

# California Student Aid Commission

## **WebGrants Nuts and Bolts**

*2018 CASFAA Conference  
Palm Desert, CA*



# Your WebGrants Account

*Making education beyond high school financially accessible to all Californians.*



# If You Are The System Administrator...

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

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

## Portal Menu

[WebGrants](#)

[Table Edit](#)

[User Administration](#)

[CA Dream Act](#)

[SB 70](#)

## Account Information

[View Your Account Details](#)

[Help With Your Account](#)



# Adding a New User

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

UserID/Password	
User ID *	<input type="text"/>
Password *	<input type="password"/>
<small>Six-character minimum; no spaces</small>	
Retype Password *	<input type="password"/>

Contact Information	
First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Title	<input type="text"/>
Address 1 *	<input type="text"/>
Address 2	<input type="text"/>
City *	<input type="text"/>
State *	<input type="text"/>
Zip Code *	<input type="text"/>
Email Address *	<input type="text"/>
ReType Email Address *	<input type="text"/>
Phone Number *	<input type="text"/> <input type="text"/> <input type="text"/> Ext <input type="text"/>
Fax Number	<input type="text"/>
Security Training Received Date	<input type="text"/>
<small>Date Format: mm/dd/yyyy example: 02/18/2002</small>	

User Roles	
User Role *	<input type="text"/>
Screen Templates	<input type="text"/>
Effective Start Date *	03/18/2014
Effective End Date *	<input type="text"/>
<small>Date Format: mm/dd/yyyy example: 02/18/2002</small>	

Add New User



# Adding a New User

- Assign access to specific WebGrants screens depending on what the User will be doing
- For Example: a User from your fiscal office may only need access to 'Report Download', and the Reconciliation screens.

Screen Access				
Screen Name	Access Permissions			
<b>Enrollment</b>				
<b>GPA</b>				
<b>Student Info</b>				
<i>Award Summary</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
<i>Award Detail</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
<i>Student History</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
<i>CA Aid Report</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
<i>Grant Record Changes</i>	<input type="radio"/> None	<input type="radio"/> Read	<input checked="" type="radio"/> Write	<input type="radio"/> Grant
<i>Simulator</i>	<input type="radio"/> None	<input type="radio"/> Read	<input checked="" type="radio"/> Write	<input type="radio"/> Grant
<b>School Info</b>				
<b>Roster/Reconciliation</b>				
<i>Customize Roster</i>	<input type="radio"/> None	<input type="radio"/> Read	<input checked="" type="radio"/> Write	<input type="radio"/> Grant
<i>Display Roster</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
<i>Print Roster</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
<i>Display Accept / Reject Report</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
<b>Data Transfer</b>				
<b>Chafee Grant</b>				
<b>Accounting</b>				
<b>California National Guard</b>				
<i>EAAP Roster</i>	<input type="radio"/> None	<input type="radio"/> Read	<input checked="" type="radio"/> Write	<input type="radio"/> Grant
<i>EAAP Payment</i>	<input type="radio"/> None	<input type="radio"/> Read	<input checked="" type="radio"/> Write	<input type="radio"/> Grant
<b>CA Dream Act</b>				
<b>NON-SSN GPA</b>				
<b>SB 70</b>				

Save Changes to CSAC



# Disabling User Access

- Disable WebGrants access for staff that depart
- Input the date on the "End Date"





# Best Practice

- Renew your access each year
  - Set reminders to review user end dates
  - Information Security Confidentiality Agreement
  - System Administrator Access Request Form
- Contact Technology Help Desk for access assistance
  - 888-294-0148
  - [csachelpdesk@csac.ca.gov](mailto:csachelpdesk@csac.ca.gov)
- Contact Institution Support for assistance
  - 888-294-0153
  - [schoolsupport@csac.ca.gov](mailto:schoolsupport@csac.ca.gov)

# Display Roster

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# Timing of Rosters

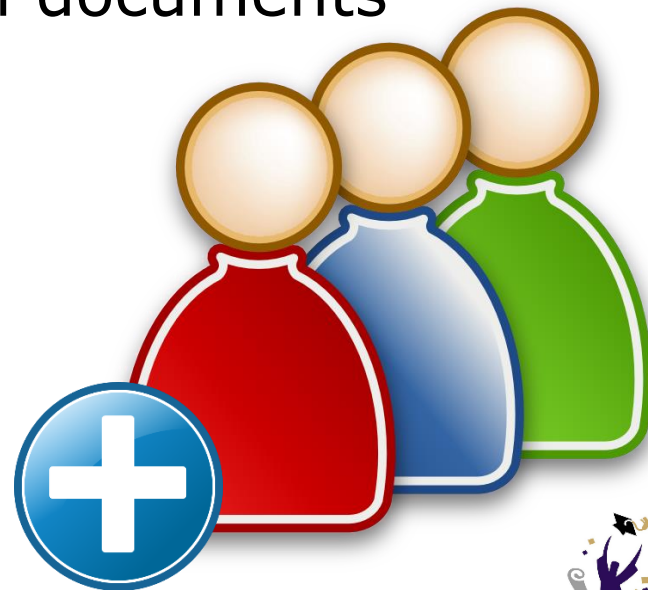
- When do we release rosters?
  - 2018-19 AY – February 2018
  - 2017-18 AY – May 2017
- When do students appear on the roster? (by cycle)
  - High School Entitlement – after students are claimed
  - Transfer Entitlement – immediately after award processing
  - Competitive – immediately after award processing
  - Cal Grant C – after students are scored
  - Renewal – immediately after award processing





# Timing of Rosters

- What are the next steps?
  - Identifying Cal Grant awardees at your campus
  - Certify student eligibility
  - Collect appropriate verification documents
  - Verify any holds or flags
    - Education Level
    - AB 840





# Identifying Cal Grant Awardees

## Implementation of the Claiming Process:

- Utilize the Award Status Extract
  - Provides 2 reports
    - Awarded
    - Not Awarded
- Processing a School Change to 'claim' the student on your roster



# Tools


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# Locating tools in WebGrants

**California Student Aid Commission (SAPRD)**  
**WebGrants System**

[Tools](#) [Help](#) [Sign Out](#)

**Welcome! SA3JXW**  
**To the CSAC Portal Menu**

The last time you logged on to this system was: 03/30/2012 09:31:44 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**  
[WebGrants](#)  
[Table Edit](#)  
[User Administration](#)

**Account Information**  
[View Your Account Details](#)  
[Help With Your Account](#)



# The Tools Page in WebGrants

Tools	
<ul style="list-style-type: none"><li>✦ <b>*Note:</b> Systems that have upgraded to Microsoft Office Excel 2007 will encounter a file format error while exporting HTML in Excel format with an extension (xlsm). For best results download the "Template for Excel 2007" to your computer. *See under "Description" for saving the converted template to your computer</li><li>✦ Each of these tools involves downloading files that use external software. Some require that additional software be resident on the user's computer</li><li>✦ For best results, right click on the link and select the "Save" option.</li><li>✦ A Users Guide containing further descriptions and instructions for each of these tools is located in the Help Center</li></ul>	
Tools	Description
✦ <a href="#">Roster Data File Compare -- Delphi</a>	Provides comparisons between a previous roster data file and the current file
✦ <a href="#">Excel Grant Roster Template -- for Excel '97</a>	Formats roster data files into a Microsoft Excel spreadsheet
✦ <a href="#">Excel Grant Roster Template -- for Excel 2000</a>	Formats roster data files into a Microsoft Excel spreadsheet
✦ <a href="#">Excel Grant Roster Template -- for Excel 2007</a>	<p>*Right-click the link "Excel Grant Roster Template" and select "Save Link As" option to save the template to your computer. Change the name of the file to (.xlsm) and save</p>



# Available Tools in WebGrants

- **Roster Data File Comparison-** Provides comparisons between a previous roster data file and the current file
- **Grant Roster Template-** Formats roster data files into a Microsoft Excel Spreadsheet
- **Reconciliation Template-** Formats reconciliation data files into a Microsoft Excel spreadsheet
- **EL Verification Template-** Formats EL Verification data files into a Microsoft Excel spreadsheet
- **Unclaimed Awards Template-** Formats Unclaimed award data files into a Microsoft Excel spreadsheet



