Middle Class Scholarship

California Student Aid Commission
Training and Outreach Unit

Making education beyond high school financially accessible to all Californians
A completed, on time, FAFSA or CADAA application is all that is needed to be considered for the Middle Class Scholarship (MCS).

**Middle Class Scholarship**

**Enrollment Requirements:**
- Must be enrolled at a UC, CSU or California Community College Bachelor Degree Program (CCBA)
- Enrolled at least ½ time
- 1\textsuperscript{st} 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 5\textsuperscript{th} year undergraduate programs & Teacher Credentialing programs
- Income ≤ $184,000
- Assets ≤ $184,000

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

**CSU Maximum award amount for 2019-20:** $2,298
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  - If student who is initially withdrawn or financially ineligible becomes eligible, a new enrollment record must be submitted.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)
Awarding Process
Awarding Process

Middle Class Scholarship (MCS) Process Flow

**Student**
- Students/NSLDS or CSOA by deadline
- Application submitted to CSAC
- CSAC Processes application

**CSAC**
- CSAC releases Payment Rules
- Process Payments to Colleges
- Report
- 1. Payment
- 2. Payment Activity
- Student Reconciliation

**Colleges**
- Submit payments to CSAC
- Receive Payment

**Outcomes**
- Withdrawn or Financially ineligible
- Report MSC Financial Aid Compliance Summary
- Report Award Reports
- Report Award Recipients

**Report**
- Steps Awarded
- Student Status

**Institution**
- Institutions submit Request File to corroborate students
- Student identified for check eligibility
- Submit payments & correct files

**CSAC**
- CSAC reviews Payment Rules
- Process Payments to Colleges
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- **Middle Class Scholarship (MCS) Process Flow**
Enrollment Records

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

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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:
  - FAFSA/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)
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
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
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Student Enrollment Screen

CSU SACRAMENTO

First Name: [name]
Last Name: [name]
Education Level: 4th year/senior
Student Status: 2 - Continuing
ISIR Tax No: [number]
Federal Award Amount: [amount]
State Award Amount: [amount]
Total Income: [amount]
Dependent Status: 1 - Dependent
Term Type: 1 - Semester
TCP or 5th Year Program: [select]

Enrollment Status: Found in Roster

Upload Date: 07/10/2018
Awarding Process

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.
### Student Award Summary Screen

#### Awarded:

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>School ID</th>
<th>Award Status</th>
<th>Reported Total Income</th>
<th>Reported Award Amount</th>
<th>Reported Cal Grant Amount</th>
<th>Reported State Award</th>
<th>Reported Federal Grant</th>
<th>Reported Institutional Aid</th>
<th>Fall Award Amount</th>
<th>Winter Award Amount</th>
<th>Spring Award Amount</th>
<th>Total Award Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>00115003</td>
<td>AWARDED</td>
<td>$101,952</td>
<td>$12,000</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$1,149</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$1,298</td>
</tr>
<tr>
<td>2018</td>
<td>00115003</td>
<td>FINANCIALLY INELIG</td>
<td>$81,683</td>
<td>$0</td>
<td>$5,742</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>

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Corrections
• Payments can only be applied to open terms
• If Annual Data is correct, apply payment
• If Annual Data is incorrect, submit a correction prior to applying a payment
• CSAC staff does not have the ability to make changes to student records
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.
Annual Level Changes

Annual-level changes (i.e.; Total Income, Other Aid) should precede Term-level changes or payment transactions.

The following data values will withdraw the student from the roster, if no payments exist:

- Post Bacc
- SAP
- Not Enrolled
- Other
- Over Asset Ceiling
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.
Term Level Correction

The Adj. Reason Code field provides two options when making changes to the term. Selecting the Correction radio button displays these options:

- **Eligibility** is used when making changes to the “other aid” amounts: Federal Aid, Institutional Aid and State Aid
- **Fees** is used when making changes to the Tuition/Fees amount

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Correction</th>
<th>Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>FALL TERM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Status</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Term Award Amount</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adj. Reason Code</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amount Paid/Refunded</td>
<td>Eligibility</td>
<td></td>
</tr>
<tr>
<td>Balance Due</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Aid</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Aid (ID)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Institutional Aid (ID)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>State Aid</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payment Status</td>
<td>Re/Canceled</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SPRING TERM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrollment Status</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Term Award Amount</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adj. Reason Code</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amount Paid/Refunded</td>
<td>Fees</td>
<td></td>
</tr>
<tr>
<td>Balance Due</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Aid</td>
<td></td>
<td></td>
</tr>
<tr>
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<td></td>
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</tr>
<tr>
<td>State Aid</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payment Status</td>
<td>Re/Canceled</td>
<td></td>
</tr>
</tbody>
</table>

