2015-2016 California Middle Class Scholarship (MCS) Web Application

The target audience for this user guide is individuals who utilize the CA Middle Class Scholarship web application interface.

PAYMENT AND CORRECTIONS GUIDE

CALIFORNIA STUDENT AID COMMISSION

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REVISION HISTORY

Date	Version #	Document Change
09/09/2015	.01	Draft version created.
2/16/2016	.02	Draft version reviewed
2/22/2016	.03	Final 2015 version

INTRODUCTION

This user guide contains all essential information for the readers to understand the *MCS Payment-Correction Process* for the 2015-2016 version of the MCS web application.

The purpose of the guide is to describe the functions and include supporting graphics to depict the end-user's interactions and the application's behavior.

1.1   SCOPE

The scope of the document is a high-level overview of the features that have been developed and deployed with this version of the software release. This document is not a comprehensive user manual. This document is not intended to supersede any of the processes, procedures and/or policies that are currently in place for the MCS program.

1.2   SYSTEM REQUIREMENTS

The web application is designed for use with the following web browsers:

- Microsoft Internet Explorer version 10.0 or higher
- Mozilla Firefox version 29.0.1 or higher
- Google Chrome version 35.0.1916.114 or higher
- Apple Safari version 5.1.9 or higher

The computer should also meet the minimum system requirements provided by the manufacturer of the browser being used. The web application will perform best on computers with a high-speed internet connection similar to Digital Subscriber Line (DSL), cable, or faster. It is not recommended for use with computers using dial-up modem based internet connection.

Note: The *MCS Payment-Correction File* **must** be a fixed field length text file with an encoding of **ANSI** and shall **not** exceed 25MB.

1.3   ACCESSIBILITY REQUIREMENTS

To access the MCS web application, you **must** have a WebGrants user account. If you do **not** have a WebGrants user account, contact your WebGrants *System Administrator*. If your school does not have a *System Administrator,* contact the CSAC Help Desk at 1-888-294-0148 or by email at: csachelpdesk@csac.ca.gov to request an account.

MCS PAYMENT GUIDELINES

2.1 INTRODUCTION:

The second phase of the MCS process requires the transmission of student enrollment data to CSAC through the WebGrants system.   The financial aid eligibility data included in the enrollment files will allow CSAC to determine the maximum MCS award amounts for eligible students.

Awarded MCS students can view their award information on WebGrants for Students. These students will also be accessible to campuses via an online MCS roster as well as a   Roster File download report.

There are two ways to submit a payment and/or correction: by *Batch Upload* (Section 2.3. Uploading the *MCS Payment-Correction File*) or by *Online Payment Roster* (Section 2.4. Using the Online Payment Roster). CSAC will process the uploaded payment-correction files every Friday night and update all MCS records the following week. The delivery of funds is expected on a weekly basis, approximately one week after payments are processed.

2.1.1. ASSUMPTIONS:

To complete the MCS Payment-Correction process, the following assumptions have been made:

- The reporting individual has a valid WebGrants user account
- The reporting individual has access to the MCS menu
- The reporting individual has valid MCS Data to report
- The reporting individual has a valid MCS Payment-Correction File to upload

2.2. MCS FILE ELEMENTS AND PROCESSING:

As campuses prepare to request MCS payments and corrections, the following sections below provide guidance on the relevant fields to verify.

Field 9, ISIR/Cal ISIR Transaction Number:

- Used for Financial Aid determination

Field 10, Student's Dependency Status:

- Dependent
- Independent

Field 11, Total Income:

- $150,000 or less

Field 12, Student's Federal Aid:

- Pell Grant
- FSEOG
- Teach Grant
- BIA Grants

Field 13, Student's Institutional Grants and Fee Waivers:

- Need-based grants
- Merit based scholarships, including athletic scholarships, **the portion of which** is specifically designated for tuition and fees
- Mandatory fee waivers such as Alan Pattee
- Veteran's benefits designated for mandatory system wide tuition and fees
- Other fee waivers (Vocational rehabilitation, employee tuition assistance, etc.)
- EOP
- Institutionally administered scholarships specifically designated for fees

Field 14, Student's State Aid (Do not include Cal Grant Awards):

- Chafee Grant
- Child Development Grant
- LEPD
- National Guard

Field 21, Fall MCS Award Payment

Field 28, Winter MCS Award Payment

Field 35, Spring MCS Award Payment

NOTE: Cal Grants are considered when determining MCS eligibility but are not reported by the school, CSAC will verify Cal Grant award values during the awarding process.
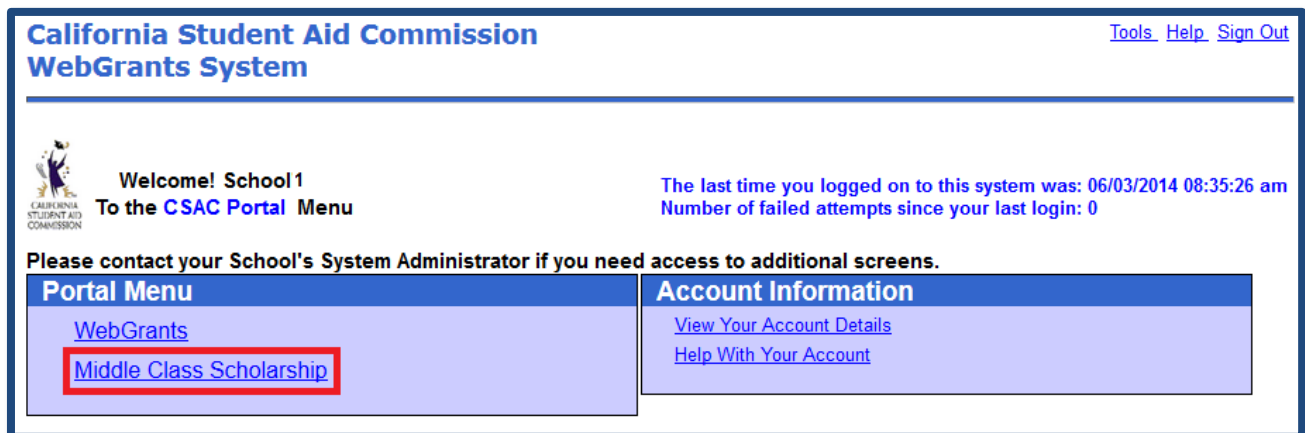
2.3 UPLOADING THE MCS PAYMENT-CORRECTION FILE:

1. Navigate to the WebGrants System login page.
   - This is the entry point through which all authorized users can access the WebGrants application.
2. Enter the *User Name* and *Password* and select the *Sign-in* button.

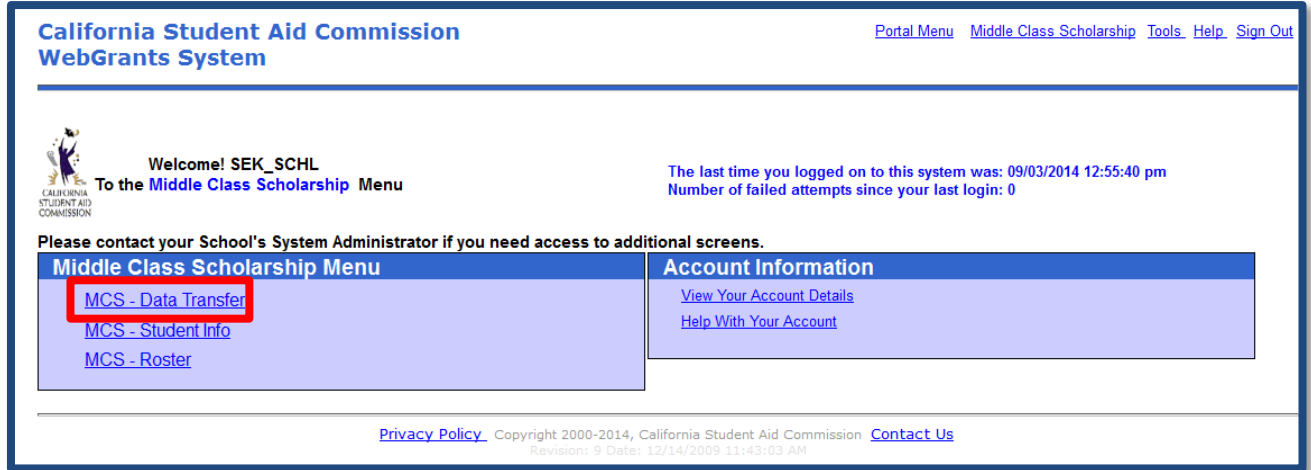<div align="right">**WebGrants System – Login Screen**</div>

3. The system will display the *CSAC Portal Menu* screen upon successfully authenticating the login credentials.
   - **Note:** Depending on the profile authorization, there may be more options available in the *CSAC Portal Menu*.
4. Select the *Middle Class Scholarship* menu selection.

<div align="right">**WebGrants System – CSAC Portal Menu**</div>

5. The system will display the *Middle Class Scholarship Menu* screen.

6. Select the "MCS – Data Transfer" option.

7. The system will display the *MCS – Data Transfer Menu* screen.

MCS Payment File - Data Transfer Menu

8. Select the File Upload menu selection.

9. The system will display the *MCS File Upload* screen.

10. If requested, enter the *School ID*, select the *Academic Year* and select the *File Type.* Under *File Type*, select "Payment".

11. Select the *File* to upload by selecting the *Browse* button.

12. Select the *Upload* button.

File Upload

- File Type must be .txt.
- Enter the file path and name of your file (Use the Browse button to find your file).
- Click the Upload button to start this operation.
- If the file validation fails, no data will be uploaded. Please correct error and upload.
- Please ensure your file encoding is ANSI.

| School ID | 00115000 | Acad Year | 2015 - 2016 ▾ | File Type | Payment ▾ |

Select File [Browse...] No file selected.   [Upload]

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<div align="right">

MCS Payment File – File Upload Screen

</div>

13. If the *Academic Year*, *File Type*, and *File* are not selected, the system will display an exception message.

14. Select the *OK* button.

15. The system will display the *MCS File Upload* screen.

16. Select the *Academic Year*, *File Type* and *File* to upload.

MCS Application

We noticed the following error(s):

- Please select academic year.
- Please select file type.
- Please select a file to upload.

