



Cal Grant and WebGrants Overview

Presented by:

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California Student Aid Commission

Program Administration and Services Division



Contents

- Resources
 - Application Process
 - WebGrants Reports
 - Cash Management and Disbursement
- Customizing Your Roster and Reports
 - Reconciliation

RESOURCES





Who to Contact ?

School Support Services

schoolsupport@csac.ca.gov

(888) 294 -0153

M – TH and every 4th Friday from 8:00 a.m. to 5:00 p.m.

Closed from 12 - 1

– Press option 1 for:

- Web Grants Roster help
 - New/adjusted payments
 - Student Status
 - Calculating Need
- Web Grants Reports
 - Accept/Reject
 - GPA
 - Other Reports

– Press option 2 for:

- Specialized Programs Operations
 - Chafee
 - APLE
 - Robert C. Byrd
 - All other Specialized Programs

– Press option 3 for:

- Program Policy
- IPA
- Training
- Cal Grant manual



Help!



Who to Contact ?

Customer Relations Branch

For students

studentsupport@csac.ca.gov

(888) 224 -7268

M – TH and every 4th Friday

1:00 p.m. to 5:00 p.m.

Closed 12 - 1

Students may also access their Cal Grant and Chafee Grant information 24 hours a day on WebGrants for Students at www.webgrants4students.org



Who to Contact ?

Technology Help Desk

csachelpdesk@csac.ca.gov

(888) 294 -0148 or

(916) 526-8989

- Contact the Help Desk for:
 - Web Grants Access issues
 - Web Grants password changes
 - Changes to required Web Grants system agreements
 - Changes to system administrators/users



Sign Up for CSAC List Serv

- Step 1
 - Go to <http://www.csac.ca.gov/login.asp>
 - Or, www.csac.ca.gov – Links – CSAC List Serv
- Step 2
 - Enter Username: **students**
 - Enter Password: **1SEC2001**
- Step 3
 - Enter your e-mail address
- Step 4
 - Select which communications you would like to receive by checking appropriate box
- Step 5
 - Click on “Publications” link to select specific communications



Commission Websites

- www.csac.ca.gov (Cal Grant Manual)
- www.calgrants.org High school students
- <https://webgrants.csac.ca.gov> CG schools
- www.webgrants4students.org applicants & recipients
- www.californiacashforcollege.org For workshops
- www.chafee.csac.ca.gov Chafee participants

WebGrants for Students (WGS)

WGS?

www.webgrants4students.org

- Private and secure access to Cal Grant and Chafee Grant award information, 24/7
- No need to wait on hold for a customer service representative
- Reduces student traffic in the financial aid office
- Allows students to keep their award information up to date

On WGS, students can:

- Check if their application data has been received
- Check their award status and view their payment history
- Check the address on file and update it on-line
- Simulate a school change & submit the school change on-line
- Verify high school graduation on-line
- Process a leave of absence request on-line
- Update student account on-line
- Click on links to other financial aid information and web sites

QUESTIONS?



APPLICATION PROCESS





The Applications

- FAFSA
 - Establishes financial need
 - Submitted to FAFSA on the Web (FOTW) or paper
- Grade Point Average (GPA) Verification
 - Establishes academic merit
 - Submitted via WebGrants or by mail (G-4 Cal Grant Verification Form)
- Cal Grant C Supplemental Application
- CC Enrollment Data File (Sept 2 Only)

Application Deadlines

- March 2
 - If deadline falls on a holiday, Saturday or Sunday the next business day will be the deadline
 - For Entitlement, Transfer Entitlement, Competitive (C1) and Cal Grant C
- September 2
 - 11,250 Competitive (C2) A & B awards for community college students only





GPA Types

- High school
- Reestablished (community college)
- College
- Test Scores (limited circumstances)

- Questions?
 - Electronic GPA Upload Questions, Tabitha Frost (916) 464-2113
 - School Support Branch (888) 294 -0153
 - schoolsupport@csac.ca.gov

QUESTIONS?



WebGrants Reports





WebGrants Generated Reports

- Grant Payment Roster (weekly)
- Accept/Reject Transaction Report (weekly)
- Monthly Payment Activity Report
- Unclaimed Awards Report
- Unable to Determine Eligibility Report

Grant Payment Roster

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WebGrants System

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Welcome! SA6LAN
To the WebGrants System

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

Options	Account Information
<ul style="list-style-type: none">EnrollmentGPAStudent InfoSchool InfoRoster/ReconciliationData Trans <small>Grant Roster</small>	<ul style="list-style-type: none">View Your Account DetailsHelp With Your Account



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[Customize Recon](#)

[Display Recon](#)

Roster/Reconciliation Main

Roster

◆ [Customize Roster](#)

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Grant Roster

Reconciliation

◆ [Customize Reconciliation](#)

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[Customize Recon](#)

[Display Recon](#)

Online Roster

◆ Be sure to save all entries before exiting the Roster or changes will be lost.