# Roster Data File Compare

Tools	Description
• <a href="#">Roster Data File Compare -- Delphi</a>	Provides comparisons between a previous roster data file and the current file
• <a href="#">Excel Grant Roster Template -- Excel '97</a>	Formats roster data files into a Microsoft Excel spreadsheet
• <a href="#">Excel Grant Roster Template -- Excel 2000</a>	Formats roster data files into a Microsoft Excel spreadsheet
• <a href="#">Excel Grant Roster Template -- Excel 2007</a>	*Right-click the link "Excel Grant Roster Template" and select "Save Link As" option to save the template to your computer. Change the name of the file to (.xslm) and save
• <a href="#">Excel Grant Roster Template -- Excel 2010</a>	*Right-click the link "Excel Grant Roster Template" and select "Save Link As" option to save the template to your computer. Change the name of the file to (.xslm) and save
• <a href="#">Excel Grant Roster Template -- Excel 2013</a>	*Right-click the link "Excel Grant Roster Template" and select "Save Link As" option to save the template to your computer. Change the name of the file to (.xslm) and save
• <a href="#">Excel Reconciliation Template</a>	Formats reconciliation data files into a Microsoft Excel spreadsheet
• <a href="#">Excel Reconciliation Template -- Excel 2007</a>	*Right-click the link "Excel Reconciliation Template" and select "Save Link As" option to save the template to your computer. Change the name of the file to (.xslm) and save
• <a href="#">Excel Reconciliation Template -- Excel 2010</a>	Formats reconciliation data files into a Microsoft Excel spreadsheet
• <a href="#">Excel Reconciliation Template -- Excel 2013</a>	Formats reconciliation data files into a Microsoft Excel spreadsheet
• <a href="#">Excel EL Verification Template</a>	Formats EL Verification data files into a Microsoft Excel spreadsheet
• <a href="#">Excel EL Verification Template -- Excel 2007</a>	*Right-click the link "Excel EL Verification Template" and select "Save Link As" option to save the template to your computer. Change the name of the file to (.xslm) and save







# Grant Roster Data File

Tools	Description
▶ <a href="#">Roster Data File Compare -- Delphi</a>	Provides comparisons between a previous roster data file and the current file
▶ <a href="#">Excel Grant Roster Template -- Excel '97</a>	Formats roster data files into a Microsoft Excel spreadsheet
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▶ <a href="#">Excel Grant Roster Template -- Excel 2010</a>	*Right-click the link "Excel Grant Roster Template" and select "Save Link As" option to save the template to your computer. Change the name of the file to (.xlsm) and save
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▶ <a href="#">Excel Reconciliation Template</a>	Formats reconciliation data files into a Microsoft Excel spreadsheet
▶ <a href="#">Excel Reconciliation Template -- Excel 2007</a>	*Right-click the link "Excel Reconciliation Template" and select "Save Link As" option to save the template to your computer. Change the name of the file to (.xlsm) and save
▶ <a href="#">Excel Reconciliation Template -- Excel 2010</a>	Formats reconciliation data files into a Microsoft Excel spreadsheet
▶ <a href="#">Excel Reconciliation Template -- Excel 2013</a>	Formats reconciliation data files into a Microsoft Excel spreadsheet
▶ <a href="#">Excel EL Verification Template</a>	Formats EL Verification data files into a Microsoft Excel spreadsheet
▶ <a href="#">Excel EL Verification Template -- Excel 2007</a>	*Right-click the link "Excel EL Verification Template" and select "Save Link As" option to save the template to your computer. Change the name of the file to (.xlsm) and save





# Reconciliation Data File

Tools	Description
• <a href="#">Roster Data File Compare -- Delphi</a>	Provides comparisons between a previous roster data file and the current file
• <a href="#">Excel Grant Roster Template -- Excel '97</a>	Formats roster data files into a Microsoft Excel spreadsheet
• <a href="#">Excel Grant Roster Template -- Excel 2000</a>	Formats roster data files into a Microsoft Excel spreadsheet
• <a href="#">Excel Grant Roster Template -- Excel 2007</a>	*Right-click the link "Excel Grant Roster Template" and select "Save Link As" option to save the template to your computer. Change the name of the file to (.xlsm) and save
• <a href="#">Excel Grant Roster Template -- Excel 2010</a>	*Right-click the link "Excel Grant Roster Template" and select "Save Link As" option to save the template to your computer. Change the name of the file to (.xlsm) and save
• <a href="#">Excel Grant Roster Template -- Excel 2013</a>	*Right-click the link "Excel Grant Roster Template" and select "Save Link As" option to save the template to your computer. Change the name of the file to (.xlsm) and save
• <a href="#">Excel Reconciliation Template</a>	Formats reconciliation data files into a Microsoft Excel spreadsheet
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• <a href="#">Excel Reconciliation Template -- Excel 2013</a>	Formats reconciliation data files into a Microsoft Excel spreadsheet
• <a href="#">Excel EL Verification Template</a>	Formats EL Verification data files into a Microsoft Excel spreadsheet
• <a href="#">Excel EL Verification Template -- Excel 2007</a>	*Right-click the link "Excel EL Verification Template" and select "Save Link As" option to save the template to your computer. Change the name of the file to (.xlsm) and save