[OK]

<div align="right">

MCS Payment File– File Upload – File Upload Exception Message

</div>

17. If the file type does not comply with file format requirements, the system will display an exception message.

- **Note:** The file format **must** be a **fixed field length text file** with an encoding of **ANSI** and shall **not** exceed 25MB

18. Select the *OK* button.

19. The system will display the *MCS File Upload* screen.

20. Correct the *File Format* so that it complies with the requirements.

21. Select the corrected file to re-upload.
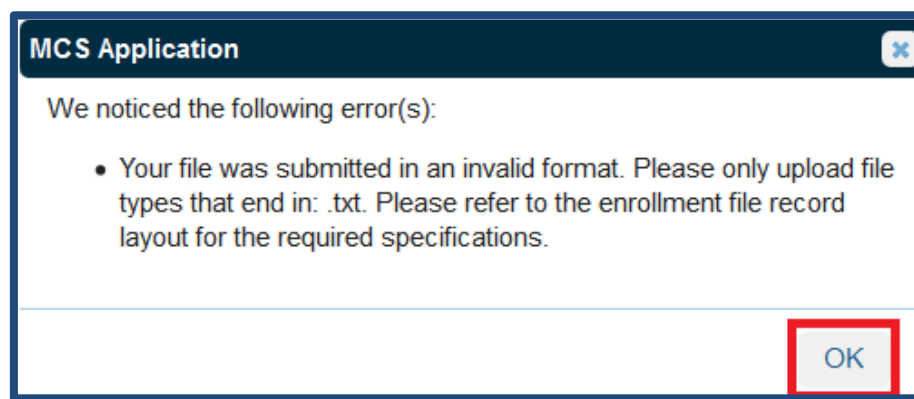
MCS Payment File– File Upload – File Format Exception Message

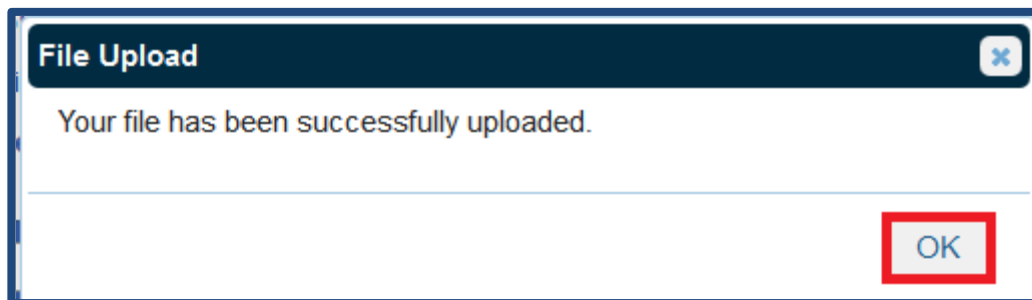22. If the file passes the file format validation, the system will display the *MCS Successful Upload* dialogue box.

23. Select the *OK* button.

MCS Payment File – File Upload – Successful Upload Message

24. The system will display the *MCS File Upload Status* embedded panel which provides a high level overview of the file status.

   • **Note:** There are no invalid records for this file.

File Upload

- File Type must be .txt.
- Enter the file path and name of your file (Use the Browse button to find your file).
- Click the Upload button to start this operation.
- If the file validation fails, no data will be uploaded. Please correct error and upload.
- Please ensure your file encoding is ANSI.

| School ID | 00115000 | Acad Year | 2015 - 2016 | File Type | Payment |

Select File [Browse...] No file selected.   [Upload]

File Upload Status

File Name:	MCSP-2015-00115000-VALID.TXT
File Size:	0.69 KB
Academic Year:	2015 - 2016
File Header:	OK
File Footer:	OK
Total Records:	1
Valid Records:	1
Invalid Records:	0

MCS Payment File – File Upload – Successful Upload – File Upload Status

25. If the file fails field level validation, the system will reject the file and display an exception message. The file **must** be corrected and the **entire file** must be **uploaded** again.

26. Select the *OK* button.

File Upload

File validation has failed. Please correct errors and upload entire file again.

[OK]

MCS Payment File – File Upload – Validation Failure Exception Message

27. The system will display the *File Upload Status* embedded panel which provides a high level overview of the file status.

28. Review the file status details.

29. The system will display the *Get Error Report* button **only** when invalid records are discovered in the file.

30. Select the *Get Error Report* button.

File Upload

- File Type must be .txt.
- Enter the file path and name of your file (Use the Browse button to find your file).
- Click the Upload button to start this operation.
- If the file validation fails, no data will be uploaded. Please correct error and upload.
- Please ensure your file encoding is ANSI.

| School ID | 00114300 | Acad Year | 2015 - 2016 | File Type | Payment |

Select File Browse... No file selected. Upload

File Upload Status

File Name:	MCSP-2015-00114300-INVALID.TXT
File Size:	0.92 KB
Academic Year:	2015 - 2016
File Header:	OK
File Footer:	Error
Total Records:	2
Valid Records:	0
Invalid Records:	2

Get Error Report

MCS Payment File– File Upload – File Upload Status – Invalid Records

31. The system will display the *MCS Payment File Format Exception Report* dialogue box.

32. Select the *OK* button.
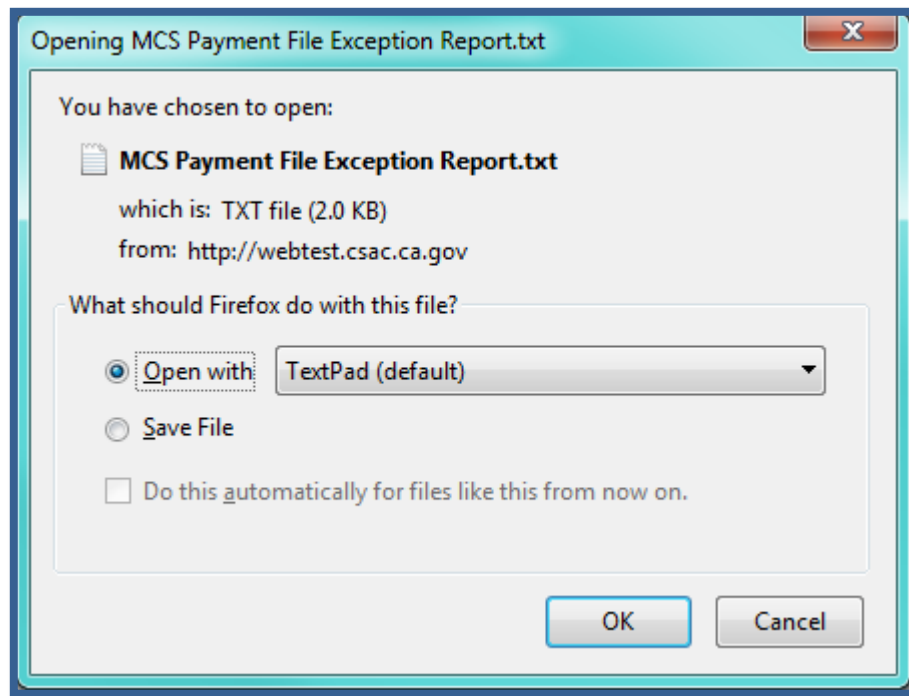
MCS Payment File– File Upload – Validation Error Report Dialogue Box

33. The system will display the *MCS Payment File Format Exception Report* which provides the details of the errors for each of the invalid records.

34. Correct the invalid records in the file and resubmit the **entire** file.

MCS Payment File – File Upload – Validation Error Report

2.4 USING THE ONLINE PAYMENT ROSTER:

1. Navigate to the WebGrants System login page.

    i. This is the entry point through which all authorized users can access the WebGrants application.

2. Enter the *User Name* and *Password* and select the *Sign-in* button.

3. The system will display the *CSAC Portal Menu* screen upon successfully authenticating the login credentials.

- **Note:** Depending on the profile authorization there may be more options available in the *CSAC Portal Menu*.

4. Select the *Middle Class Scholarship* menu selection.

California Student Aid Commission
WebGrants System

Tools Help Sign Out

Welcome! School 1
To the **CSAC Portal** Menu

The last time you logged on to this system was: 06/03/2014 08:35:26 am
Number of failed attempts since your last login: 0

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

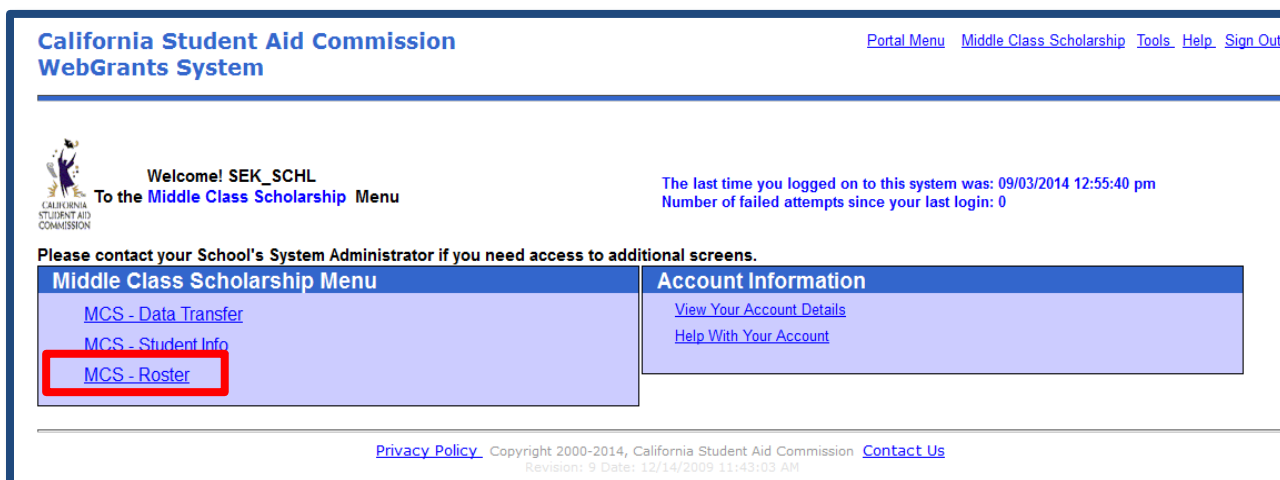| Portal Menu	Account Information
WebGrants	View Your Account Details
Middle Class Scholarship	Help With Your Account

WebGrants System – CSAC Portal Menu

5. The system will display the *Middle Class Scholarship Menu* screen.

6. Select *MCS – Roster*.

California Student Aid Commission
WebGrants System

Portal Menu   Middle Class Scholarship   Tools Help Sign Out

Welcome! SEK_SCHL
To the **Middle Class Scholarship** Menu

The last time you logged on to this system was: 09/03/2014 12:55:40 pm
Number of failed attempts since your last login: 0

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

Middle Class Scholarship Menu	Account Information
MCS - Data Transfer	View Your Account Details
MCS - Student Info	Help With Your Account
MCS - Roster	

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Revision: 9 Date: 12/14/2009 11:43:03 AM

WebGrants System – Middle Class Scholarship Menu

7. The system will display the *MCS – Roster Menu* screen.

8. Select *MCS Display Roster*.

WebGrants System – Middle Class Scholarship Menu – MCS – Roster Menu

9. The system will display the *Middle Class Scholarship – School Roster* screen.

10. Select the *School ID*, *Acad Year* and enter a *Search ID* (either SSN or CSAC ID) or enter the *First Name* or *Last Name* to search.