School ID =

Acad Year =

Format =

Search =

Grant Payment Roster

CSAC ID:											View History	Record: 2
SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Renewal	EL Code	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
	11/19/91		E1	3	D	N	1	11323	0	400.00%	100.00%	ELIGIBLE(1)
Custom Codes	1	2	3	4	5	This Entitlement record is on-hold awaiting the High School Graduation Date Verification. Once the information is verified the record will be released for payment.						
High School Grad. Date Verification			Status: Not Verified			Verify As		New Grad Date:				
(High School Grad. Date Verification through CSAC) Request By: <input type="radio"/> Student <input type="radio"/> High School <input type="radio"/> College												
Education Level (EL) Verification			Reported EL 1		Verified EL		Status 1 -- Verification Not Required					
Fall Term			Adj Reason Codes				Pay Status Codes			Delete Txn		
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
	Totals	\$1,551	\$776									
B	ACSS	\$1,551	\$776	<input type="text" value="0"/>	<input type="text"/>	RP			PAY			
Spring Term			Adj Reason Codes				Pay Status Codes			Delete Txn		
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
	Totals	\$1,551	\$775			<input type="text"/>						
B	ACSS	\$1,551	\$775	<input type="text"/>	<input type="text"/>	<input type="text"/>			GRT			



Accept/Reject Transaction Report

- Designed to provide feedback to schools on a weekly basis regarding the acceptance or rejection of payment transactions submitted by schools
- Divided into two sections:
 - Rejected transactions with reason code
 - Accepted transactions with transaction details
- Good practice - Choose a day of the week to consistently look at this report

Accept/Reject Report

ACCEPT/REJECT REPORT
ACADEMIC YEAR 2006
00799300 - CSU BAKERSFIELD

RUN DATE: 01/27/2007
RUN TIME: 00:59:18

REJECTED SECTION

GRANT ID#	SSN	STUDENT LASTNAME	FIRST NAME	I	DATE	CODE	CODE	PGM CODE	NEED	ADJ NEED	PAY TYPE	TERM	AMOUNT	ADJ RSN	PAY STATUS
E05087453	613323083	ESPINOZA	ALFONSO		01/27/2007	C	U	A	2295		T/F	FL	840.00	AF	
6780: PAY TYPE T/F: PAYMENT MORE THAN MAXIMUM AMOUNT OF \$763															

TOTALS

BATCH -	PAYMENTS REJECTED:	0	AMOUNT REJECTED:	0.00
ONLINE -	PAYMENTS REJECTED:	1	AMOUNT REJECTED:	840.00
COMBINED -	PAYMENTS COMBINED:	1	AMOUNT COMBINED:	840.00

1SABRAR2 - 01 (EDE COPY) CALIFORNIA STUDENT AID COMMISSION
ACCEPT/REJECT REPORT
ACADEMIC YEAR 2006

PAGE : 2
RUN DATE: 01/27/2007
RUN TIME: 00:59:18

ACCEPTED SECTION

GRANT ID#	SSN	STUDENT LASTNAME	FIRST NAME	M	PROCESS DATE	SRC CODE	ACT CODE	PGM CODE	NEED	ADJ NEED	PAY TYPE	TERM	AMOUNT	ADJ RSN	PAY STATUS
C05059955	380763178	ABDULAZIZ	DAWN	M	01/27/2007	C	U	B	10894		T/F ACC	WN WN	840.00 517.00		PD PD
E06001014		ACIERTO	CHARINIEL	C	01/27/2007	C	U	A	9108		T/F	WN	840.00		PD
E03008544		ACIERTO	DANICA	C	01/27/2007	C	U	A	10255		T/F	WN	840.00		PD
E05054740		ACOSTA	PATRICK	P	01/27/2007	C	U	B	10894		T/F ACC	FL FL	840.00 517.00		PD PD
E05054740		ACOSTA	PATRICK	P	01/27/2007	C	U	B	10894		T/F ACC	WN WN	840.00 517.00		PD PD
E05008366		ADATA	MARIA	D	01/27/2007	C	U	B	10855		T/F ACC	WN WN	840.00 517.00		PD PD
E06038590		AGUIAR	RAQUEL	M	01/27/2007	C	U	B	11321		ACC	WN	517.00		PD



Monthly Payment Activity Report

- Summary of the school's payment activity for the current award year including:
 - Term and supplemental advances
 - Accepted and reconciled payment transactions for each month
 - Running Cal Grant fund balance
- Produced Weekly
- Divided into two sections:
 - Accounting Summary
 - Payment Transaction Summary
- Good practice – Work this report monthly