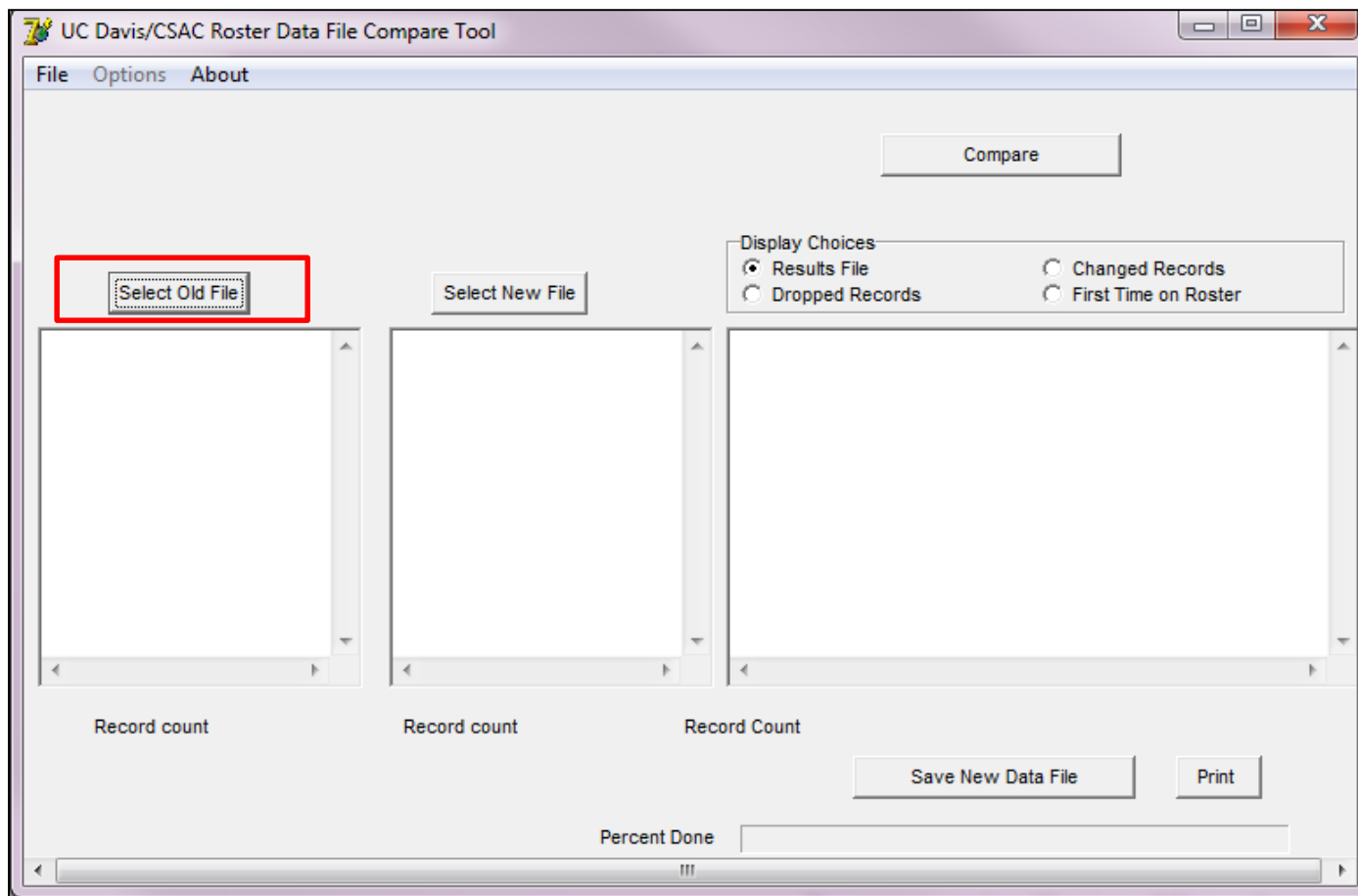




# Roster Data File Compare



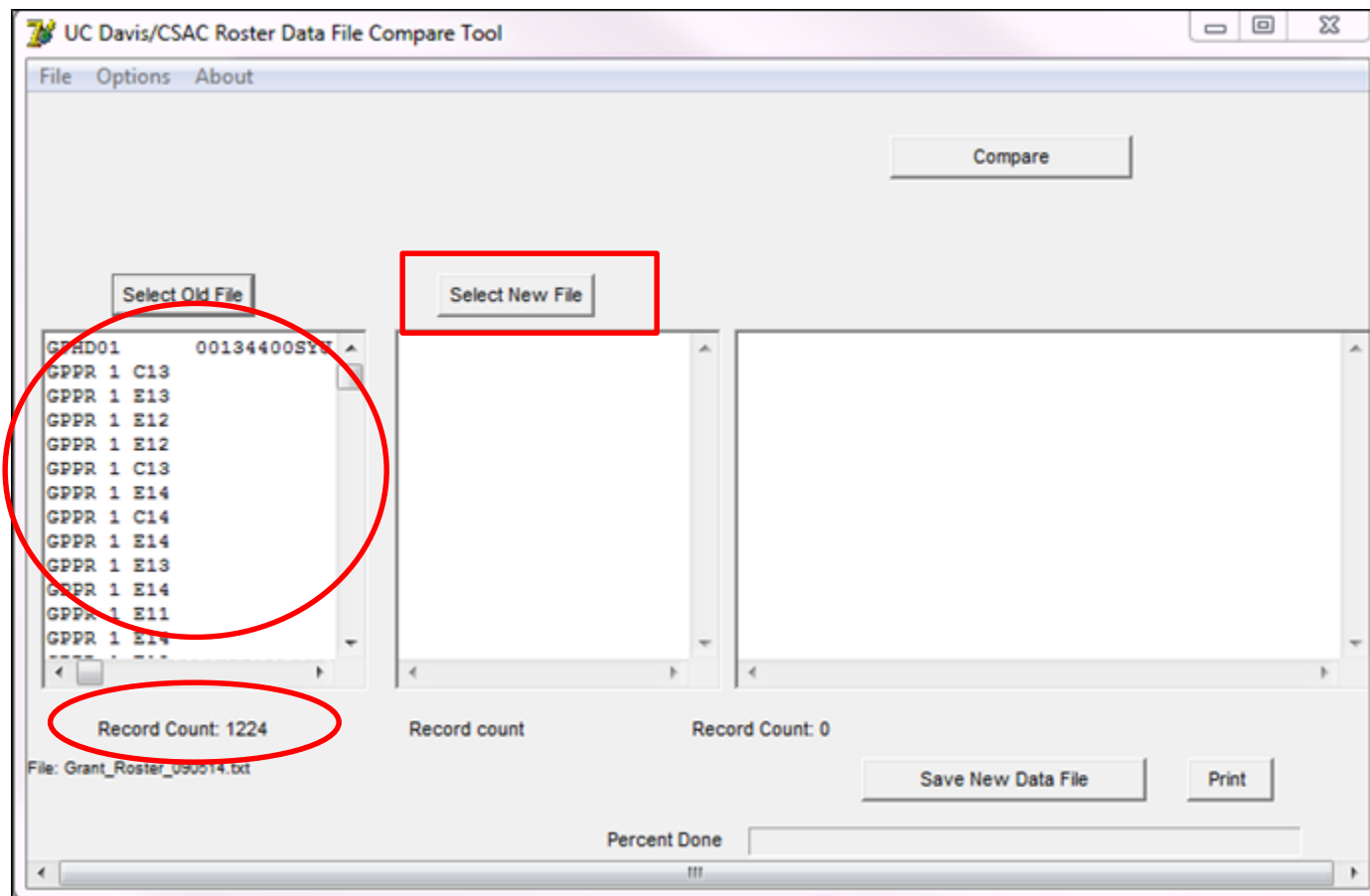
# Roster Data File Compare



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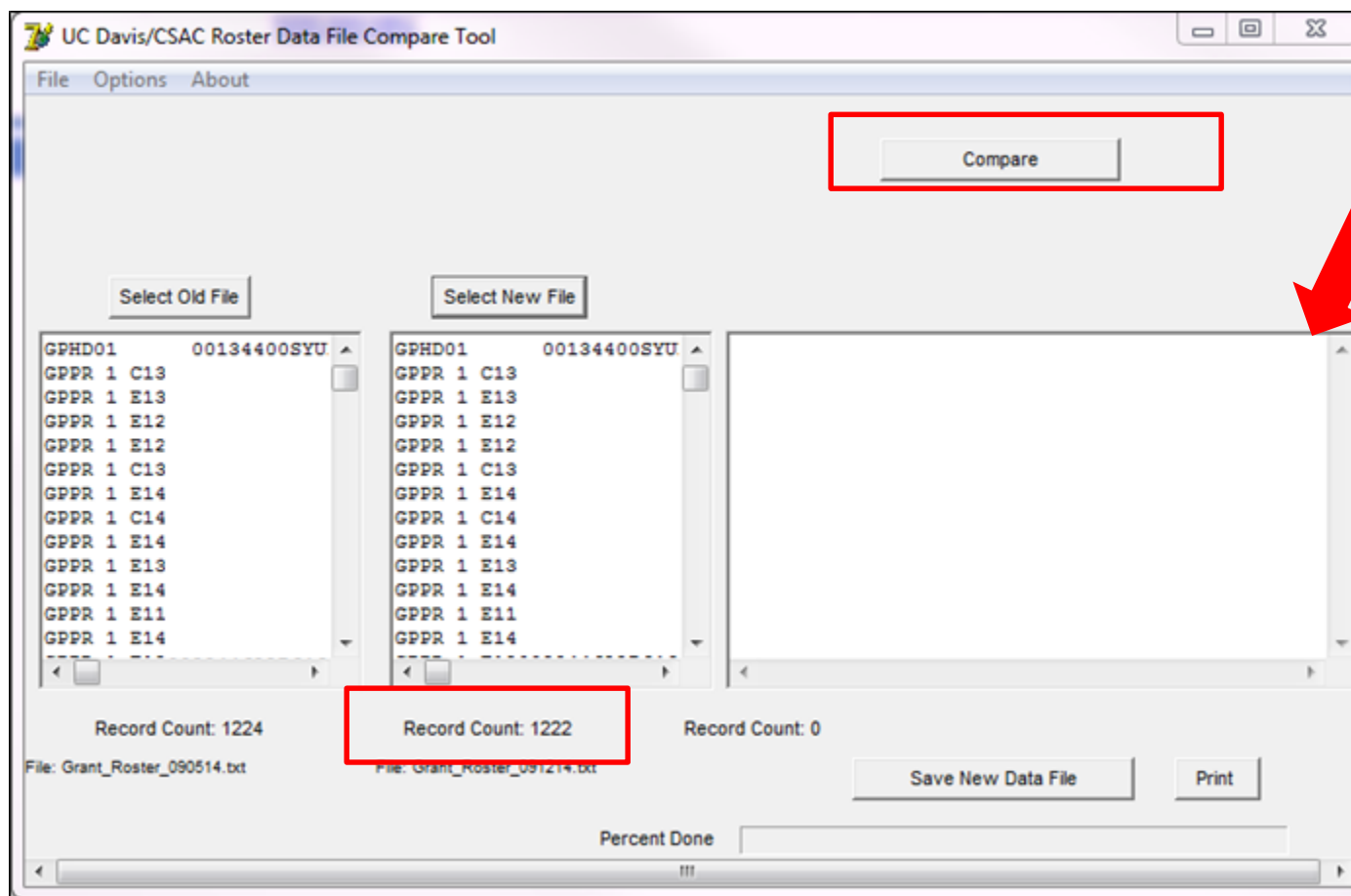
# Roster Data File Compare