MCS – Roster Menu – Middle Class Scholarship – School Roster

11. Click the *Search* button.

12. The system will generate a list of the search results. Click on a row to access the student's roster information.

MCS – Roster Menu – Middle Class Scholarship – School Roster

13. The system will generate an error message if the *SSN/CSAC ID, First Name* or *Last Name* is missing and/or the search criteria is invalid.

MCS – Roster Menu – Middle Class Scholarship – School Roster – MCS Missing Error Screen

14. The system will display the *Middle Class Scholarship – Online Payment Roster*, showing *Demographic Information*, *Annual Data* and *Term* level data.

Middle Class Scholarship - Online Payment Roster

Demographic Information

CSAC ID:

SSN No: XXX - XX - 5974

DOB:

Cal Grant Award: $0

Annual Award: $2,448

Annual Tuition/Fees: $12,240

Asset Amount: $0

TCP Indicator:

Annual Data

Open Terms:	Fall, Winter, Spring	
Total Income:	$39,544	
Federal Aid:	$0	
Institutional Aid:	$0	
State Aid:	$0	
ISIR Tran #:	02	
Eligibility Change:	--- SELECT ---	**Payment History**

Transaction Type: Correction ○ **Payment** ○

FALL TERM	WINTER TERM	SPRING TERM
Enrollment Status: --- SELECT ---	Enrollment Status: --- SELECT ---	Enrollment Status: --- SELECT ---
Term Award Amount [$816] — $816	Term Award Amount [$816] — $816	Term Award Amount [$816] — $816
Adj. Reason Code --- SELECT ---	Adj. Reason Code --- SELECT ---	Adj. Reason Code --- SELECT ---
Amount Paid/Verified	Amount Paid/Verified	Amount Paid/Verified
Tuition/Fees [$4,080]	Tuition/Fees [$4,080]	Tuition/Fees [$4,080]
Federal Aid [$0]	Federal Aid [$0]	Federal Aid [$0]
Institutional Aid [$0]	Institutional Aid [$0]	Institutional Aid [$0]
State Aid [$0]	State Aid [$0]	State Aid [$0]
Payment Status: **Not Reconciled**	Payment Status: **Not Reconciled**	Payment Status: **Not Reconciled**

Save   Back   Reset

MCS – Roster Menu – Middle Class Scholarship – School Roster – Online Payment Roster

15. Verify the *Demographic Information* and *Annual Data.*

16. If the student's annual data is incorrect, submit a *Correction* first rather than a payment.

17. If the student's annual data is correct, proceed with applying a payment.

18. Click on the *Payment* radio button, under *Fall Term*, select the *Enrollment Status* of the student: Half-time or more (Pay), Less than Half-time (Do Not Pay) or Not Enrolled. Only students attending Half-time or more will qualify for a payment.

Demographic Information

CSAC ID:

SSN No: XXX - XX - 5974

DOB:

Cal Grant Award: $0

Annual Award: $2,448

Annual Tuition/Fees: $12,240

Asset Amount: $0

TCP Indicator:

Annual Data

Open Terms:	Fall, Winter, Spring
Total Income:	$39,544
Federal Aid:	$0
Institutional Aid:	$0
State Aid:	$0
ISIR Tran #:	02
Eligibility Change:	--- SELECT ---

Payment History

Transaction Type: Correction ○ Payment ●

FALL TERM		WINTER TERM		SPRING TERM	
Enrollment Status:	--- SELECT ---	Enrollment Status	--- SELECT ---	Enrollment Status	--- SELECT ---
	--- SELECT ---				
	HT or more- (Pay)				
Term Award Amount [$816]	Less Than HT - (Do Not Pay)	Term Award Amount [$816]	$816	Term Award Amount [$816]	$816
	Not Enrolled				
Adj. Reason Code	--- SELECT ---	Adj. Reason Code	--- SELECT ---	Adj. Reason Code	--- SELECT ---
Amount Paid/Verified		Amount Paid/Verified		Amount Paid/Verified	
Tuition/Fees [$4,080]		Tuition/Fees [$4,080]		Tuition/Fees [$4,080]	
Federal Aid [$0]		Federal Aid [$0]		Federal Aid [$0]	
Institutional Aid [$0]		Institutional Aid [$0]		Institutional Aid [$0]	
State Aid [$0]		State Aid [$0]		State Aid [$0]	
Payment Status:	Not Reconciled	Payment Status:	Not Reconciled	Payment Status:	Not Reconciled

Save   Back   Reset

MCS – Roster Menu – Middle Class Scholarship – School Roster – Online Payment Roster

19. Once the student's *Enrollment Status* has been selected, the system will automatically   populate the Amount Paid/Verified field under *Fall Term* with the payment amount.

20. If the *Enrollment Status* and payment amount is correct, click on the *Save* button to apply the payment(s).

21. After you click *Save*, the system will generate a pop-up box confirming the transaction has been saved. Click "OK" to proceed.

DELETE BUTTON:

22. If you made a mistake and would like to delete the transaction, pull up the student's roster record again and click on the *Payment* radio button. The *Delete* button will appear in order to proceed with deleting the transaction.

- The delete button will only appear on a roster where a transaction has been submitted, but not reconciled. This is indicated by the Payment Status at the bottom of each term. The Payment Status will display as "Not Reconciled" in red lettering.

Demographic Information		Annual Data	
CSAC ID:	▮	Open Terms:	Fall, Winter, Spring
SSN No:	XXX - XX - 5974	Total Income:	$39,544
DOB:	▮	Federal Aid:	$0
Cal Grant Award:	$0	Institutional Aid:	$0
Annual Award:	$2,448	State Aid:	$0
Annual Tuition/Fees:	$12,240	ISIR Tran #:	02
Asset Amount:	$0	Eligibility Change:	--- SELECT ---
TCP Indicator:			Payment History

Transaction Type: Correction ○ Payment ●   [Delete]

FALL TERM		WINTER TERM		SPRING TERM	
Enrollment Status:	HT or more- (Pay)	Enrollment Status	--- SELECT ---	Enrollment Status	--- SELECT ---
Term Award Amount [$816]	$816	Term Award Amount [$816]	$816	Term Award Amount [$816]	$816
Adj. Reason Code	--- SELECT ---	Adj. Reason Code	--- SELECT ---	Adj. Reason Code	--- SELECT ---
Amount Paid/Verified	$816	Amount Paid/Verified		Amount Paid/Verified	
Tuition/Fees [$4,080]		Tuition/Fees [$4,080]		Tuition/Fees [$4,080]	
Federal Aid [$0]		Federal Aid [$0]		Federal Aid [$0]	
Institutional Aid [$0]		Institutional Aid [$0]		Institutional Aid [$0]	
State Aid [$0]		State Aid [$0]		State Aid [$0]	
Payment Status:	Not Reconciled	Payment Status:	Not Reconciled	Payment Status:	Not Reconciled

23. After you click Delete, the system will generate a confirmation message. Click *OK* to proceed.

MCS Roster - Delete Transaction

Are you sure you want to delete the transaction

OK   Cancel

MCS – Roster Menu – Middle Class Scholarship – School Roster – Online Payment Roster – Confirmation Message

RESET BUTTON:

24. The system will return you to the *Middle Class Scholarship – School Roster* screen.

25. Selecting the "Reset" button will remove any data that you have entered, prior to saving the transaction.

Transaction Type: Correction ○ Payment ●

FALL TERM	WINTER TERM	SPRING TERM
Enrollment Status: HT or more- (Pay)	**Enrollment Status** HT or more- (Pay)	**Enrollment Status** --- SELECT ---
Term Award Amount [$816] $816	**Term Award Amount** [$816] $816	**Term Award Amount** [$816] $816
Adj. Reason Code --- SELECT ---	**Adj. Reason Code** --- SELECT ---	**Adj. Reason Code** --- SELECT ---
Amount Paid/Verified $ 816	**Amount Paid/Verified** $ 816	**Amount Paid/Verified**
Tuition/Fees [$4,080]	**Tuition/Fees** [$4,080]	**Tuition/Fees** [$4,080]
Federal Aid [$0]	**Federal Aid** [$0]	**Federal Aid** [$0]
Institutional Aid [$0]	**Institutional Aid** [$0]	**Institutional Aid** [$0]
State Aid [$0]	**State Aid** [$0]	**State Aid** [$0]
Payment Status: Not Reconciled	**Payment Status:** Not Reconciled	**Payment Status:** Not Reconciled

Save   Back   Reset

BACK BUTTON:

26. Selecting the "Back" button will return you to the list of students under the main MCS School Roster screen.

MCS CORRECTION PROCESS GUIDELINES

3.1 INTRODUCTION:

The *MCS Correction* process is required to be used to update student award information. Due to the limited funding available, CSAC must recalculate each student's award and provide any revised award values to the campus. The process of submitting corrections will allow CSAC to maintain and monitor the funding level each year, and ensure the program is not over subscribed. The two methods that will be available to submit corrections are the batch file upload process and the Online Payment Roster screen functionality.

3.1.1 ASSUMPTIONS:

To complete the process of submitting the *MCS Payment-Correction File*, the following assumptions have been made:

- The individual submitting corrections has a valid WebGrants user account.
- The individual submitting corrections has access to the MCS Menu.
- The student who is having a correction applied has an existing *MCS* award for the academic year.

3.2 MCS CORRECTION PROCESS GENERAL GUIDELINES:

When a student has been awarded the MCS, but new information is available that may affect the student's eligibility or award, the campus must follow the correction process in order to have CSAC recalculate that student's award. In general, the following hierarchy of changes should be applied:

1) Annual level changes, such as a student's total income, should be submitted before term level changes or payment transactions.