Monthly Payment Activity Report

1 SABRMPA1 - 01

PHONE: 661-664-3228
 CALIFORNIA STUDENT AID COMMISSION
 PAYMENT ACTIVITY REPORT
 ACCOUNTING SUMMARY
 ACADEMIC YEAR 2006
 00799300 - CSU BAKERSFIELD

PAGE NO: 1
 RUN DATE: 04/14/2006
 RUN TIME: 06:04:02

DATE	ACTIVITY	FUNDS DISBURSED TO INSTITUTION	PAYMENT TRANSACTIONS	BALANCE
----	-----	-----	-----	-----
08-07-06	FALL ADVANCE	1,320,734.00		1,320,734.00
09-29-06	FALL RECONCILED PAYMENT TRANSACTIONS		1,062,570.00	258,164.00
10-13-06	FALL RECONCILED PAYMENT TRANSACTIONS		-840.00	259,004.00
10-27-06	FALL RECONCILED PAYMENT TRANSACTIONS		119,756.00	139,248.00
11-09-06	FALL RECONCILED PAYMENT TRANSACTIONS		34,985.00	104,263.00
12-01-06	FALL RECONCILED PAYMENT TRANSACTIONS		51,001.00	53,262.00
12-04-06	WINTER ADVANCE	1,227,625.00		1,280,887.00
12-15-06	FALL RECONCILED PAYMENT TRANSACTIONS		20,586.00	1,260,301.00
01-12-07	FALL RECONCILED PAYMENT TRANSACTIONS		7,431.00	1,252,870.00
01-26-07	FALL RECONCILED PAYMENT TRANSACTIONS		28,519.00	1,224,351.00
01-26-07	WINTER RECONCILED PAYMENT TRANSACTIONS		27,980.00	1,196,371.00
02-10-07	WINTER RECONCILED PAYMENT TRANSACTIONS		315,505.00	880,866.00
02-23-07	FALL RECONCILED PAYMENT TRANSACTIONS		67,610.00	813,256.00
02-23-07	WINTER RECONCILED PAYMENT TRANSACTIONS		401,109.00	412,147.00
03-06-07	SPRING ADVANCE	849,188.00		1,261,335.00
03-16-07	FALL RECONCILED PAYMENT TRANSACTIONS		8,643.00	1,252,692.00
03-16-07	WINTER RECONCILED PAYMENT TRANSACTIONS		581,078.00	671,614.00
03-30-07	FALL RECONCILED PAYMENT TRANSACTIONS		0.00	671,614.00
03-30-07	WINTER RECONCILED PAYMENT TRANSACTIONS		4,588.00	667,026.00
	TOTAL FUNDS DISBURSED / TOTAL PAYMENTS	3,397,547.00	2,730,521.00	



Unclaimed Awards Report

- Lists inactivated awards on your roster
- Most common reason is “Not in Attendance”
- Good practice – Work this report once each term after you have made all payments

Unclaimed Awards Report

ucar-2006-00799300-26jan07.txt
BATCH DATE: 01/26/2007

CALIFORNIA STUDENT AID COMMISSION
UNCLAIMED AWARDS FOR CSU BAKERSFIELD (00799300)
ACADEMIC YEAR 2006

PAGE: 1
RUN DATE: 01/27/2007
RUN TIME: 22:06:15

SSN	LAST NAME	FIRST NAME	M BIRTH I DATE	CYCLE ID	PROG CODE	NEW/ REN	CURRENT SCHOOL	LOA	ADDRESS
		ELIZABETH		E1	B	N	Y		
		MEI		C1	B	R	Y		
		YASIMEN		E1	B	N			
		DINA		E1	A	R	Y		
		LAURENCE		C1	B	R	Y		
		JESSICA		C1	B	N			
		KUNAL		E1	B	R	Y		
		JACE		E1	B	R	Y		
		DENISE		E1	B	R	Y		
		KYRSTEN		E1	A	R	Y		
		YOLANDA		E1	B	R	Y		
		LINDA		E1	B	N			
		RACHEL		E2	A	N	Y		
		DELORES			A	R	Y		
		JUAN		C1	B	R	Y		
		SANDRA		C1	B	R	Y		
		KEVIN		E1	B	R	Y		

Award Status Extract Process

- Do they have a Cal Grant?
- This process allows schools to query system on a batch basis.
- Step 1: Send us list of SSNs
- Step 2: We send school two lists – “Awarded” and “Not-awarded.”
- Step 3 Convert “Awarded” list to a “School Change Upload”