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# Roster Data File Compare



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# Roster Data File Compare

The screenshot shows the 'UC Davis/CSAC Roster Data File Compare Tool' window. It has a menu bar with 'File', 'Options', and 'About'. A 'Compare' button is at the top right. Below it are 'Select Old File' and 'Select New File' buttons. A red box highlights the 'Display Choices' section, which contains four radio buttons: 'Results File', 'Dropped Records' (selected), 'Changed Records', and 'First Time on Roster'. The main area has three text boxes displaying roster data. The first two boxes show a list of records with IDs like 'GPHD01' and '00134400SYU'. The third box shows a comparison of two records, 'MALDONADO' and 'VILLA', with their respective IDs. At the bottom, there are buttons for 'Save Dropped Data' and 'Print', and a 'Percent Done' progress bar.

UC Davis/CSAC Roster Data File Compare Tool

File Options About

Compare

Select Old File Select New File

Display Choices

- ☐ Results File
- ☒ Dropped Records
- ☐ Changed Records
- ☐ First Time on Roster

Record Count: 1224 Record Count: 1222 Drop Records: 2

File: Grant\_Roster\_090514.txt File: Grant\_Roster\_091214.txt

Save Dropped Data Print

Percent Done

# Grant Roster Data File

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# Grant Roster Data File

- Report payments using batch upload process

CALIFORNIA STUDENT AID COMMISSION GRANT PAYMENT SYSTEM CAL GRANT ROSTER ELECTRONIC RECORD LAYOUT				
GRANT ROSTER HEADER RECORD				
For assistance on technical submission issues, please call the CSAC Technology Help Desk at (888) 294-0148. For assistance on programmatic issues, please call CSAC School Support Services at (888) 294-0153.				
FIELD DESCRIPTION	LENGTH	MODE	POSITION	DEFAULT / VALID VALUES
Transaction Code	4	A/N	1-4	GPHD
Data Media	2	N	5-6	09 = Data Transfer Facility
Filler	6	A/N	7-12	Blank
Submitter Identification	8	A/N	13-20	Required USDE code number
Submitter Source Code	1	A/N	21-21	Required S = School
Submitter Name	32	A/N	22-53	Required School name
Processing Date	8	N	54-61	Required CCYYMMDD
Academic Year	4	N	62-65	Required YYYY
Filler	415	A/N	66-480	Blank

RecordLayout\_GrantRoster.doc  
Last layout change 04-01-13  
Last edit descriptions 02/19/2014


MISSION GRANT PAYMENT SYSTEM CAL GRANT ROSTER ELECTRONIC RECORD LAYOUT		
GRANT ROSTER INPUT DETAIL RECORD		
MODE	POSITION	DEFAULT / VALID VALUES
A/N	1-4	Required GPHD
A/N	5-5	Required A = Add U = Update
A/N	6-7	Blank
A/N	8-16	Required First character will always be a C, E or G 0 - 9 for remaining characters
N	17-25	Required 001010001 - 999999999
A/N	26-26	Blank
A/N	27-45	Blank = no last name
A/N	46-56	Blank = no first name
A/N	57-57	Blank = no value reported
A/N	58-65	Required YYYYMMDD
66-66		Required A = Cal Grant A B = Cal Grant B C = Cal Grant C
67-74		Blank
75-75		1 = On campus housing 2 = Off campus housing 3 = With par/relatives
76-85		Blank
86-90		Optional 00000 - 99999 (dollars only, no cents) Right justify, zero fill Blank = default



# Grant Roster Data File

[Data Transfer](#) [File Upload](#) [Report Download](#) [SSN/ID Main](#)

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**Data Transfer Menu**  
[File Upload](#)  
[Report Download](#)   
[SSN/ID Main](#)

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



# Grant Roster Data File

[Data Transfer](#) [File Upload](#) [Report Download](#) [SSN/ID Main](#)

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**Report Download**

- ✦ To download or display a report or data file click on the Retrieve File button.
- ✦ All data columns can be sorted either ascending or descending order by clicking on the blue column headings.
- ✦ To compare two roster files, select Grant Roster for Report and Data File for Media Type.
- ✦ To delete uploaded Audit Files, select Audit File for Report and the Delete checkbox column will appear.

School ID =

Acad Year = 2018-2019 ▼

Month = All ▼

Report = Grant Roster ▼

Media Type = All ▼

GO!

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Revision: 13 Date: 2/4/2015 10:25:08 AM



# Grant Roster Data File

School ID =

Acad Year =

Month =

Report =

Media Type =

GO!

Report Date	Description	Media Type	Month	
12-OCT-18	Grant Roster	Data File	OCT	<input type="button" value="Retrieve File"/>
05-OCT-18	Grant Roster	Data File	OCT	<input type="button" value="Retrieve File"/>
27-SEP-18	Grant Roster	Data File	SEP	<input type="button" value="Retrieve File"/>
21-SEP-18	Grant Roster	Data File	SEP	<input type="button" value="Retrieve File"/>
14-SEP-18	Grant Roster	Data File	SEP	<input type="button" value="Retrieve File"/>
07-SEP-18	Grant Roster	Data File	SEP	<input type="button" value="Retrieve File"/>
31-AUG-18	Grant Roster	Data File	AUG	<input type="button" value="Retrieve File"/>



# Grant Roster Data File

[Data Transfer](#) [File Upload](#) [Report Download](#) [SSN/ID Main](#)

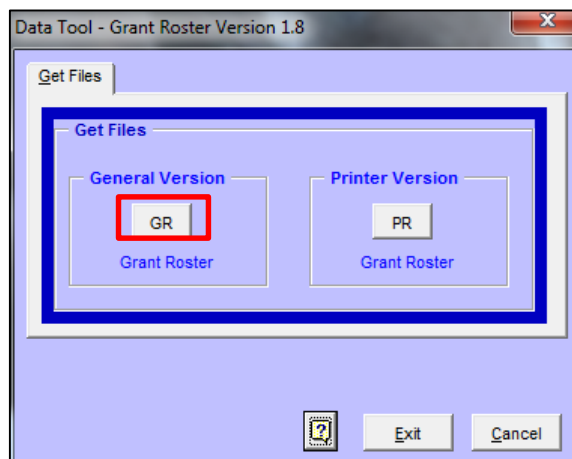
---

- ✦ To view, select the Display/Download link.
- ✦ To download, right click on the Display/Download link and choose the "Save" option.