2) Term level changes, such as a student's tuition and fees, should be submitted before payment transactions.

a. Term level corrections can only be made for terms that are currently open. For example, in September 2015, a campus will only be able to submit changes for Fall 2015 since the Winter and Spring terms will be closed.

3) Payment transactions should only be applied once a student's award information has been verified as accurate.

Campus staff may utilize either of the following methods to submit corrections to awarded MCS students:

1) Batch File Upload Process

2) Online Payment Roster Screen

Both methods will be reconciled during the week-end processing. Changes will be available the following Monday.

3.3 MCS CORRECTION BATCH FILE UPLOAD:

Uploading correction records for MCS follows the same process as 2.3 – Uploading the MCS Payment File. When uploading corrections, a campus will use the "MCS Payment File" to do so. Within the file record layout, field 42 would be changed from a "P" – for payment to a "C" – for correction.

General Rules for uploading corrections via the payment file:

1) Correction and Payment transactions may be submitted within the same file, **but not for the same record**.

2) When submitting a correction for a student, you may only submit an Annual level correction **OR** a Term level correction within the same file. An Annual and Term level correction cannot be submitted for the same student record in the same file.

    a. When possible, please follow the correction process hierarchy to determine which correction to submit first (3.2).

    b. Multiple term level corrections are allowed within the same week.

3) Corrections may only be submitted for "open" terms.

3.3.1 CORRECTION FIELDS:

When submitting corrections via a batch file upload, the following fields may be modified to indicate a student's MCS award should be recalculated:

Annual Level Changes:

Should be performed when the campus has updated information on total income, federal financial aid, institutional aid and state aid that could potentially impact the student's MCS award eligibility and amount. When annual level corrections are submitted, CSAC will recalculate the student's MCS award during the weekly process and update the MCS roster accordingly the following Monday.

Field #11 – Total Income: Only provide a value in this field if you are submitting a correction to previously reported Total Income. In addition to submitting a value in field 11, a value of "3" should be submitted in field 41 (noting a change in eligibility), and a value of "C" should be reported in field 42 (noting the Transaction Type as a "correction").

Following the processing of the new total income value, the student will be re-evaluated for their MCS award. If the student remains eligible, and their award value has gone up or down, new information will be available to the campus the following Monday. If the change in total income results in a student no longer being eligible for their MCS award, the student will be removed from the roster.

Field #12 – Student's Federal Aid: Only provide a value in this field if you are submitting a correction to previously reported Federal Aid. In addition to submitting a value in field #12, a value of "3" should be submitted in field 41 (noting a change in eligibility), and a value of "C" should be reported in field 42 (noting the Transaction Type as a "correction").

Following the processing of the new student's Federal Aid, the student will be re-evaluated for their MCS award. If the student remains eligible, and their award value has gone up or down, new information will be available to the campus the following Monday. If the change in Federal Aid results in a student no longer being eligible for their MCS award, the student will be removed from the roster.

Field #13 – Student's Institutional Grants and Fee Waivers: Only provide a value in this field if you are submitting a correction to previously reported Institutional Grants and Fee Waivers. In addition to submitting a value in field #13, a value of "3" should be submitted in field 41 (noting a change in eligibility), and a value of "C" should be reported in field 42 (noting the Transaction Type as a "correction").

Following the processing of the new student's Institutional Grants and Fee Waivers, the student will be re-evaluated for their MCS award. If the student remains eligible, and their award value has gone up or down, new information will be available to the campus on the following Monday. If the change in Institutional Grants and Fee Waivers results in a student no longer being eligible for their MCS award, the student will be removed from the roster.

Field #14 – Student's State Aid: Only provide a value in this field if you are submitting a correction to previously reported State Aid. In addition to submitting a value in field #14, a value of "3" should be submitted in field 41 (noting a change in eligibility), and a value of "C" should be reported in field 42 (noting the Transaction Type as a "correction").

Following the processing of the new student's State Aid, the student will be re-evaluated for their MCS award. If the student remains eligible, and their award value has gone up or down, new information will be available to the campus the following Monday. If the change in State Aid results in a student no longer being eligible for their MCS award, the student will be removed from the roster.

Field #41 – Eligibility Change (for Academic Year): This field is always used when making corrections at an annual level. If there is a value provided in this field, then a value of "C" should be reported in field 42 (noting the Transaction Type as a "correction").

If the data value submitted is 1, 2, 4, 5 or 7 (Post Bacc, SAP, Not Enrolled, Other or Over Asset Ceiling) and a payment exists for this student, the school is responsible for determining whether or not the student should have received all or part of the payment. The school shall address the payment change **PRIOR** to submitting the annual level "Eligibility Change." By submitting one of these values, the student is considered no longer eligible for the MCS award unless other information is received by CSAC. The student's MCS award will be withdrawn, and the student will be removed from the roster.

If the data value submitted is 3 (Eligibility), then the school is required to provide one or more values in fields 11 through 14 (Total Income, Federal Aid, Institutional Aid, State Aid). CSAC will use that new information to recalculate the student's award. If no new value is provided in one of the additional fields, then the recalculation will be performed using the existing values previously submitted.

If the data value submitted is 8 (Add TCP), CSAC will recalculate the student's award amount at the annual level using the stored TCP amount designated for the segment type.

If the data value submitted is 9 (Remove TCP), CSAC will recalculate the student's award amount at the annual level using the standard Tuition/Fees amount for the segment type.

Annual Level Corrections – When Payments are Reconciled:

If a school submits a **data value of 1, 2, 4, 5 or 7** (Post Bacc, SAP, Not Enrolled, Other or Over Asset Ceiling) and a payment exists for this student, the school is responsible for determining whether or not the student should have received all or part of the payment. The school must address the payment change **PRIOR** to submitting the annual level "Eligibility Change." By submitting one of these values, the student is considered no longer eligible for the MCS award unless other information is received by CSAC. The student's MCS award will be withdrawn, and the student will be removed from the roster.

If the **data value submitted is a 3**, **8 or 9** (Eligibility, Add TCP or Remove TCP) and a payment exists for this student, the award will be recalculated and the school will be required to recertify the payment amount.

NOTE: This includes records where the eligibility change or recalculation process results in the student no longer being eligible for MCS Award consideration. In these cases, the student's MCS award will be set to $0.00, and the school will be required to recertify the $0.00 payment amount. After the recertification takes place, the student will be removed from the school's roster.

Term Level Changes:

These changes should be performed when the campus needs to update information on a specific term's tuition, federal financial aid, institutional aid and state aid. CSAC will recalculate the student's MCS award for that term only during the weekly process and update the MCS roster accordingly the following Monday. After the recalculation, the term amounts may not equal since a specific term was re-evaluated. However, the sum of all terms amount will equal the annual MCS award amount.

Field #22/29/36 – Fall/Winter/Spring Adjustment Reason Code: Used to indicate term adjustment reasons. Valid content includes numeric values 1-8.

If the school provides a value of **3 or 4 (Eligibility or Fees)** in this field, then a value of "C" must also be submitted in field 42 (Transaction Type) of this file. If not, then the record will be rejected. If selecting 3 or 4, values must also be reported in fields 23-26/30-33/37-40. CSAC will use the new reported information to recalculate the student's award for the applicable term. The Annual Award Amount will be adjusted to reflect the new term amount.

If the school provides a value of **1, 2, 5 or 7 (Post Bacc, SAP, Refund/Adjusted Payment or Other)** in this field, then a value of "P" must also be submitted in field 42 (Transaction Type) of this file. If not, then the record will be rejected.

If the school submits a value of **1, 2, or 7, (Post Bacc, SAP or Other)**, then the school must also submit a value of zero in field 21/28/35 (Fall/Winter/Spring MCS Award Payment) indicating that the student should not be paid for the Fall/Winter/Spring term, but should remain on their roster.

If a payment has already been made for this student, the difference between the previous payment amount and the "zero" payment amount will be taken into consideration during the school reconciliation process.

If the school submits a value of **8 (Teacher Credential Program Flag)** in this field, then a value of "C" must also be submitted in field 42 (Transaction Type) of this file. If not, then the record will be rejected. CSAC will use the value of 8 as the student being enrolled in the Teacher Credential Program for the Fall/Winter/Spring term. The student's Fall/Winter/Spring term award will be recalculated using the stored TCP amount for the segment type.

NOTE: If a payment has already been made for this student, the school will be required to recertify the student's MCS payment amount.

In order to **remove** the value of **8 (Teacher Credential Program Flag)**, schools must use the value of **4 (Fees)** and will also be required to submit the **Tuition/Fee Amount** for the Fall/Winter/Spring term (field 23/30/37); along with submitting a value of "C" in field 42 (Transaction Type). The other aid fields may also be submitted when updating the Tuition/Fee amount but they are not required to complete the removal of the TCP Flag.

NOTE: If the Tuition/Fee is not updated with the campus standard amount, the higher Tuition/Fees amount will remain on the student's record.

Field #23/30/37 – Fall/Winter/Spring Tuition/Fee Amount: Used to adjust a student's term specific Tuition/Fee amount.

CSAC will provide a value in this field based on the reported tuition and fees for UC and CSU campuses. The annual value is then divided by the applicable term amounts specific to your campus.

If a different value is reported in this field by the campus, it cannot exceed the annual Tuition/Fee amount. When reporting changes to the term Tuition/Fee amounts, you must also indicate a "C" in field 42 to indicate the transaction is a correction. In addition to field 42, an adjustment reason code of 4 (Fees) must be indicated in field 22/29/36 (for the Fall/Winter/Spring term). Adjustment reason code of 3 (Eligibility) may also be used but the Fees code of 4 is preferred when making updates to the student's Tuition/Fee at the term level.

CSAC will use the new values reported to recalculate the student's MCS award.

Field #24/31/38 – Fall/Winter/Spring Federal Aid Amount: Used to adjust a student's term specific Federal Aid amount.

CSAC will provide a value in this field (the annual Federal Aid amount divided by the number of terms).

If a different value is reported in this field by the campus, it cannot exceed the annual Federal Aid amount. When reporting changes to the term Federal Aid amounts, you must also indicate a "C" in field 42 to indicate the transaction is a correction. In addition to field 42, an adjustment reason code of 3 (Eligibility) must also be reported in field 22/29/36 (for the Fall/Winter/Spring term).

CSAC will use the new values reported to recalculate the student's MCS award.

Field #25/32/39 – Fall/Winter/Spring Institutional Aid Amount: Used to adjust a student's term specific Institutional Aid amount.