“Awarded” extract file

Field Name	Length	Sample Values	Position
Social Security Number	9	123456789	1-9
Last Name	19	Potter	10-28
First Name	12	Harry	29-40
Middle Initial	1	J	41-41
Date of Birth	8	20021125 YYYYMMDD	42-49
New or Renewal	1	N, R	50-50
Grant ID Number	9	C01077491	51-59
Education Level	1	2	60-60
Remaining Eligibility	6	325	61-66
Program Type	1	A, B, C	67-67
Total Award Amount	5	12345	68-72
Tuition & Fees	5	T/F	73-77
Tuition and Fee Award Amounts	5	12345	78-82
Books/Supplies	5	B/S	83-87
Books/Supplies Award Amount	5	12345	88-92
Access	5	ACSS	93-97
Access Award Amount	5	12345	98-102

CASH MANAGEMENT AND DISBURSEMENT



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Supplemental Payment Processing

- Compares the dollar amount of all the accepted transactions for a school to the dollar amount in the school's grant account
- Reconciled Payments
 - PAY STAT changes from “AP” (Accepted Payment) to “RP” (Reconciled Payment)
- Additional funds sent via EFT



Most Common Payment Codes

Codes: Quick Definition:

PD School verifies student is eligible for the term payment printed on the roster.

SC Adds a student to your roster and not reporting payment information.

NA Student is not in attendance; this code “hides” the student’s record on the roster and generates a letter to student.

YA Student is in attendance again after being on “NA” status; recalls the student to the eligible section of the roster.

Easy way to remember:

PD = Pay from roster Data

SC = School Change

NA = Not in Attendance

YA = Yes in Attendance



Most Common Adjustment Reason Codes

Codes:

HT, TT

AF

AH, AT

NP

NS

LA

Quick Definition:

Student is attending half-time or three quarter time and payment is adjusted accordingly

Student is attending full-time but is eligible for less than the maximum term award

Student is attending half-time or three quarter-time and is eligible for less than HT or TT adjusted amount

Student is not maintaining satisfactory academic progress (SAP)

School needs to adjust a previously reported payment to zero

Student is taking a Leave of Absence

Customized Rosters

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Online Roster

Be sure to save all entries before exiting the Roster or changes will be lost.

School ID = Acad Year = 2010 - 2011 Format = CSAC Standard Roster Search = SSN [GO!](#)

CSAC Standard Roster

Cal C

Confirmed

Customized Roster

E1

E2

Fall New

New C1 Not EL Verif

New C2

Nonconfirmed

unpaid



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1/27/2010 2:42:52 PM

Customized Roster and Reconciliation Roster

Roster/Reconciliation Main

Roster

- ▶ [Customize Roster](#)
- ▶ [Display Roster](#)
- ▶ [Print Roster](#)



Reconciliation

- ▶ [Customize Reconciliation](#)
- ▶ [Display Reconciliation](#)

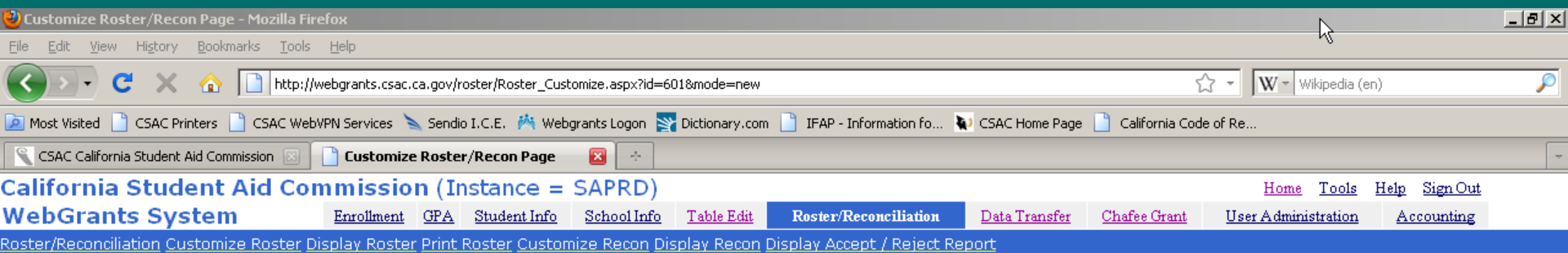


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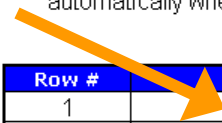
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Select CSAC Standard Roster by Clicking on the Name



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	CSAC Standard Roster	<input checked="" type="radio"/>		
2	Cal C	<input type="radio"/>		<input type="checkbox"/>
3	Confirmed	<input type="radio"/>		<input type="checkbox"/>
4	Customized Roster	<input type="radio"/>		<input type="checkbox"/>
5	E1	<input type="radio"/>		<input type="checkbox"/>
6	E1 New	<input type="radio"/>		<input type="checkbox"/>
7	E1 New Special	<input type="radio"/>		<input type="checkbox"/>
8	Fall New	<input type="radio"/>		<input type="checkbox"/>
9	New C1 Not EL Verif	<input type="radio"/>		<input type="checkbox"/>
10	New C2	<input type="radio"/>		<input type="checkbox"/>
11	Nonconfirmed	<input type="radio"/>		<input type="checkbox"/>
12	unpaid	<input type="radio"/>		<input type="checkbox"/>