[Display/Download](#)



# Grant Roster Data File



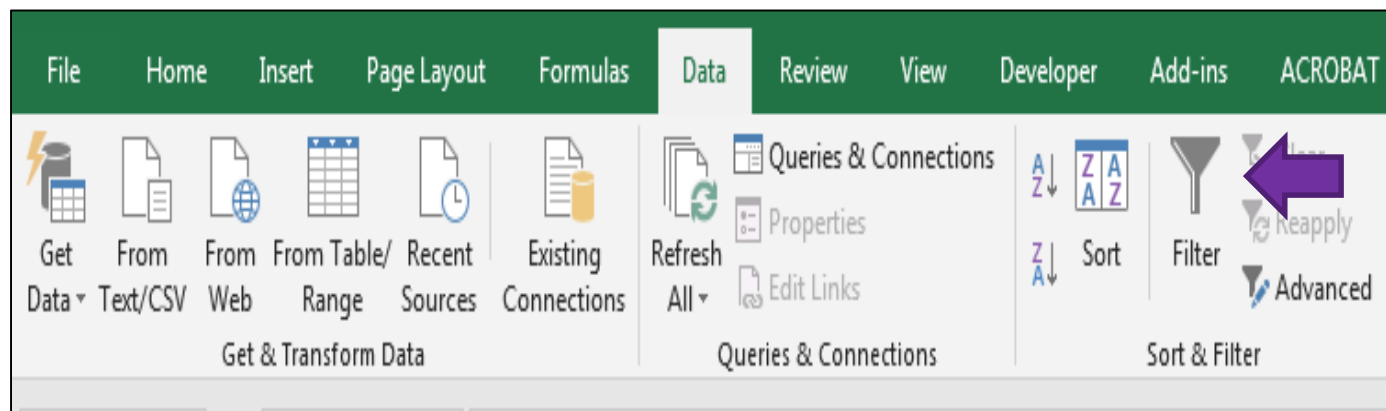


# Grant Roster Data File

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
	Transaction Code	Action Code Flag	Section Indicator	Grant ID Number	Grant ID Flag	Social Security Number	Social Security Flag	Last Name	First Name	Middle Initial	Date of Birth	Program Code	Program Code Flag	Dependency Status	New-Renew Indicator	El Code
1	GPPR		1		E12	000000000						A	-E1	D	R	2
2	GPPR		1		E13	000000000						A	-E1	D	R	1
3	GPPR		1		E12	000000000						A	-E1	D	R	2
5	GPPR		1		E13	000000000						B	-E2	D	R	3
6	GPPR		1		E13	000000000						A	-E1	D	R	1
7	GPPR		1		E11	000000000						B	-E1	D	R	3
8	GPPR		1		E13	000000000						A	-E1	D	R	1
9	GPPR		1		E11	000000000						A	-E1	D	R	3
10	GPPR		1		E14	000000000						A	-E1	D	N	1
P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD		
El Code	Flag	Housing Code	CSAC Amount	Budget Amount	EFC Need	Adjusted Need	Remaining Eligibility	Forecasted AY Eligibility	Annual Award Amount	Annual Tuition/Fee Amount	Annual Access Amount	Annual Books & Supplies Amount	Fall Total Amount	Fall Tuition/Fee Amount		
2		2	\$28,929	\$0	\$20,070		133.36%	100.00%	\$12,192	\$12,192	\$0	\$0	\$4,064.00	\$4,064.00		
1		1	\$33,802	\$0	\$33,802		233.35%	100.00%	\$12,192	\$12,192	\$0	\$0	\$4,064.00	\$4,064.00		
2		1	\$33,802	\$0	\$32,342		133.36%	100.00%	\$12,192	\$12,192	\$0	\$0	\$4,064.00	\$4,064.00		
3		2	\$28,929	\$0	\$26,971		33.35%	100.00%	\$13,840	\$12,192	\$1,648	\$0	\$4,613.00	\$4,064.00		
1		1	\$33,802	\$0	\$31,600		400.00%	100.00%	\$12,192	\$12,192	\$0	\$0	\$0.00	\$0.00		
3		3	\$25,737	\$0	\$25,737		133.34%	100.00%	\$13,840	\$12,192	\$1,648	\$0	\$4,613.00	\$4,064.00		
1		1	\$33,802	\$0	\$30,641		233.35%	100.00%	\$12,192	\$12,192	\$0	\$0	\$4,064.00	\$4,064.00		
3		1	\$33,802	\$0	\$33,802		100.03%	100.00%	\$12,192	\$12,192	\$0	\$0	\$4,064.00	\$4,064.00		
1		1	\$33,802	\$0	\$33,802	*****	333.34%	100.00%	\$12,192	\$12,192	\$0	\$0	\$4,064.00	\$4,064.00		

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# Grant Roster Data File



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# Grant Roster Data File

Transaction Code	Action Code	Section Indicator	Grant ID Number	Grant ID Number	Social Security	Social Security	Last Name	First Name	Middle Initial	Date of Birth	Program Code	Program Code	Dependency Status	New-Renew Indicator	EI Code	EI Code	Housing Code	CSAC Budget Amount	Budget	EFC Amount	EFC Need
GPPR			1								A	-E1	D	R	4	2			\$27,145	\$0	\$27
GPPR			1								A	-E1	D	R	4	3			\$17,931	\$0	\$13
GPPR			1								A	V-E2	D	N	3	3			\$17,931	\$5,188	\$12
GPPR			1								A	-E1	D	R	2	2			\$27,145	\$0	\$18
GPPR			1								A	-E1	D	N	2	3			\$17,931	\$4,131	\$13
GPPR			1								A	-E1	D	R	2	1			\$28,166	\$0	\$13
GPPR			1								B	-E2	I	R	4	2			\$27,145	\$0	\$27
GPPR			1								B	-E1	D	R	2	3			\$17,931	\$0	\$17
GPPR			1								B	-E1	D	N	1	1			\$28,166	\$0	\$28
GPPR			1								B	-E1	D	N	1	3			\$17,931	\$0	\$17
GPPR			1								B	*-E2	D	N	3	2			\$27,145	\$0	\$27
GPPR			1								B	-E1	D	N	1	1			\$28,166	\$113	\$28
GPPR			1								B	-C2	I	R	3	1			\$28,166	\$0	\$28
GPPR			1								B	*-E2	D	N	3	2			\$27,145	\$0	\$27
GPPR			1								B	-E1	D	R	4	1			\$28,166	\$0	\$28
GPPR			1								B	-E2	I	R	4	1			\$28,166	\$0	\$28
GPPR			1								B	-C1	I	R	4	2			\$27,145	\$0	\$27
GPPR			1								B	-E1	D	R	2	3			\$17,931	\$0	\$17
GPPR			1								B	*-E2	D	N	3	3			\$17,931	\$1,522	\$16
GPPR			1								B	-E1	D	R	2	2			\$27,145	\$0	\$26
GPPR			1								A	-E1	D	N	1	3			\$17,931	\$6,183	\$11
GPPR			1								B	-E1	D	N	1	1			\$28,166	\$1,832	\$26
GPPR			1								B	-E1	D	R	3	1			\$28,166	\$0	\$28
GPPR			1								B	-E1	D	R	4	1			\$28,166	\$0	\$28
GPPR			1								B	*-E2	D	N	3	2			\$27,145	\$0	\$27
GPPR			1								A	-E1	D	R	3	1			\$28,166	\$0	\$23
GPPR			1								B	-E1	D	N	1	2			\$27,145	\$0	\$27
GPPR			1								B	-E1	D	R	4	2			\$27,145	\$0	\$26
GPPR			1								B	-E1	D	R	3	3			\$17,931	\$0	\$17
GPPR			1								B	-E2	I	N	3	3			\$17,931	\$0	\$17
GPPR			1								B	*-E2	D	N	2	2			\$27,145	\$1,078	\$26
GPPR			1								B	-E1	D	N	1	1			\$28,166	\$586	\$27
GPPR			1								A	-E1	D	R	3	3			\$17,931	\$0	\$9
GPPR			1								B	-E1	D	R	2	1			\$28,166	\$0	\$28
GPPR			1								B	-C1	I	R	3	2			\$27,145	\$0	\$27
GPPR			1								A	*-E2	D	N	3	3			\$17,931	\$1,777	\$16
GPPR			1								A	-E1	D	R	2	1			\$28,166	\$0	\$21
GPPR			1								A	-E1	D	R	2	3			\$17,931	\$0	\$15
GPPR			1								B	-E1	D	R	4	1			\$28,166	\$0	\$27
GPPR			1								B	-C1	I	N	3	2			\$27,145	\$0	\$27
GPPR			1								B	-E2	I	R	3	3			\$17,931	\$0	\$13
GPPR			1								B	-E1	D	R	2	1			\$28,166	\$0	\$27
GPPR			1								B	-E1	D	R	3	1			\$28,166	\$0	\$28
GPPR			1								B	-E1	D	N	1	1			\$28,166	\$504	\$27