CSAC will provide a value in this field (the annual Institutional Aid Amount divided by the number of terms).

If a different value is reported in this field by the campus, it cannot exceed the annual Institutional Aid amount. When reporting changes to the term Institutional Aid amounts, you must also indicate a "C" in field 42 to indicate the transaction is a correction. In addition to field 42, an adjustment reason code of 3 (Eligibility) must also be reported in field 22/29/36 (for the Fall/Winter/Spring term).

CSAC will use the new values reported to recalculate the student's MCS award.

Field #26/33/40 – Fall/Winter/Spring State Aid Amount: Used to adjust a student's term specific State Aid amount (excluding Cal Grant).

CSAC will provide a value in this field (the annual State Aid amount divided by the number of terms).

If a different value is reported in this field by the campus, it cannot exceed the annual State Aid amount. When reporting changes to the term State Aid amounts, you must also indicate a "C" in field 42 to indicate the transaction is a correction. In addition to field 42, an adjustment reason code of 3 (Eligibility) must also be reported in field 22/29/36 (for the Fall/Winter/Spring term).

CSAC will use the new values reported to recalculate the student's MCS awards.

NOTE: As a reminder, when reporting State Aid, at the annual or term level, Cal Grant awards should be **EXCLUDED** from any value reported by the campus. CSAC will identify if a student has a Cal Grant and factor that in to their award calculation.

Term Level Corrections – When Payments are Reconciled:

If the **data value submitted is 3 or 4 (Eligibility or Fees)** and a payment exists for the student, the term award will be recalculated and the school will be required to recertify the payment amount.

When applying the recertify amount for a "Recertify Payment," the payment cannot be greater than the recalculated Term Award Amount. The amount must be less than or equal to the Term Award Amount.

NOTE: This includes records where the Eligibility/Fee change recalculation process results in an MCS Term Award amount = $0.00. In the instances where this particular term is the only term that the student is attending, the student's annual MCS award will also be set to $0.00, and the school will be required to recertify the $0.00 payment amount. After the recertification takes place, the student will be removed from the school's roster.

3.3.2 RECERTIFY PAYMENTS:

Students who have payments in a "Recertify Payment" status can be searched through the *Online Payment Roster Screen* or found in the *MCS Roster File Report*.

Online Payment Roster Screen:

1. Enter the school code along with selecting the academic year, check the "Recertify Only" box and click on the Search button.
2. The system will display a list of students who have payments in a "Recertify Payment" status.
3. If the campus does not have any existing payments in this status, the system will generate a message stating "No data found".

School ID	00114900	Acad Year	2015 - 2016	Search ID	SSN	
First Name		Last Name		☑ Recertify Only		Search

SSN	CSAC ID	Last Name	First Name	DOB

4. A payment in this status is identified at the term level by having a [Recertify Payment] status display under the "Adj. Reason Code" field in red font.

MCS Roster File Report:

The *MCS Roster File Report* will display an adjustment reason code of "6" in Fields 22/29/36 (Fall/Winter/Spring Adjustment Reason Code) to show the payment is in a "Recertify Payment" status.

Example: Fall Term in Recertify Status (Field 22 = 6):

3.4 MCS CORRECTION USING THE ONLINE PAYMENT ROSTER:

All correction transactions can be handled through either the batch upload process, or individually utilizing the MCS Online Payment Roster screen.

Below is a sample of making an Annual Level change (Total Income) and a Term Level change (decreased Tuition/Fee). For more descriptions of potential correction and/or payment scenarios, please reference Attachment 1 for the corresponding steps needed to complete the transaction.

3.4.1 ASSUMPTIONS:

To complete the MCS Correction process, the following assumptions have been made:

- The reporting individual has a valid WebGrants user account
- The reporting individual has access to the MCS menu
- The reporting individual has valid MCS Data to report

For detailed log-in instructions, please reference back to sections 2.3 and 2.4.

3.4.2 CORRECTION PROCESS EXAMPLES:

Example 1: Adjusting a student's Total Income via the MCS Online Payment Roster Screen (ANNUAL LEVEL CHANGE)

1. From the MCS School Roster section, select the student you would like to report a correction for.

2. From the Online Payment Roster screen, select the following criteria:
   a. Select the "Correction" radio button
   b. Select "Eligibility" from the "Eligibility Change" drop down box in the "Annual Data" section
   c. Enter the student's new Total Income in the "Total Income" field
   d. If applicable, report the ISIR transaction number associated with the correction
   e. Click the "Save" button

Demographic Information

CSAC ID:

SSN No: XXX - XX - 5974

DOB:

Cal Grant Award: $0

Annual Award: $2,448

Annual Tuition/Fees: $12,240

Asset Amount: $0

TCP Indicator:

Annual Data

Open Terms: Fall, Winter, Spring

Total Income: $39,544 [$ 101,500]

Federal Aid: $0

Institutional Aid: $0

State Aid: $0

ISIR Tran #: 02

Eligibility Change: Eligibility **Payment History**

Transaction Type: Correction ⊙ Payment ○

FALL TERM	WINTER TERM	SPRING TERM
Enrollment Status: --- SELECT ---	Enrollment Status --- SELECT ---	Enrollment Status --- SELECT ---
Term Award Amount [$816] $816	Term Award Amount [$816] $816	Term Award Amount [$816] $816
Adj. Reason Code --- SELECT ---	Adj. Reason Code --- SELECT ---	Adj. Reason Code --- SELECT ---
Amount Paid/Verified	Amount Paid/Verified	Amount Paid/Verified
Tuition/Fees [$4,080]	Tuition/Fees [$4,080]	Tuition/Fees [$4,080]
Federal Aid [$0]	Federal Aid [$0]	Federal Aid [$0]
Institutional Aid [$0]	Institutional Aid [$0]	Institutional Aid [$0]
State Aid [$0]	State Aid [$0]	State Aid [$0]
Payment Status: Not Reconciled	Payment Status: Not Reconciled	Payment Status: Not Reconciled

Save   Back   Reset

3. A pop up box will confirm that your transaction has been saved.
   a. Once a transaction has been saved, the newly reported data will be reflected the following Monday after CSAC completes the weekly processing of files.

4. If after saving the transaction, you would like to delete the submission, you can do so by pulling up the student record again and selecting the "Correction" radio button, then selecting the "Delete" button.

Note: You can delete the transaction prior to processing. The transaction cannot be deleted after it has been processed.

5. Once a correction has been processed, you can view it under the MCS Student Payment History Screen. *OR*,

6. From the MCS Online Payment Roster screen, click on the "Payment History" link found in the Annual Data section.

7. The MCS Student Payment History screen will provide information on any payments and/or corrections that have been processed for that student at both the annual and term level.

Example 2: Decreasing a Student's Tuition/Fees to a Term (TERM LEVEL CHANGE)

1. From the MCS School Roster section, select the student you would like to report a correction for.

2. From the Online Payment Roster screen, select the following criteria:

   a. Select the "Correction" radio button
   b. Select "Fees" from the Adj. Reason Code drop down field under the FALL TERM section
   c. Enter the reduced tuition amount in the Tuition/Fees field
   d. Click the "Save" button

3. A pop up box will confirm that your transaction has been saved.

    a. Once a transaction has been saved, the newly reported data will be reflected the following Monday after CSAC completes the weekly processing of files.

4. If after saving the transaction, you would like to delete the submission, you can do so by pulling up the student record again and selecting the "Correction" radio button, then selecting the "Delete" button.

Note: You can delete the transaction prior to processing. The transaction cannot be deleted after it has been processed.

5. Once a correction has been processed, you can view it under the MCS Student Payment History Screen. **OR**,

6. From the MCS Online Payment Roster screen, click on the "Payment History" link found in the Annual Data section.

7. The MCS Student Payment History screen will provide information on any payments and/or corrections that have been processed for that student at both the annual and term level.

MCS REPORT DOWNLOAD GUIDELINES

4.1 INTRODUCTION:

After the first week of the initial reporting period of the *MCS Payment-Correction File,* the *MCS Roster File Report* and the *MCS Accept/Reject Report* will be available to view and download for each successfully uploaded file. The report provides a summary of the data processed in the *MCS Payment-Correction file*. Each file is processed on a weekly basis and once it's completed, the *MCS Accept/Reject Report* will be made available.

4.1.1 ASSUMPTIONS:

To complete the process of downloading the *MCS Roster File Report* and the *MCS Accept/Reject Report*, the following assumptions have been made:

- The individual retrieving the report has a valid WebGrants user account.
- The individual retrieving the report has access to the MCS Menu.
- A valid *MCS Payment-Correction File* has been uploaded for the institution.
- The valid *MCS Payment-Correction File* was uploaded a week prior to attempting to retrieve the report.

4.2 DOWNLOADING THE MCS ROSTER FILE REPORT:

1. Navigate to the WebGrants System login page.
   - This is the entry point through which all authorized user can access the WebGrants application.

2. Enter the *User Name* and *Password* and select the *Sign-in* button.

3. The system will display the *CSAC Portal Menu* screen upon successfully authenticating the login credentials.
   - **Note:** Depending on the profile authorization, there may be more options available in the CSAC Portal Menu.

4. Select the *Middle Class Scholarship* menu option.

California Student Aid Commission
WebGrants System

Tools Help Sign Out

Welcome! School 1
To the **CSAC Portal** Menu

The last time you logged on to this system was: 06/03/2014 08:35:26 am
Number of failed attempts since your last login: 0

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

Portal Menu	Account Information
WebGrants	View Your Account Details
Middle Class Scholarship	Help With Your Account

WebGrants System – CSAC Portal Menu

5. The system will display the *Middle Class Scholarship Menu* screen.

6. Select the *MCS – Data Transfer* menu selection.

7. The system will display the *MCS – Data Transfer Menu* screen.

8. Select the *Report Download* menu selection.

MCS - Data Transfer Menu

9. The system will display the *MCS Report Download* screen.

10. Enter the *School ID* and select the *File Type* from the drop down menu.

Note: The *Academic Year* field is defaulted to the current year, the *Month* field is defaulted to the current month and the *Media Type* is defaulted to *Data File*.