- Change the name of the roster format
- Set this new roster as Preferred “No”

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Add / Edit Your Roster Format

- Select and manage the content of your roster.
- Click on **Save Roster Format** to complete the changes.
- If you save a format that exceeds your maximum number of allowed formats, your customized selections will be lost.
- **Do NOT use special characters such as apostrophes, hyphens or slashes in the Roster Format Title. Only letters and numbers should be used.**

Total custom formats defined:3
(You can have a maximum of 8 custom formats)

Roster Format Title	
Roster Format	Eligible Section Preferred <input type="radio"/> Yes <input checked="" type="radio"/> No



• Scroll Down to “Select Terms” and Mark One Term

- Press [Continue]

UI elements for data element selection:

- Buttons: Add Data Element(s), Remove Data Element(s)
- Dropdown menu (left):

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

- Buttons: 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

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

- This is how to sort by unpaid students...
- Scroll Down to “Define Sort Order Preferences”
- First Sort Preference is Roster Section/Ascending
- Second Sort Preference is D-Pay/Descending

Fall Winter Spring Summer

Define Sort Order Preferences

▶ Click drop down boxes to choose elements for sort.

First Sort Preference	Roster Section ▼	Ascending ▼
Second Sort Preference	D-Pay Code ▼	Descending ▼
Third Sort Preference	▼	Ascending ▼
Fourth Sort Preference	▼	Ascending ▼
Fifth Sort Preference	▼	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.)



Select and deselect boxes to customize 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.)

Cycle ID	<input type="checkbox"/> E1	<input type="checkbox"/> E2	<input type="checkbox"/> C1	<input checked="" type="checkbox"/> C2
Award Type	<input type="checkbox"/> Tuition/Fees	<input type="checkbox"/> Access	<input type="checkbox"/> Books & Supplies	
Housing Code	<input type="checkbox"/> On Campus (1)	<input type="checkbox"/> Off Campus (2)	<input type="checkbox"/> With Parents (3)	
Dependency Status	<input type="checkbox"/> Dependent	<input type="checkbox"/> Independent		
EL (Education Level)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4 <input type="checkbox"/> 5+
EL Status	<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)	
New/Renewal Students	<input type="checkbox"/> New	<input type="checkbox"/> Renewal		
Program Code	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> T
Section	<input checked="" type="checkbox"/> Eligible	<input type="checkbox"/> CC Reserve	<input type="checkbox"/> Ineligible	<input type="checkbox"/> Not In Attendance
Extra Eligibility	<input type="checkbox"/> TCP	<input type="checkbox"/> 5th Year	<input type="checkbox"/> Not TCP nor 5th Year	
E1 On Hold Status	<input type="checkbox"/> Verification Required		<input type="checkbox"/> Verification Completed	
	<input type="checkbox"/> Verification Not Required			
E2 On Hold Status	<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	
Top 2% Cal B Entitlement Awards	<input type="checkbox"/> Yes		<input type="checkbox"/> No	
Adj Reason Codes	<input type="checkbox"/> AF	<input type="checkbox"/> AH	<input type="checkbox"/> AT	<input type="checkbox"/> FT <input type="checkbox"/> GR
	<input type="checkbox"/> HT	<input type="checkbox"/> IA	<input type="checkbox"/> IB	<input type="checkbox"/> IC <input type="checkbox"/> IP
	<input type="checkbox"/> LA	<input type="checkbox"/> LD	<input type="checkbox"/> NP	<input type="checkbox"/> NS <input type="checkbox"/> OF



Select

Save Roster Format

Add / Edit Your Roster Format

- Select and manage the content of your roster.
- Click on **Save Roster Format** to complete the changes.
- If you save a format that exceeds your maximum number of allowed formats, your customized selections will be lost.
- Do NOT use special characters such as apostrophes, hyphens or slashes in the Roster Format Title. Only letters and numbers should be used.**

Save Roster Format

Total custom formats defined: 11

Roster Format Title

Roster Format

Cal C

Preferred Yes No

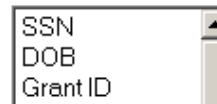
Select Data Elements and Column Order

- "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



Data Elements Selected



- Go to Display Roster,
- Select Your New Format and Press [GO]

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WebGrants System [Enrollment](#) [GPA](#) [Student Info](#) [School Info](#) **Roster/Reconciliation** [Data Transfer](#) [Chafee Grant](#)

[Roster/Recon Main](#) [Customize Roster](#) [Display Roster](#) [Print Roster](#) [Customize Recon](#) [Display Recon](#)

Online Roster

★ Be sure to save all entries before exiting the Roster or changes will be lost.