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# Reconciliation Data File

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# Reconciliation Data File

WebGrants Menu
<a href="#">Enrollment</a>
<a href="#">GPA</a>
<a href="#">Student Info</a>
<a href="#">School Info</a>
<a href="#">Roster/Reconciliation</a>
<a href="#">Data Transfer</a>
<a href="#">Chafee Grant</a>
<a href="#">NON-SSN GPA</a>



# Reconciliation Data File

## Reconciliation

[Customize Reconciliation](#)

[Display Reconciliation](#)

[Display Accept / Reject Report](#)



# Reconciliation Data File

## Display Reconciliation

- ✦ Select either Report or Data file from Display Type. For Report, selecting **Detail** will produce student level information; **Summary** will provide totals. You may select either or both of the **Report** boxes.
- ✦ Reports will display in a text file format. They can be printed using your Web browser.
- ✦ Data Files will display in a text file format and may be saved to your computer. The Tools Menu contains a program that will format the data file using Excel.
- ✦ If you are using Netscape, select the Display/Download link to view. Then use your browser **Save** option to download.

Display Type: Detail Report ☐ Summary Report ☐ **Detail Data ☐**

School ID =

Acad Year = 2018-2019 ▼

Format = CSAC Standard Reconciliation ▼



### Basic Report Filter for CSAC Standard Format Only

*The purpose of this secondary filter is to provide schools with a basic reconciliation tool. After viewing the Reconciliation Summary and identifying areas of discrepancy, schools can use the filter options below to obtain student level data for each summary subtotal.*

- ✦ Select the combination of Term, Program Code and Award Type that matches the subtotal or total you are trying to verify. ( For more complex filters, use the Customize feature.)

Basic Report Filter: Term  ▼ Program Code  ▼ Award Type  ▼





# Reconciliation Data File

[Roster/Reconciliation](#) [Customize Roster](#) [Display Roster](#) [Print Roster](#) [Customize Reconciliation](#) [Display Reconciliation](#) [Display Accept / Reject Report](#)

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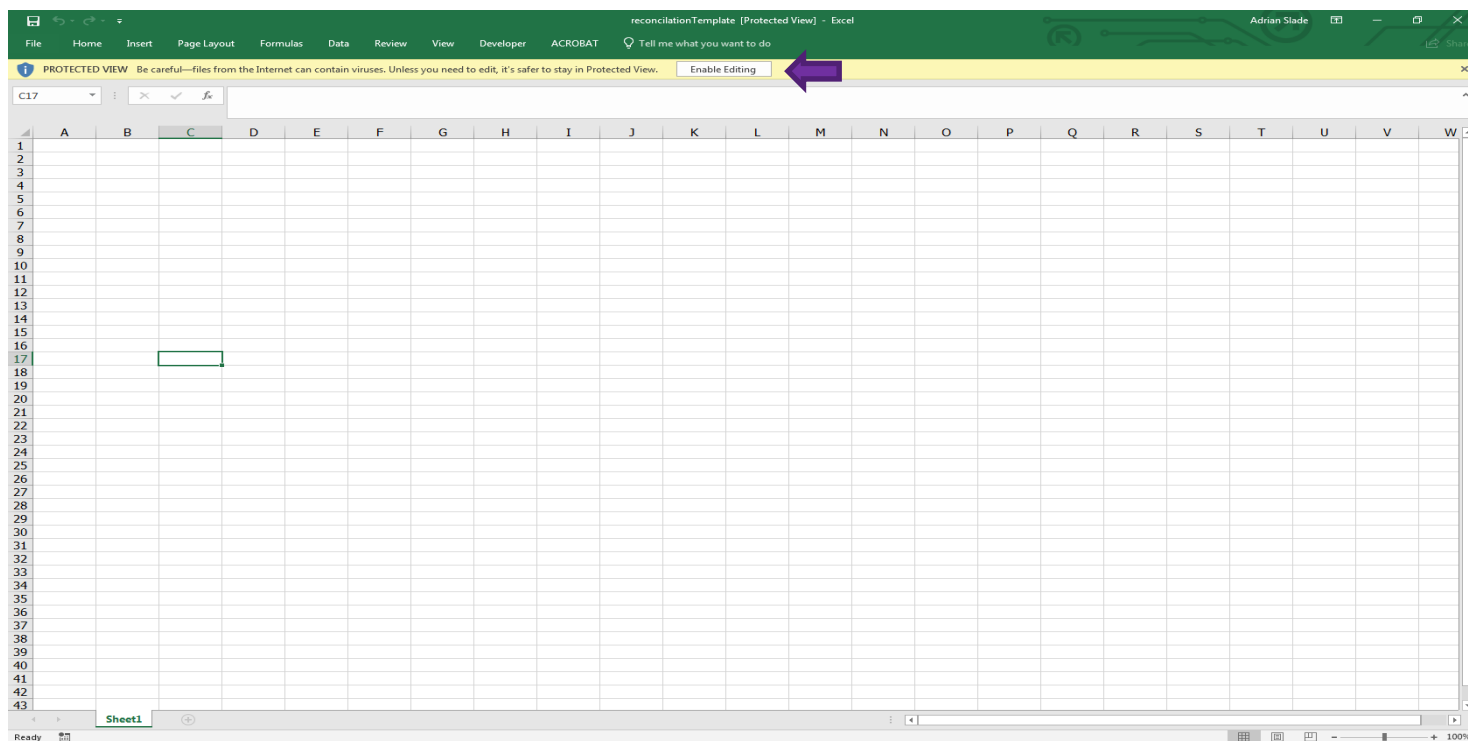
- ♦ To view, select the Display/Download link.
- ♦ **To download, right click on the Display/Download link and choose the "Save" option.**
- ♦ If you are using Netscape, select the Display/Download link to view. Then use your browser "Save" option to download.

[Display/Download](#)