11. Select the *Retrieve* button.
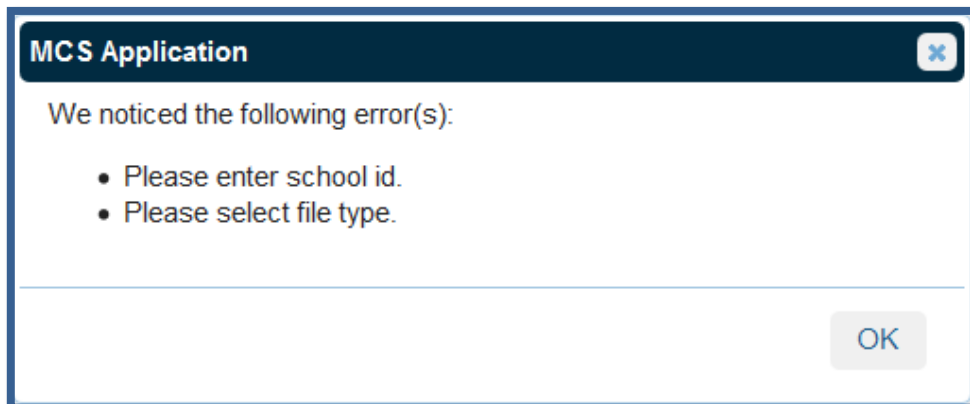
MCS – Data Transfer Menu – Report Download Screen

12. If the *School ID* and *File Type* are not selected the system will display an exception message.

13. Select the *OK* button.

14. The system will display the *MCS Report Download* screen.

MCS – Report Download –Exception Message

15. If there is no data to report, the system will display an exception message.

16. Select the *OK* button.

17. The system will default back to the *MCS Report Download* screen.
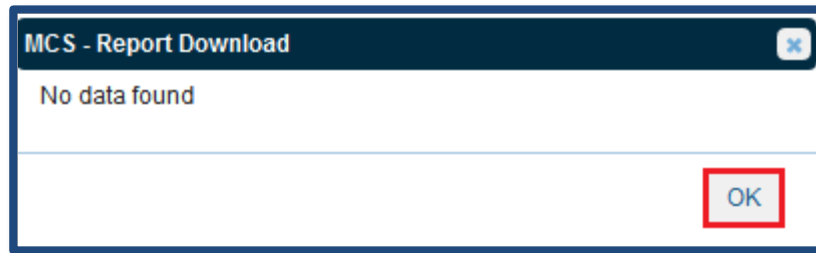
MCS – Report Download – No Data Found Exception Message

18. If there is data to report and the *Report Download* field entries are valid, the system will

    display the *MCS Roster File Report* in an embedded panel.

Note: If multiple files were submitted, there will be multiple reports contained within the embedded panel which will be sorted by *Report Date.*

MCS – Report Download – MCS Roster File Report

19. To review the content in the report, select the *Download* button.

20. The system will display the *MCS Roster File Report* dialogue box.

21. Select the *OK* button.

22. The system will open up and display the *MCS Roster File Report* which provides the summary details of the records submitted in the *MCS Payment File*.

   Note: The *MCS Roster File Report* is only available in the Data File format.

4.3 MCS REPORTS AVAILABLE TO DOWNLOAD:

Besides the *MCS Roster File Report*, the *Report Download* section also has various other reports that are available to download on a weekly basis. The only exception is the *MCS Admission Process Summary Report* which is only generated during the initial submission of the Admission Files.

4.3.1 CAMPUS REPORTS:

To complete the process of downloading the MCS reports, the user must use the *MCS – Data Transfer* menu.

The *Admission File Report* is only available in the Data File format (Media type) and provides a summary of the total number of records in the file. It also includes a count of the number of records accepted and rejected. This report is only available during the initial submission of the Admission Files.

School ID	00115000		Acad Year	2015 - 2016		File Type	Admission File Rep
Month	All		Media	Data File		Retrieve	

Report Date	Description	File Type	Month	
2/3/2015	Admission File Data File	Data File	FEB	Download

The *Enrollment File Report* is available in both the Data File and Report formats. The report provides a list of students who are ineligible for an MCS award or were rejected from the Enrollment File. The report will only display the most recent transactions that have been processed by the Commission.

a) *Data File* format will display an error code that begins with an alpha value followed by a three digit code (I007, R020) along with the student's information.

Data File Format Example:

```
MCSED          00113900     CSU LONG BEACH
R011 R024 R025 R026          xxxxxxxxxx TEST          TRAN                19960302
```

b) *Report* format will display the data submitted along with the ineligible or rejected code and a description of the codes.

Report Format Example:

```
MCS_ENRL                            CALIFORNIA STUDENT AID COMMISSION                    PAGE:         1
BATCH DATE: 06/10/2015       MCS ENROLLMENT PROCESS ELIGIBILITY SUMMARY REPORT      RUN DATE: 06/19/2015
                                        ACADEMIC YEAR 2015                          RUN TIME:   11:09:14



File was uploaded on 06/19/2015 by user TEST1_DR

00113912015xxxxxxxxxxTRAN          TEST          19960302201XTTRAN.XXXX@CSAC.CA.GOV                    51000000000000000000000000000000000
R011 Rejected - Invalid TCP Flag: X
R024 Rejected - Dependency Status does not match the ISIR value
R025 Rejected - Total Income does not match the ISIR value
R026 Rejected - Student's EFC is Blank
```

The *Award Rejects Report* is available in the Report format. The report provides a list of students who are rejected during the award process due to mismatch data between the enrollment information submitted and CSAC's system. The rejected students will continue to appear in the report until their record has been corrected.

School ID	00115300	Acad Year	2015 - 2016	File Type	Award Rejects Rep
Month	September	Media	Report	Retrieve	

Report Date	Description	File Type	Month	
9/4/2015	Award Rejects Report	Report File	SEP	Download
9/11/2015	Award Rejects Report	Report File	SEP	Download

The *Accept/Reject Report* is available in the Data File format. The report provides a list of students who had payments or corrections applied during the week. The report is broken down into three sections: Accepted, Rejected and Exception. The report will display the most recent transactions that have been processed by the Commission.

School ID	03260300	Acad Year	2015 - 2016	File Type	Accept/Reject Rep
Month	All	Media	Data File	Retrieve	

Report Date	Description	File Type	Month	
7/24/2015	Accept/Reject Data File	Data File	JUL	Download
8/18/2015	Accept/Reject Data File	Data File	AUG	Download
8/18/2015	Accept/Reject Data File	Data File	AUG	Download

The *Payment Activity Report* is available in the Report format. The report provides a summary of payments made to the institutions, reconciled payment transactions, amount of funds disbursed, payment transactions, balances and a summary of the Year-to-Date activity. The report is a cumulative report and displays the weekly activity from the first time a payment was applied through the most current data.

School ID	03260300	Acad Year	2014 - 2015	File Type	Payment Activity F
Month	All	Media	Report	Retrieve	

Report Date	Description	File Type	Month	
2/6/2015	Payment Activity Report	Report File	FEB	Download
2/13/2015	Payment Activity Report	Report File	FEB	Download
2/20/2015	Payment Activity Report	Report File	FEB	Download
2/27/2015	Payment Activity Report	Report File	FEB	Download
3/6/2015	Payment Activity Report	Report File	MAR	Download
3/13/2015	Payment Activity Report	Report File	MAR	Download
3/20/2015	Payment Activity Report	Report File	MAR	Download
3/27/2015	Payment Activity Report	Report File	MAR	Download
4/3/2015	Payment Activity Report	Report File	APR	Download
4/10/2015	Payment Activity Report	Report File	APR	Download

1 2 3

The *MCS CG Sync Report* is available in the Report format. The report provides a list of students who went through the MCS/Cal Grant data match process. It displays a summary of the students Cal Grant and MCS awards before and after the process ran. The report will display the most recent transactions that have been processed by the Commission.

Report Date	Description	File Type	Month	
7/24/2015	MCS CG Sync Report	Report File	JUL	Download

The *Student Reconciliation Report* is available in the Report format. The report provides a summary of students with reconciled payments to date (only payments greater than $0 appear).

Report Date	Description	File Type	Month	
9/4/2015	Student Reconciliation Report	Report File	SEP	Download
9/11/2015	Student Reconciliation Report	Report File	SEP	Download

REFERENCE INFORMATION

For more information visit the *Middle Class Scholarship Information* webpage on the California Student Aid Commission website.

http://www.csac.ca.gov/doc.asp?id=1481

	ATTACHMENT 1 CORRECTIONS AND PAYMENTS		
Scenario	**Correction Type**	**MCS Online Payment Roster Screen**	**Batch – Payment/Correction File Upload**
1. Posting Full-Time Payment to the Fall term	Term	- Select Payment radio button - Select "HT or more-Pay" from the Enrollment Status drop down field - The Amount Paid/Verified field is automatically populated with the Fall term award amount - Hit the Save button Results: The update to the record will be available the following Monday. The payment will show as applied and the Payment Status for the Fall term will show as Reconciled.	- Field 15 (Student's Fall Enrollment Status) – Enter 1 for HT or more-Pay - Field 21 (Fall MCS Award Payment) – Enter the Fall term award amount - Field 42 (Transaction Type) – Enter P for "Payment Information" Results: The update to the record will be available the following Monday. The payment will show as applied and the Payment Status for the Fall term will change to Reconciled.
2. Posting Payment Less Than HT to the Winter term	Term	- Select Payment radio button - Select "Less Than HT – (Do Not Pay)" from the Enrollment Status drop down field - The Amount Paid/Verified field is automatically populated with a $0 payment amount - Hit the Save button	- Field 16 (Student's Winter Enrollment Status) – Enter 2 for Less Than HT – (Do Not Pay) - Field 28 (Winter MCS Award Payment) – Enter a $0 dollar amount - Field 42 (Transaction Type) – Enter P for "Payment Information"

		Results: The update to the record will be available the following Monday. The payment will show as applied with a $0 amount and the Payment Status for the Winter term will show as Reconciled.	Results: The update to the record will be available the following Monday. The payment will show as applied with a $0 amount and the Payment Status for the Winter term will show as Reconciled.
3. Posting Payment of Not Enrolled to the Spring term	Term	• Select Payment radio button • Select "Not Enrolled" from the Enrollment Status drop down field • The Amount Paid/Verified field is automatically populated with a $0 payment amount • Hit the Save button Results: The update to the record will be available the following Monday. The payment will show as applied with a $0 amount and the Payment Status for the Spring term will show as Reconciled.	• Field 17 (Student's Spring Enrollment Status) – Enter 3 for Not Enrolled • Field 35 (Spring MCS Award Payment) – Enter a $0 dollar amount • Field 42 (Transaction Type) – Enter P for "Payment Information" Results: The update to the record will be available the following Monday. The payment will show as applied with a $0 amount and the Payment Status for the Spring term will show as Reconciled.
4. Student's annual Pell grant has increased or decreased -Student does not have any existing payments	Annual	• Select Correction radio button • Select "Eligibility " on Eligibility Change drop down field • Enter new annual Pell grant in the Federal Aid field and hit save • Hit the Save button	• Field 12 (Student's Federal Aid) – Enter new annual Pell Grant amount • Field 41 (Eligibility Change) – Enter 3 for Eligibility • Field 42 (Transaction Type) – Enter C for "Correction" Results:

