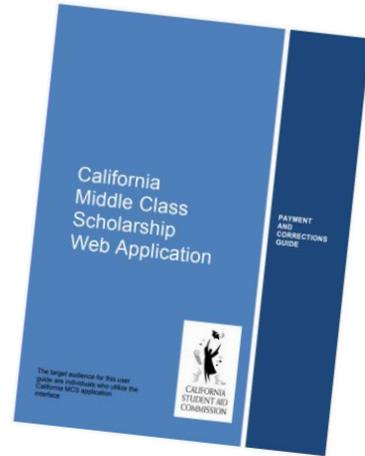
Making education beyond high school financially accessible to all Californians

MCS Resources

The Payment and Corrections Guide contains the following topics:

- Annual and Term-level Changes
- Payment and Correction Scenarios
- Reject Reason codes
- MCS Reports

Coming soon! A new and more comprehensive MCS User Guide will replace the Payment and Corrections Guide. To be announced via List-Serv. Stay tuned!



<https://www.csac.ca.gov/post/middle-class-scholarship-0>

Making education beyond high school financially accessible to all Californians

Do you want to.... Make an impact? Share your great ideas with the financial aid community? Or just stay informed?

Then join the MCS workgroup... or simply get on the distribution list to receive:

- Meeting quarterly invites – actively participate or listen only
- Meeting minutes
- Maximum Award Amounts list
- Updates about system issues

Email schoolsupport@csac.ca.gov to request to be added to the distribution list!

Making education beyond high school financially accessible to all Californians

MCS Reports

WebGrants: [MSC](#)>[MCS](#)- [Data Transfer](#)>[Report Download](#)

Report Type	Media Types	Description
Admission File Report	Data File	Summary information for the Admission file uploaded. Total Number of Records; Accepted & Rejected. Note: Only generates during the Admission file upload timeframe designated by CSAC.
Enrollment File Report	Data File & Report	Contains a list of students who rejected from the Enrollment File. An error code is displayed that begins with "I" for ineligible or "R" for rejected followed by a three digit code that identifies the error (I002, R020, R031). A description of the error is provided in the "Report" format. The Data File format does not provide a description, only the code(s).
Award Rejects Report	Report	Identifies students who were rejected during the award process due to mismatched data between the enrollment information submitted by the campus and CSAC's system. To correct the record, a copy of the student's SSN and CA Driver's License/ID is needed for proof. <ul style="list-style-type: none"> • If CSAC corrects it to match the information in the enrollment file, the student will get picked up in the next award cycle. • If CSAC data is correct, and the enrollment file has the wrong data, then the campus must submit a new enrollment record to match CSAC's data.
Roster File Report	Data File	A listing of the students currently on the schools roster. It holds information related to the record, payments, adjustments, current amounts in place (Award, Income, Tuition/Fee, Other Aid, Eligibility %, Educational Level, TCP/5th Year Flag).

Thank You

Institutional Support

Phone: (888) 294-0153

Fax: (916) 464-6499

SchoolSupport@csac.ca.gov

www.csac.ca.gov

Making education beyond high school financially accessible to all Californians