close



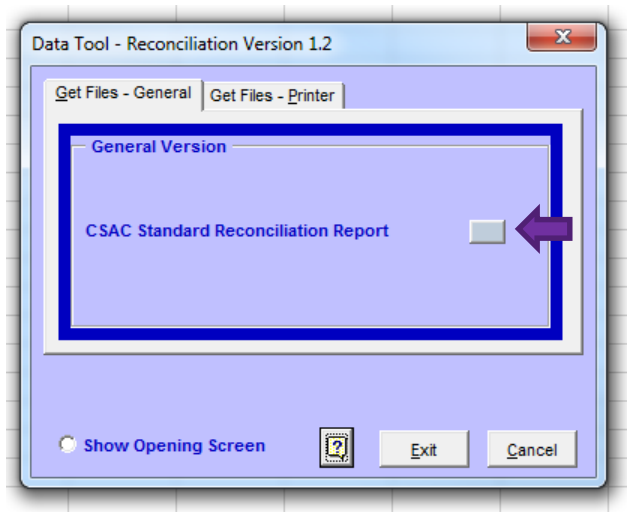
# Reconciliation Data File



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# Reconciliation Data File







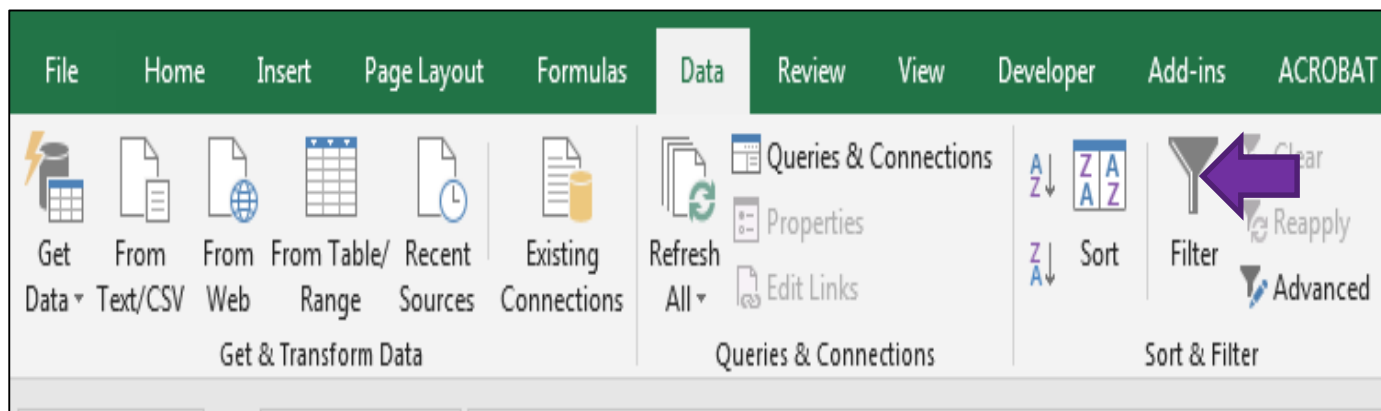
# Reconciliation Data File

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
	Last Name	First Name	Middle Initial	Social Secur	Grant ID	Cycle	New/Renew	Student	School Progra	Ter	Grant Progra	Award Ty	Pay Stat	Adjustment Ar	Adjustment Reas	Adjustment Da	Disbursement Ar
1						E1	R	4	00	FL	B	T/F	RP	0			2,871
2						E1	R	4	00	FL	B	ACS	RP	0			836
3						E1	R	2	00	FL	B	T/F	RP	0			2,871
4						E1	R	2	00	FL	B	ACS	RP	0			836
5						E1	R	4	00	FL	A	T/F	RP	0			2,871
6						E1	R	5	00	FL	A	T/F	RP	0			2,871
7						E2	R	4	00	FL	A	T/F	RA	1,436	HT	101218	1,436
8						E2	R	4	00	FL	B	T/F	RA	2,153	TT	100818	2,153
9						E2	R	4	00	FL	B	ACS	RA	627	TT	100818	627
10						E1	R	3	00	FL	B	T/F	RP	0			2,871
11						E1	R	3	00	FL	B	ACS	RP	0			836
12						E1	R	4	00	FL	B	T/F	RP	0			2,871
13						E1	R	4	00	FL	B	ACS	RP	0			836
14						E1	R	4	00	FL	A	T/F	RA	0	SR	101218	0
15						E1	R	4	00	FL	B	T/F	RP	0			1,436
16						E1	R	4	00	FL	B	ACS	RP	0			418
17						E1	R	4	00	FL	B	T/F	RP	0			2,871
18						E1	R	3	00	FL	B	ACS	RP	0			836
19						E1	R	3	00	FL	B	T/F	RP	0			2,871
20						E1	R	3	00	FL	B	ACS	RP	0			836
21						E1	R	4	00	FL	B	T/F	RP	0			718
22						E1	R	4	00	FL	B	ACS	RP	0			209
23						E1	R	4	00	FL	B	T/F	RP	0			2,871
24						E1	R	4	00	FL	B	ACS	RP	0			836
25						E1	R	4	00	FL	B	T/F	RP	0			2,871
26						E1	R	4	00	FL	B	ACS	RP	0			836
27						E1	R	4	00	FL	B	T/F	RP	0			2,871
28						E1	R	4	00	FL	B	ACS	RP	0			836
29						E1	R	4	00	FL	B	T/F	RP	0			2,871
30						E1	R	4	00	FL	B	ACS	RA	2,153	TT	101218	2,153
31						E1	R	4	00	FL	B	ACS	RA	627	TT	101218	627
32						E1	R	2	00	FL	B	T/F	RP	0			2,871
33						E1	R	2	00	FL	B	ACS	RP	0			836
34						E1	R	4	00	FL	A	T/F	RP	0			2,871
35						E1	R	4	00	FL	B	T/F	RP	0			2,871
36						E1	R	4	00	FL	B	ACS	RP	0			836
37						E1	R	4	00	FL	B	T/F	RP	0			2,871
38						E1	R	4	00	FL	B	ACS	RP	0			836
39						E1	R	4	00	FL	B	T/F	RA	539	TT	101218	539
40						E1	R	4	00	FL	B	ACS	RA	157	TT	101218	157
41						E1	R	4	00	FL	A	T/F	RP	0			2,871
42						E1	R	4	00	FL	A	T/F	RP	0			718
43						E1	R	2	00	FL	A	T/F	RP	0			2,871
44						E1	R	3	00	FL	B	T/F	RP	0			2,871
45						E1	R	3	00	FL	B	ACS	RP	0			836
46						E1	R	4	00	FL	B	T/F	RP	0			1,436

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# Reconciliation Data File





# Reconciliation Data File

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Last Name	First Name	Middle Init	Social Secur	Grant ID	Cycle	New/Renew	Student	School Progra	Ter	Grant Progra	Award Ty	Pay Stat	Adjustment Ar	Adjustment Reas	Adjustment Da	Disbursement Ar
2					E13515326	E1	R	4	00	FL	B	T/F	RP	0			2,871
3					E13515326	E1	R	4	00	FL	B	ACS	RP	0			836
4					E13588056	E1	R	2	00	FL	B	T/F	RP	0			2,871
5					E13588056	E1	R	2	00	FL	B	ACS	RP	0			836
6					E14844359	E1	R	4	00	FL	A	T/F	RP	0			2,871
7					E13620346	E1	R	5	00	FL	A	T/F	RP	0			2,871
8					E16370620	E2	R	4	00	FL	A	T/F	RA	1,436	HT	101218	1,436
9					E16370229	E2	R	4	00	FL	B	T/F	RA	2,153	TT	100818	2,153
10					E16370229	E2	R	4	00	FL	B	ACS	RA	627	TT	100818	627
11					E13622849	E1	R	3	00	FL	B	T/F	RP	0			2,871
12					E13622849	E1	R	3	00	FL	B	ACS	RP	0			836
13					E15033928	E1	R	4	00	FL	B	T/F	RP	0			2,871
14					E15033928	E1	R	4	00	FL	B	ACS	RP	0			836
15					E13691657	E1	R	4	00	FL	A	T/F	RA	0	SR	101218	0
16					E14829327	E1	R	4	00	FL	B	T/F	RP	0			1,436
17					E14829327	E1	R	4	00	FL	B	ACS	RP	0			418
18					E14850033	E1	R	4	00	FL	B	T/F	RP	0			2,871
19					E14850033	E1	R	4	00	FL	B	ACS	RP	0			836
20					E14850038	E1	R	3	00	FL	B	T/F	RP	0			2,871
21					E14850038	E1	R	3	00	FL	B	ACS	RP	0			836
22					E14813163	E1	R	4	00	FL	B	T/F	RP	0			718
23					E14813163	E1	R	4	00	FL	B	ACS	RP	0			209
24					E14855186	E1	R	4	00	FL	B	T/F	RP	0			2,871
25					E14855186	E1	R	4	00	FL	B	ACS	RP	0			836
26					E14807850	E1	R	4	00	FL	B	T/F	RP	0			2,871
27					E14807850	E1	R	4	00	FL	B	ACS	RP	0			836
28					E14849016	E1	R	4	00	FL	B	T/F	RP	0			2,871
29					E14849016	E1	R	4	00	FL	B	ACS	RP	0			836
30					E14764848	E1	R	4	00	FL	B	T/F	RA	2,153	TT	101218	2,153
31					E14764848	E1	R	4	00	FL	B	ACS	RA	627	TT	101218	627
32					E14837686	E1	R	2	00	FL	B	T/F	RP	0			2,871
33					E14837686	E1	R	2	00	FL	B	ACS	RP	0			836
34					E14818650	E1	R	4	00	FL	A	T/F	RP	0			2,871
35					E14837469	E1	R	4	00	FL	B	T/F	RP	0			2,871
36					E14837469	E1	R	4	00	FL	B	ACS	RP	0			836
37					E14846279	E1	R	4	00	FL	B	T/F	RP	0			2,871
38					E14846279	E1	R	4	00	FL	B	ACS	RP	0			836
39					E15128121	E1	R	4	00	FL	B	T/F	RA	539	TT	101218	539
40					E15128121	E1	R	4	00	FL	B	ACS	RA	157	TT	101218	157
41					E14837230	E1	R	4	00	FL	A	T/F	RP	0			2,871
42					E14852303	E1	R	4	00	FL	A	T/F	RP	0			718
43					E14837124	E1	R	2	00	FL	A	T/F	RP	0			2,871
44					E14801325	E1	R	3	00	FL	B	T/F	RP	0			2,871
45					E14801325	E1	R	3	00	FL	B	ACS	RP	0			836
46					F14943010	F1	R	4	00	FL	B	T/F	RP	0			1,436