		Results:	The student's MCS award will be recalculated using the new Pell amount. The update to the MCS award information will be available the following Monday. The student's new award may be higher, lower or zero based on the new Pell amount provided.
		The student's MCS award will be recalculated using the new Pell amount. The update to the MCS award information will be available the following Monday. The student's new award may be higher, lower or zero based on the new Pell amount provided.	
5. Student's annual Total Income has increased -Student does not have any existing payments	Annual	• Select Correction radio button • Select "Eligibility " on Eligibility Change drop down field • Enter new annual total income in the total Income field and hit save • Hit the Save button Results: The student's MCS award will be recalculated using the new income amount. The update to the MCS award information will be available the following Monday. The student's new award may be higher, lower or zero based on the new income amount provided. ***NOTE:*** *Multiple annual level changes can be made in the same week. For example, the Pell grant decrease/increase from scenario #4 and the total income increase from this scenario (#5) can be submitted together for the same record using the correction transaction since both changes are considered annual level changes.*	• Field 11 (Total Income) – Enter new total income • Field 41 (Eligibility Change) – Enter 3 for Eligibility • Field 42 (Transaction Type) – Enter C for "Correction" Results: The student's MCS award will be recalculated using the new income amount. The update to the MCS award information will be available the following Monday. The student's new award may be higher, lower or zero based on the new income amount provided.

| 6. Student is not eligible for MCS due to SAP, Post Bacc, Not Enrolled, Other or Over Asset Ceiling. The campus wants to remove the student from their MCS roster.

-Student can have existing reconciled payments or no payments | Annual | • Select Correction radio button

• Select a reason from the Eligibility Change drop down field (SAP, Post Bacc, Not Enrolled, Other or Over Asset Ceiling)

• Hit the Save button

Results:
Student will be withdrawn from the MCS program and removed from the campus roster the following Monday.
If the student has existing reconciled payments, the payments will remain on the record and will not change to a "Recertify Payment" status. | • Field 41 (Eligibility Change) – Enter 1, 2, 4, 5 or 7 for Post Bacc, SAP, Not Enrolled, Other or Over Asset Ceiling

• Field 42 (Transaction Type) – Enter C for "Correction"

• If a payment exists for either the FL, WN, SP terms; make sure to remove the information from the payment file:
   o Students' Enrollment Status (Fields 15, 16, 17)
   o MCS Award Payment (Fields 21, 28, 35)

NOTE: *If the existing payment information is not removed from the payment file for either term, the system will assume you are attempting to make both a payment and a correction for the same student record.*

Results:
Student will be withdrawn from the MCS program and removed from the campus roster the following Monday. If the student has existing reconciled payments, the payments will remain on the record and will not change to a "Recertify Payment" status. |

7. School Change Process: There is no mechanism in place to do a school change however a process does exist that can simulate a similar change. This requires both campuses to assist in completing the process. **Campus A** – Fall term has a reconciled payment **Campus B** – Student will be attending the Spring term	Enrollment File & Annual	**Campus A**: Must withdraw student from their roster by using the Not Enrolled or Other options. • Select Correction radio button • Select a reason from the Eligibility Change drop down field (Not Enrolled or Other) • Hit the Save button Results: Student will be withdrawn from the MCS program and removed from the MCS roster the following Monday. If the student has existing reconciled payments, the payments will remain on the record and will not change to a "Recertify Payment" status. **Campus B:** Must submit an Enrollment file with the Student Status field designated as a Spring Transfer (Field 9 = 4). The file can be submitted prior to Campus A withdrawing the student or afterwards. ▪ *If the student is a WN transfer, submit a 3 for the Student's Status* If the Enrollment file is submitted prior to being withdrawn, the student will appear on the MCS Enrollment Process Eligibility Report as a pended record. Results: After being withdrawn, the student will be picked up and processed under Campus B (if eligible). The student will appear on Campus B roster the following Monday.	**Campus A:** Withdraw Student • Field 41 (Eligibility Change) – Enter 4 or 5 (Not Enrolled or Other) to remove student from your roster • Field 42 (Transaction Type) – Enter C for "Correction" **Campus B** – Submit Enrollment file • Field 9 (Student's Status) of the Enrollment File – Submit a 4 for SP Transfer ▪ *If the student is a WN transfer, submit a 3 for the Student's Status* If the Enrollment file is submitted prior to being withdrawn, the student will appear on the MCS Enrollment Process Eligibility Report as a pended record. Results: After being withdrawn, the student will be picked up and processed under Campus B (if eligible). The student will appear on Campus B roster the following Monday.

| 8. Student's tuition for Fall term has decreased due to official part –time status AND Student's tuition for Spring term has increased for being part of the Teacher Credential Program. | Term | Select Correction radio button Fall Term =
Select "Fees" on Adj. Reason Code drop down field and enter value for the new tuition/fees amount
Spring Term =
Select "Teacher Credential Program Flag (TCP)" on Adj. Reason Code drop down field
Hit the Save button
NOTE: *For the Spring term, CSAC will treat the value as the student being enrolled in the TCP program and will re-calculate the term using the stored TCP amount for the segment type.*

Results:
    The student's Fall and Spring term award will be recalculated using the new tuition/fees amount and the TCP value. The update to the MCS award information will be available the following Monday. The student's new term award will be lower for Fall and higher for the Spring term based on the new values provided. | Field 22 (Fall Adjustment Reason Code) – Enter 4 for Fees Field 23 (Fall Tuition/Fee) – Enter new tuition value Field 36 (Spring Adjustment Reason Code) – Enter 8 for Teacher Credential Program Flag (TCP) Field 37 (Spring Tuition/Fee) – Do not enter a tuition value (leave blank) Field 41 (Eligibility Change) – Leave blank Field 42 (Transaction Type) – Enter C for "Correction" **NOTE:** *For the Spring term, CSAC will treat the value as the student being enrolled in the TCP program and will re-calculate the term using the stored TCP amount for the segment type.*

Results:
    The student's Fall and Spring term award will be recalculated using the new tuition/fees amount and the TCP value. The update to the MCS award information will be available the following Monday. The student's new term award will be lower for Fall and higher for the Spring term based on the new values provided. |

| 9. Student has been paid full amount for Fall term, but decides to officially go part time for Winter or Spring. As a result, his Pell grant for Winter or Spring decreases. | Term | • Select Correction radio button

• Select "Eligibility" on Adj. Reason Code drop down field for either the Winter or Spring term and enter value for new tuition/fees amount.

• In addition, enter new Winter or Spring Federal Aid amount since the Pell was reduced

• Hit the Save button

Results:
    The student's Winter and Spring terms will be recalculated with new tuition/fees and Pell amounts provided. The update to the MCS award information will be available the following Monday. The student's new term award may be higher, lower or zero based on the new tuition/fees and Pell amounts provided.

NOTE: *The Winter and Spring term amounts will be different than the Fall term since the Winter or Spring terms were re-evaluated. However, the sum of the Fall, Winter and Spring term amounts will add up to the new annual amount.* | **Winter Term =**
• Field 29 (Winter Adjustment Reason Code) – Enter 3 for Eligibility
• Field 30 (Winter Tuition/Fee Amount) – Enter new tuition value
• Field 31 (Winter Federal Aid Amount) – Enter new Pell value

Spring Term =
• Field 36 (Spring Adjustment Reason Code) - Select 3 for Eligibility
• Field 37 (Spring Tuition/Fee Amount) – Enter new tuition value
• Field 38 (Spring Federal Aid) – Enter new Pell value

• Field 41 (Eligibility Change) – Leave blank

• Field 42 (Transaction Type) – Enter C for "Correction"

• If a payment exists for either term; make sure to remove the information from the payment file:
    o Students' Enrollment Status (Fields 15, 16, 17)
    o MCS Award Payment (Fields 21, 28, 35)

NOTE: *If the payments are not removed from the file for either term, the system will assume you are attempting to make both a payment and a correction for the same student record.*

Results:
    The student's Winter and Spring terms will be recalculated with new tuition/fees and Pell amounts provided. The update to the MCS award information will be available the following Monday. The student's new term award may be higher, lower or zero based on the new tuition/fees and Pell amounts provided. |

| 10. Student's annual Total Income decreases (Week 1) and the Winter or Spring Institutional Aid increases (Week 2).

-Student does not have any existing payments | 1. Annual (Week 1)

2. Term (Week 2) | **WEEK 1:**
• Select Correction radio button

• Select "Eligibility" on Eligibility Change drop down field in the Annual Data section

• Enter the new reduced income in the Total Income field

• Hit the Save button

✤ In order to apply the Winter or Spring term change, the campus must wait for CSAC to process the annual change first (WEEK 1) then continue with the WEEK 2 transaction (term level).

Results:
   The annual award is re-calculated and changes the term award amounts.

WEEK 2:
• Select "Correction" radio button

• Select "Eligibility" on the Adj. Reason Code drop down field menu for the Winter or Spring term.

• Enter the new value amount in the Institutional Aid field.

• Hit the Save button

Results:
   The Winter or Spring term award is re-calculated and changes the term award amount. | **WEEK 1:**
• Field 11 (Total Income) – Enter reduced income

• Field 41 (Eligibility Change) - Enter 3 for Eligibility

• Field 42 (Transaction Type) – Enter C for "Correction"

✤ In order to apply the Winter or Spring term change, the campus must wait for CSAC to process the annual change first (WEEK 1) then continue with the WEEK 2 transaction (term level).

Results:
   The annual award is re-calculated and changes the term award amounts.