School ID = Acad Year = Format = Search =

- CSAC Standard Roster
- Renewals
- Unpaid First
- Limited Elig
- C1

- Students who meet the criteria you selected will appear on this roster

AMRA		CSAC ID:				View History							Record: 2
SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Renewal	EL Code	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section	
			E1	3	D	N	1	10955	0	400.00%	100.00%	ELIGIBLE(1)	
Custom Codes		1	2	3	4	5							
Education Level (EL) Verification			Reported EL 1		Verified EL		Status 1 -- Verification Not Required						
Fall Term		Adj Reason Codes				Pay Status Codes				Delete Txn			
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type				
	Totals	\$1,551	\$776				10955						
B	ACSS	\$1,551	\$776						GRT				

, JAMES		CSAC ID:				View History							Record: 3
SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Renewal	EL Code	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section	
				1	D	R	3	*****	*****	166.68%	100.00%	ELIGIBLE(1)	
Custom Codes		1	2	3	4	5							
Fall Term		Adj Reason Codes				Pay Status Codes				Delete Txn			
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type				
	Totals	\$2,520	\$1,260										
A	T/F	\$2,520	\$1,260						GRT				

, HENRY		CSAC ID:				View History							Record: 4
SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Renewal	EL Code	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section	
			E1	1	D	R	2	*****	*****	300.00%	100.00%	ELIGIBLE(1)	
Custom Codes		1	2	3	4	5							
Fall Term		Adj Reason Codes				Pay Status Codes				Delete Txn			
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type				
	Totals	\$2,520	\$1,260										
A	T/F	\$2,520	\$1,260						GRT				

- You may also print out a roster using this customized roster format by going to print roster and selecting your new format

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WebGrants System [Enrollment](#) [GPA](#) [Student Info](#) [School Info](#) **Roster/Reconciliation** [Data Transfer](#) [Chafee Grant](#)


[Roster/Recon Main](#) [Customize Roster](#) [Display Roster](#) [Print Roster](#) [Customize Recon](#) [Display Recon](#)

Print Roster

- Select the academic year and roster format to be printed.
- For CSAC Standard Roster, select HTML format or Text Format.
- HTML format may be slow to load, and in some cases data will not populate; if this occurs, use Text format.
- Set the layout to Landscape before printing.
- To view Text format reports, select the Display/Download link.
- To download, right click on the Display/Download link and choose the "Save" option.

School ID = Acad Year = Roster Format = Report Type

CSAC Standard Roster
Renewals
Unpaid First
Limited Elig
C1

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Reconciliation Tools

- Students on Leave
- Withdrawn Students
- Customized report filtering and sorting
 - Education Level
 - Pay Stat Code
 - Award Type
 - New/Renewal
 - Many more...

You only have Read Access on this screen. No updates allowed.

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.

Display Type: Detail Report Summary Report Detail Data

School ID = Acad Year = 2006-2007 Format = Special 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

Microsoft Internet Explorer p...
File Edit View Favorites Tools Help
Back Forward Stop Home Search Favorites Media Links CSAC PRINTERS CSAC Intranet
Address https://webgrants.csac.ca.gov/Roster/Recon_Display.asp?mode=displayreport&id=606

California Student Aid Commission (Instance = saprd) Home Tools Help Sign
WebGrants System Enrollment GPA Student Info School Info Roster/Reconciliation Data Transfer Chafee Grant
Roster/Recon Main Customize Roster Display Roster Print Roster Customize Recon Display Recon

You only have Read Access on this screen. No updates allowed.

- ▶ 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](#)



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Internet

Basic Report Filter. Term | Program Code | Award type |

Microsoft Internet Explorer p...
 File Edit View Favorites Tools Help
 Back Forward Stop Home Search Favorites Media Print Links CSAC PRINTERS CSAC Intranet
 Address https://webgrants.csac.ca.gov/Roster/Recon_Display.asp?mode=displayreport&id=606

- You only h**
- To view, select
 - To download,
 - If you are using "Save" option



Save As

Save in: Desktop

- My Computer
- My Network Places

History
 Desktop
 My Computer
 My Network P...