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# Customizing Your Roster

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# Customizing Your Roster

**California Student Aid Commission (SAPRD)**

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# Customizing Your Roster


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**WebGrants System**[Enrollment](#)[GPA](#)[Student Info](#)[School Info](#)[Roster/Reconciliation](#)[Data Transfer](#)[Chafee Grant](#)[Accounting](#)[Web Service Registration](#)[NON-SSN GPA](#)

[Roster/Reconciliation](#)[Customize Roster](#)[Display Roster](#)[Print Roster](#)[Customize Reconciliation](#)[Display Reconciliation](#)[Display Accept / Reject Report](#)[Override Supplement Payment](#)

### Customize Roster

- ♦ The following is a list of your roster formats.
- ♦ The CSAC Standard Roster format can not be changed or deleted.
- ♦ Existing roster formats can be copied, edited and renamed.
- ♦ Any roster format can be chosen as the "Preferred Format." The Preferred Format will display automatically when "Display Roster" is selected from the Roster Main menu.



Row #	Name	Preferred Format	Edit	Delete
1	<a href="#">CSAC Standard Roster</a>	<input type="radio"/>		



# Customizing Your Roster

**Roster Format Title**

**Roster Format**  **Preferred** ☐ Yes ☒ No

**Select Data Elements and Column Order**

- "Data Elements Available" contains a list of all available roster elements.
- Click and highlight each data element that you wish to display on your roster.
- For multiple selections, click on the first element and then hold down the CTRL key to select additional elements.
- Once items are highlighted, click on "Add Data Element(s)".
- The "Data Elements Selected" box will reflect the column headings that will display on your roster format.
- "Remove Data Element(s)" will delete the selected elements from your selection list.
- Use the "Move Up" and "Move Down" to order the individual column headings for display.
- After selecting data elements, click "Continue" to choose sort options.

**Data Elements Available**

Add Data Element(s)

Remove Data Element(s)

**Data Elements Selected**

SSN  
DOB  
Grant ID  
Cycle ID  
Housing Code  
Dep Status  
New / Renewal  
EL Code  
CSAC Budget  
EFC

Move Up

Move Down



# Customizing Your Roster

## Select Data Elements and Column Order

- "Data Elements Available" contains a list of all available roster elements.
- Click and highlight each data element that you wish to display on your roster.
- For multiple selections, click on the first element and then hold down the CTRL key to select additional elements.
- Once items are highlighted, click on "Add Data Element(s)".
- The "Data Elements Selected" box will reflect the column headings that will display on your roster format.
- "Remove Data Element(s)" will delete the selected elements from your selection list.
- Use the "Move Up" and "Move Down" to order the individual column headings for display.
- After selecting data elements, click "Continue" to choose sort options.

### Data Elements Available

Add Data Element(s)

Remove Data Element(s)

### Data Elements Selected

SSN  
DOB  
Grant ID  
Cycle ID  
Housing Code  
Dep Status  
New / Renewal  
EL Code  
CSAC Budget  
EFC

Move Up

Move Down

## Select Terms

- Select the term(s) you wish to display
- Selecting only one(1) term will allow users to sort records by term-specific data elements
- After selecting term(s), click "Continue" to choose sort options





# Customizing Your Roster

### Select Terms

- Select the term(s) you wish to display
- Selecting only one(1) term will allow users to sort records by term-specific data elements
- After selecting term(s), click "Continue" to choose sort options

☐ Fall☐ Winter☐ Spring☐ Summer

Continue

### Define Sort Order Preferences

Click drop down boxes to choose elements for sort.

First Sort Preference	Roster Section	Ascending
Second Sort Preference	Last Name	Ascending
Third Sort Preference	First Name	Ascending
Fourth Sort Preference	Middle Initial	Ascending
Fifth Sort Preference	SSN	Ascending
Sixth Sort Preference		Ascending

### Define Selection Criteria

- Check boxes below to limit the records you wish to display.
- A checked box means that only records with those values will be included. ( If no box or every box is checked in a category, you will see all those records for your school. )



# Customizing Your Roster

**Define Selection Criteria**

Check boxes below to limit the records you wish to display.  
A checked box means that only records with those values will be included. ( If no box or every box is checked in a category, you will see all those records for your school. )

<b>Cycle ID</b>	<input type="checkbox"/> E1	<input type="checkbox"/> E2	<input checked="" type="checkbox"/> C1	<input checked="" type="checkbox"/> C2
<b>Award Type</b>	<input type="checkbox"/> Tuition/Fees	<input type="checkbox"/> Access	<input type="checkbox"/> Books & Supplies	
<b>Housing Code</b>	<input type="checkbox"/> On Campus (1)	<input type="checkbox"/> Off Campus (2)	<input type="checkbox"/> With Parents (3)	
<b>Dependency Status</b>	<input type="checkbox"/> Dependent	<input type="checkbox"/> Independent		
<b>EL (Education Level)</b>	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4 <input type="checkbox"/> 5+
<b>EL Status</b>	<input type="checkbox"/> Verification Not Required (1)		<input type="checkbox"/> Not Paid, Verif Required (2)	
	<input type="checkbox"/> Verified As Reported (3)		<input type="checkbox"/> Verified with Change (4)	
	<input type="checkbox"/> Unable to Verify (5)		<input type="checkbox"/> Paid, Verification Required (6)	
<b>New/Renewal Students</b>	<input checked="" type="checkbox"/> New	<input type="checkbox"/> Renewal		
<b>Program Code</b>	<input type="checkbox"/> A	<input checked="" type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> T
<b>Section</b>	<input checked="" type="checkbox"/> Eligible	<input checked="" type="checkbox"/> CC Reserve	<input checked="" type="checkbox"/> Ineligible	<input type="checkbox"/> Not In Attendance
<b>Extra Eligibility</b>	<input type="checkbox"/> TCP	<input type="checkbox"/> 5th Year	<input type="checkbox"/> Not TCP nor 5th Year	
<b>E1 On Hold Status</b>	<input type="checkbox"/> Verification Required		<input checked="" type="checkbox"/> Verification Completed	
	<input type="checkbox"/> Verification Not Required			
<b>E2 On Hold Status</b>	<input type="checkbox"/> Waiting for G6 Return		<input type="checkbox"/> Requires Verification by School	
	<input type="checkbox"/> School Verified Eligible		<input type="checkbox"/> School Verified Ineligible	

Save Roster Format

Making

ornians.



# Customizing Your Roster

## Online Roster

- Be sure to save all entries before exiting the Roster or changes will be lost.
- Please note that Leave of Absence (LA) payment transactions for newly awarded Competitive Cal Grant students will not be accepted. Only student initiated LA transactions will be accepted via WebGrants for Students or by contacting CSAC.**

School ID =	<input type="text"/>	Acad Year =	2017 - 2018 ▼	Format =	CSAC Standard Roster ▼	Search =	SSN ▼	<input type="text"/>	GO!
					CSAC Standard Roster				
					New Unpaid Comp CGB				

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Revision: 35 Date: 8/21/2014 1:59:38 PM



## **Institutional Support**

Phone: 1 (888) 294-0153

Fax: 1 (916) 464-6499

[SchoolSupport@csac.ca.gov](mailto:SchoolSupport@csac.ca.gov)

[www.csac.ca.gov](http://www.csac.ca.gov)

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