WEEK 2:
• Field 29 (Winter Adjustment Reason Code) – Enter 3 for Eligibility

• Field 32 (Winter Institutional Aid) – Enter new institutional aid value

   OR

• Field 36 (Spring Adjustment Reason Code) - Enter 3 for Eligibility

• Field 39 (Spring Institutional Aid) – Enter new institutional aid value

• Field 42 (Transaction Type) – Enter C for "Correction"

Results:
   The Winter or Spring term award is re-calculated and changes the term award amount. |

11. Student's annual Pell grant has increased
 	
-Student has an existing reconciled payment for the Fall term
	1. Annual
	
	2. Term (Recertify Payment)
		WEEK 1:
		
		• Select "Correction" radio button
		
		• Select "Eligibility " on Eligibility Change drop down field in the Annual Data section
		
		• Enter new annual Pell grant in the Federal Aid field
		
		• Hit the Save button
		
		Results:
		    The student's annual award will be recalculated using the new Federal Aid amount. The update to the MCS award information will be available the following Monday.
		    • The student's new term award will be lower or zero based on the new federal aid amount provided.
		    • The existing Fall term payment will change to a "Recertify Payment" status due to the new term award amount.
		
		WEEK 2:
		
		The campus must recertify the new Fall Term payment based on the new term award amount.
		
		⚜ **RECERTIFYING A PAYMENT THROUGH THE ROSTER SCREEN. There are two options available:**
			WEEK 1:
			
			• Field 12 (Student's Federal Aid) – Enter new annual Pell Grant amount
			
			• Field 41 (Eligibility Change) – Enter 3 for Eligibility
			
			• Field 42 (Transaction Type) – Enter C for "Correction"
			
			Results:
			    The student's annual award will be recalculated using the new Federal Aid amount. The update to the MCS award information will be available the following Monday.
			    • The student's new term award will be lower or zero based on the new federal aid amount provided.
			    • The existing Fall term payment will change to a "Recertify Payment" status due to the new term award amount.
			    • New payment roster file will display the number 6 in Field 22 (Recertify Payment value)
			
			WEEK 2:
			
			The campus must recertify the new Fall Term payment based on the new term award amount.
			
			⚜ **RECERTIFYING A PAYMENT THROUGH THE PAYMENT-CORRECTION FILE**
			
			• Field 15 (Student's Fall Enrollment Status) – Enter 1 for HT or more (Pay)
			
			• Field 21 (Fall MCS Award Payment) – Enter the new payment amount (this should equal the value in Field 20, Fall MCS Award Amount).
			
			• Field 22 (Fall Adjustment Reason Code) – Remove the number 6 from the field (leave blank)

		Option 1:	• Field 42 (Transaction Type) – Enter P for "Payment Information"
		• Select Payment radio button	
			NOTE: *The payment amount cannot be greater than the new term award amount.*
		• In the Fall term section, select HT or More (Pay) from the Enrollment Status field	
			Results:
		• The Amount Paid/Verified field will automatically populate with the new payment amount (new term award amount)	The update to the MCS award information will be available the following Monday. The student's Fall term will display the new payment amount.
		• Hit the Save button	
		Option 2:	
		• Select Payment radio button	
		• In the Fall term section, select Refund/Adjusted Payment from the Adj. Reason Code drop down menu	
		• Enter the adjusted amount in the Amount Paid/Verified field	
		• Hit the Save button	
		NOTE: *The payment amount cannot be greater than the new term award amount.*	
		Results:	
		The update to the MCS award information will be available the following Monday. The student's Fall term will display the new payment amount.	

| 12. Student's tuition for Spring term has increased for being part of the Teacher Credential Program.

-Student does not have an existing payment for the Spring term | Term | • Select "Correction" radio button

• In the Spring term section, select "Teacher Credential Program Flag (TCP)" from the Adj. Reason Code drop down menu

• The other aid fields are disabled since an amount is not required to be entered when selecting the TCP adjustment code

• Hit the Save button

NOTE: _CSAC will treat this value as the student being enrolled in the TCP program for the Spring term and will re-calculate the term using the stored TCP amount for the segment type._

Results:
    The student's Spring term will be re-calculated using the higher tuition/fees amount. The update to the MCS award information will be available the following Monday. The student's new Spring term award will be higher. The Fall or Winter terms will not be affected by the change. | • Field 36 (Spring Adjustment Reason Code) – Enter 8 for Teacher Credential Program Flag (TCP)

• Field 37 (Spring Tuition/Fee Amount) – Do not enter a tuition value (leave blank)

• Field 42 (Transaction Type) – Enter C for "Correction"

NOTE: _CSAC will treat this value as the student being enrolled in the TCP program for the Spring term and will re-calculate the term using the stored TCP amount for the segment type._

Results:
    The student's Spring term will be re-calculated using the higher tuition/fees amount. The update to the MCS award information will be available the following Monday. The student's new Spring term award will be higher. The Fall or Winter terms will not be affected by the change. |

13. To Remove the TCP value to the term level *(Related to Scenario 12)* - Student does not have an existing payment for the Spring term	Term	• Select "Correction" radio button • In the Spring term section, select "Fees" from the Adj. Reason Code drop down menu • Enter the campus standard tuition amount for the term in the Tuition/Fees field • Hit the Save button **NOTE:** *If the Tuition/Fee is not updated with the campus standard amount, the higher Tuition/Fees amount will remain on the record.* Results: The student's Spring term will be re-calculated using the lower tuition/fees amount. The update to the MCS award information will be available the following Monday. The student's new Spring term award will be lower. The Fall or Winter terms will not be affected by the change.	• Field 36 (Spring Adjustment Reason Code) – Enter 4 for Fees • Field 37 (Spring Tuition/Fee Amount) – Enter the campus standard tuition amount for the term • Field 42 (Transaction Type) – Enter C for "Correction" **NOTE:** *If the Tuition/Fee is not updated with the campus standard amount, the higher Tuition/Fees amount will remain on the record.* Results: The student's Spring term will be re-calculated using the lower tuition/fees amount. The update to the MCS award information will be available the following Monday. The student's new Spring term award will be lower. The Fall or Winter terms will not be affected by the change.
14. Student is found ineligible due to their Total Income being over $150,000 -Student has an existing reconciled payment for the Fall term	1. Annual	**WEEK 1:** • Select Correction radio button • Select "Eligibility" on Eligibility Change drop down field in the Annual Data section • Enter the new income amount in the Total Income field • Hit the Save button	**WEEK 1:** • Field 11 (Total Income) – Enter new income amount • Field 41 (Eligibility Change) - Enter 3 for Eligibility • Field 42 (Transaction Type) – Enter C for "Correction" Results: The student will be found financially ineligible for the MCS program (not awarded). The update to the MCS

2. Term (Recertify Payment)	Results: - Student will be found financially ineligible for the MCS program (not awarded). The update to the MCS award information will be available the following Monday. - The student's new term award will be zero based on the new total income amount provided. - The existing Fall term payment will change to a "Recertify Payment" status due to the new term award amount. The student will remain on the roster until the payment is verified. **WEEK 2:** The campus must recertify the new Fall Term payment based on the new term award amount. ➕ **RECERTIFYING A PAYMENT THROUGH THE ROSTER SCREEN. There are two options available:** **Option 1:** - Select Payment radio button - In the Fall term section, select HT or More (Pay) from the Enrollment Status field - The Amount Paid/Verified field will automatically populate with the new payment amount of $0 (new term award amount) - Hit the Save button	award information will be available the following Monday. - The student's new term award will be zero based on the new total income amount provided. - The existing Fall term payment will change to a "Recertify Payment" status due to the new term award amount. The student will remain on the roster until the payment is verified. - New payment roster file will display the number 6 in Field 22 (Recertify Payment value) **WEEK 2:** The campus must recertify the new Fall Term payment based on the new term award amount. ➕ **RECERTIFYING A PAYMENT THROUGH THE PAYMENT-CORRECTION FILE** - Field 15 (Student's Fall Enrollment Status) – Enter 1 for HT or more (Pay) - Field 21 (Fall MCS Award Payment) – Enter the new payment amount of $0 (this should equal the value in Field 20, Fall MCS Award Amount). - Field 22 (Fall Adjustment Reason Code) – Remove the number 6 from the field (leave blank) - Field 42 (Transaction Type) – Enter P for "Payment Information" ***NOTE:*** *The payment amount cannot be greater than the new term award amount.* Results: The update to the MCS award information will be available the following Monday. The student's Fall term will display the new payment amount. The student will be removed from the campus roster.

		Option 2: • Select Payment radio button • In the Fall term section, select Refund/Adjusted Payment from the Adj. Reason Code drop down menu • Enter the adjusted amount of $0 in the Amount Paid/Verified field • Hit the Save button ***NOTE:*** *The payment amount cannot be greater than the new term award amount.* Results: The update to the MCS award information will be available the following Monday. The student's Fall term will display the new payment amount. The student will be removed from the campus roster.	
15. Adding the Teacher Credential Program (TCP) Flag at the Annual level	Annual	• Select Correction radio button • Select "Add TCP" on Eligibility Change drop down field in the Annual Data section • Hit the Save button ***NOTE:*** *CSAC will recalculate the student's award amount at the annual level using the stored TCP amount for the segment type.*	• Field 41 (Eligibility Change) – Enter 8 for Add TCP • Field 42 (Transaction Type) – Enter C for "Correction" ***NOTE:*** *CSAC will recalculate the student's award amount at the annual level using the stored TCP amount for the segment type.*

		Results: The update to the MCS award information will be available the following Monday. For CSU campuses, the student's annual award amount will calculate to a higher total. For UC campuses, the annual award amount should remain the same since the TCP amount is the same as their Tuition/Fees.	Results: The update to the MCS award information will be available the following Monday. For CSU campuses, the student's annual award amount will calculate to a higher total. For UC campuses, the annual award amount should remain the same since the TCP amount is the same as their Tuition/Fees.
16. Removing the Teacher Credential Program (TCP) Flag at the Annual level	Annual	• Select Correction radio button • Select "Remove TCP" on Eligibility Change drop down field in the Annual Data section • Hit the Save button **_NOTE:_** _CSAC will recalculate the student's award amount at the annual level using the standard Tuition/Fees amount for the segment type._ Results: The update to the MCS award information will be available the following Monday. For CSU campuses, the student's annual award amount will calculate to a lower total. For UC campuses, the annual award amount should remain the same since the TCP amount is the same as their Tuition/Fees.	• Field 41 (Eligibility Change) – Enter 9 for Remove TCP • Field 42 (Transaction Type) – Enter C for "Correction" **_NOTE:_** _CSAC will recalculate the student's award amount at the annual level using the standard Tuition/Fees amount for the segment type._ Results: The update to the MCS award information will be available the following Monday. For CSU campuses, the student's annual award amount will calculate to a lower total. For UC campuses, the annual award amount should remain the same since the TCP amount is the same as their Tuition/Fees.