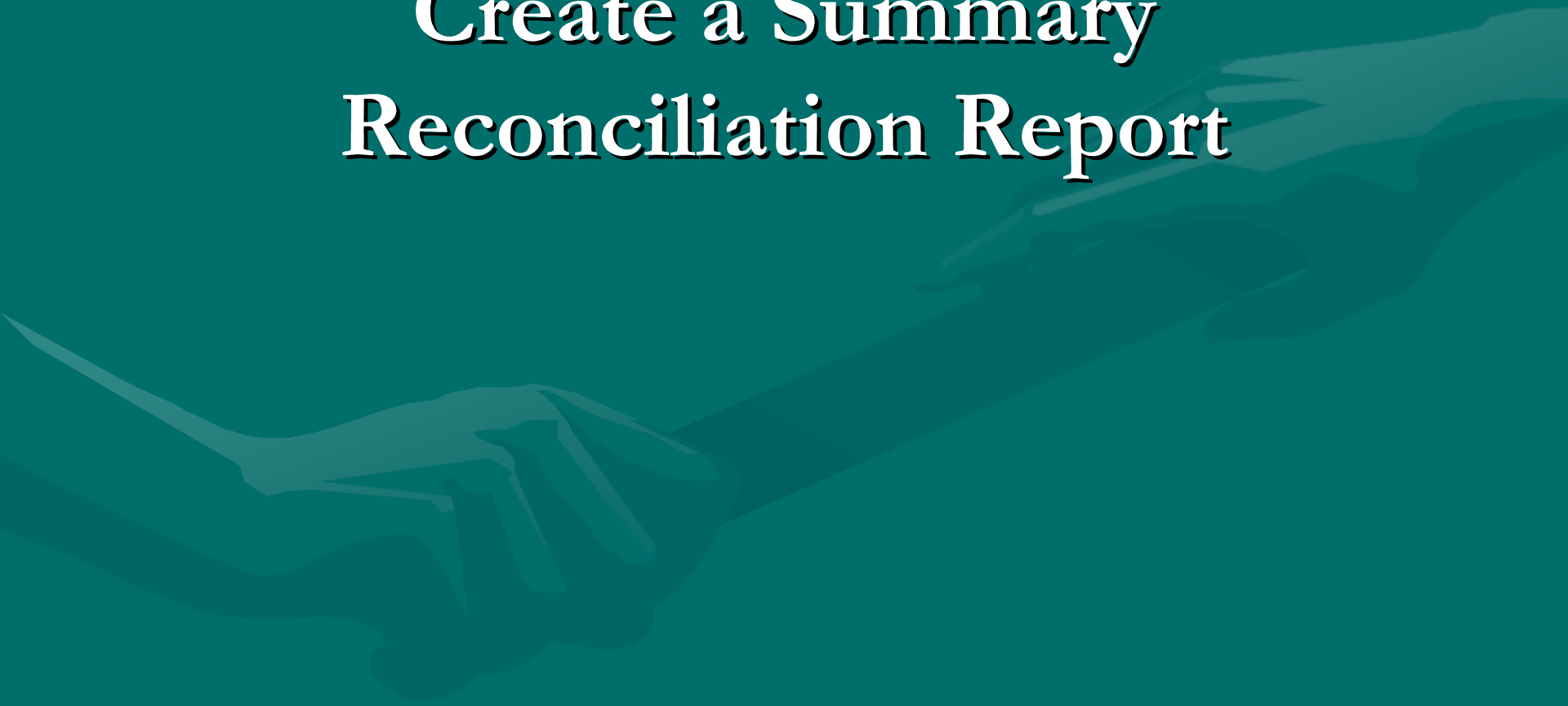
File name: x0DEzMTly0TEyMjAwNjE00DU1_reconfile.txt
 Save as type: Text Document

Save Cancel

QUESTIONS?



Create a Summary Reconciliation Report



FAM

Financial

CSAC

SCO



Create a Summary Reconciliation Report

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.

Display Type: Detail Report Summary Report Detail Data

Acad Year = 2007-2008

Format = CSAC Standard Reconciliation

GO!

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 GO!

FILTER CRITERIA : PAY STAT CODE IN ('RA','RP','AA','AP') AND TERM (FL,WN,SP,SU)
INFORMATION FOR TERMS NOT SELECTED WILL DISPLAY AS BLANKS


	FALL	WINTER	SPRING	SUMMER	TOTAL
A T/F					0.00
B T/F					0.00
B ACC	61,859.00		51,698.00		113,557.00
B TOTAL	61,859.00	0.00	51,698.00	0.00	113,557.00
C T/F					0.00
C B/S	5,256.00		5,256.00		10,512.00
C TOTAL	5,256.00	0.00	5,256.00	0.00	10,512.00

TOTAL	67,115.00	0.00	56,954.00	0.00	
GRAND TOTAL					124,069.00

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 

FILTER CRITERIA : PAY STAT CODE IN ('RA','RP','AA','AP') AND TERM (FL,WN,SP,SU)
INFORMATION FOR TERMS NOT SELECTED WILL DISPLAY AS BLANKS