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The Payment radio button allows the user to apply an Adjustment Reason Code to indicate term ineligibility; or to post a Refund/Adjusted Payment to the term:

- Selecting Post Bacc, SAP or Other are *ineligible statuses*. This will zero out the term award and apply a $0 payment.
- Refund/Adjusted Payment is used to post a payment less than the term award.
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
   - (50%- semester)
   - (33.33% - quarter)

2. **HT-(Pay):** Applies a payment equal to the term award amount and uses half-time eligibility
   - (25%- semester)
   - (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.**
Payments – Enrollment Status

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Student Payment History

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

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Recertify Payments

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.

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_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
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Roster – Red Brackets

The red font in brackets displays the most current term-level information. This consists of the payment and adjustment types, Tuition/Fees, Federal Aid, Institutional Aid and State Aid.

<table>
<thead>
<tr>
<th>FALL TERM</th>
<th>WINTER TERM</th>
<th>SPRING TERM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment Status</td>
<td>Select</td>
<td>Select</td>
</tr>
<tr>
<td>Term Award Amount (in $)</td>
<td>Select</td>
<td>Select</td>
</tr>
<tr>
<td>Adj. Reason Code</td>
<td>Select</td>
<td>Select</td>
</tr>
<tr>
<td>Amount Paid/Identified (in $)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tuition/Fees (in $)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Aid (in $)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Institutional Aid (in $)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>State Aid (in $)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payment Status: Unenrolled</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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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
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
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!

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## MCS Reports

### WebGrants: MSC>MCS- Data Transfer>Report Download

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Media Types</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admission File Report</td>
<td>Data File</td>
<td>Summary information for the Admission file uploaded. Total Number of Records; Accepted &amp; Rejected. Note: Only generates during the Admission file upload timeframe designated by CSAC.</td>
</tr>
<tr>
<td>Enrollment File Report</td>
<td>Data File &amp; Report</td>
<td>Contains a list of students who rejected from the Enrollment File. An error code is displayed that begins with &quot;I&quot; for ineligible or &quot;R&quot; for rejected followed by a three digit code that identifies the error (I002, R020, R031). A description of the error is provided in the &quot;Report&quot; format. The Data File format does not provide a description, only the code(s).</td>
</tr>
<tr>
<td>Award Rejects Report</td>
<td>Report</td>
<td>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. • 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.</td>
</tr>
<tr>
<td>Roster File Report</td>
<td>Data File</td>
<td>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).</td>
</tr>
</tbody>
</table>
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<th>Report Type</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Accept/Reject Report</td>
<td>Data File</td>
<td>A list of students who had payments or corrections applied during the week. The report is broken down into three sections: Exception, Rejected and Accepted.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Exception Section</strong> = This occurs when the system cannot define the type of transaction being applied. The <em>txn</em> is invalid or there is no valid <em>txn</em> in the file for the record. The majority of record in this section are from attempts to apply a payment &amp; correction to the same student within the same file or week.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Rejected Section</strong> = The payment or correction was rejected due to an edit in place for the <em>txn</em>. Many times the information being submitted is not in a correct format.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Accepted Section</strong> = The payment or correction was accepted and applied to the student’s record.</td>
</tr>
<tr>
<td>Payment Activity Report</td>
<td>Report</td>
<td>A summary of payments made to institutions, reconciled payment transactions, amount of funds disbursed to institutions, payment transactions and balances. Including a summary of the Year-to-Date activity.</td>
</tr>
<tr>
<td>MCS CG Sync Report</td>
<td>Report</td>
<td>A listing of students who went through the MCS-Cal Grant data match process. It provides a summary of the students Cal Grant and MCS awards before and after the process ran. A summary of the students eligibility status is also provided.</td>
</tr>
<tr>
<td>Student Reconciliation Report</td>
<td>Data File &amp; Report</td>
<td>A summary of reconciled payments greater than $0 (to date). Payments with an existing adjustment reason code are not listed in the report.</td>
</tr>
</tbody>
</table>
Thank You

Institutional Support
Phone: (888) 294-0153
Fax: (916) 464-6499
SchoolSupport@csac.ca.gov
www.csac.ca.gov