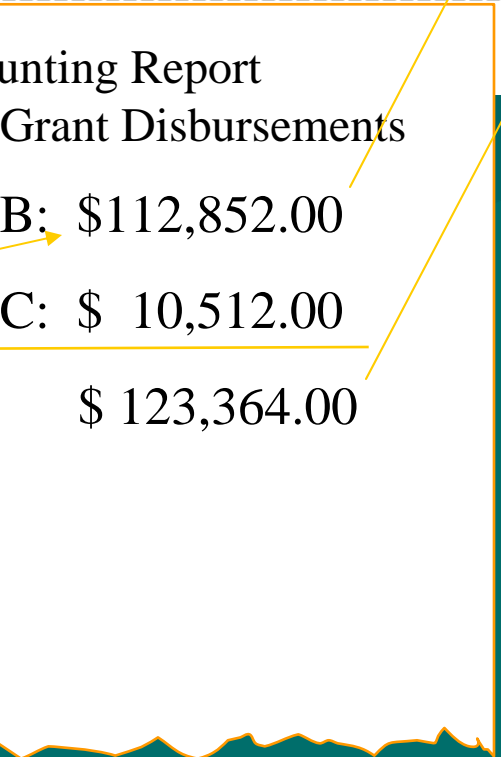
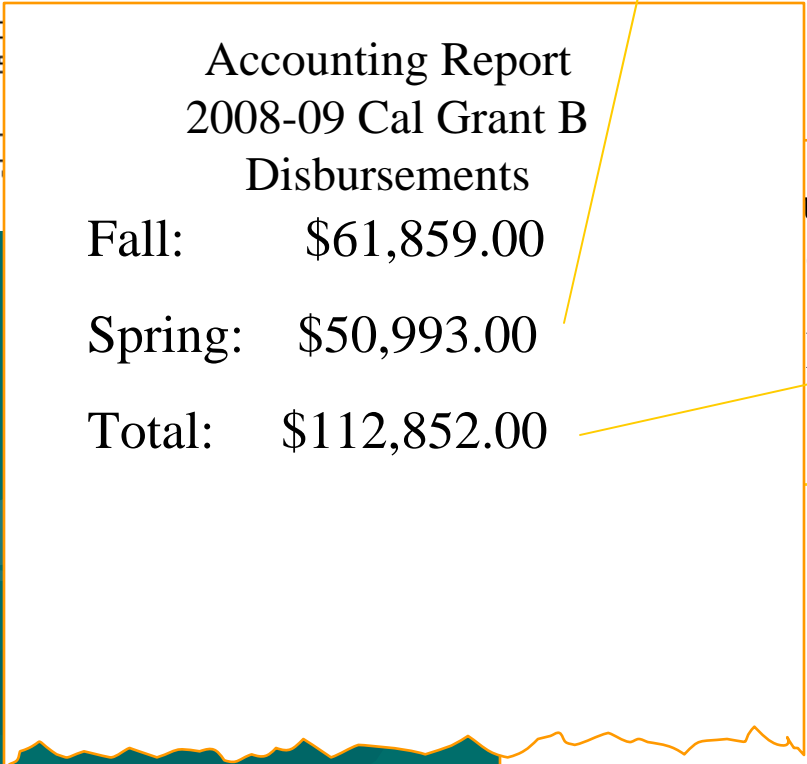
	FALL	WINTER	SPRING	SUMMER	TOTAL
A T/F					0.00
B T/F					0.00
B ACC	61,859.00		51,698.00		113,557.00
B TOTAL	61,859.00	0.00	51,698.00	0.00	113,557.00
C T/F					0.00
C B/S	5,256.00				10,512.00
C TOTAL				0.00	10,512.00
<hr/>					
TOTAL	67,115.00				
GRAND TOTAL					124,069.00

**Accounting Report
2008-09 Cal Grant B
Disbursements**

Fall: \$61,859.00
Spring: \$50,993.00
Total: \$112,852.00

**Accounting Report
Grant Disbursements**
B: \$112,852.00
C: \$ 10,512.00

\$ 123,364.00



Create a Detailed Report

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.

Display Type: Detail Report Summary Report Detail Data

Acad Year =

Format =



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 Report (Detail)

ACADEMIC YEAR 2008-09

RECONCILIATION REPORT (DETAIL)
00113700 - CSU FULLERTON

PAGE NUMBER: 1

FILTER CRITERIA : PAY STAT CODE IN ('RA','RP','AA','AP') AND TERM (FL,WN,SP,SU)
SORT CRITERIA : SSN ASCENDING , TERM ASCENDING , AWARD TYPE DESCENDING
DATES SHOWN IN THIS REPORT ARE IN MMDDYY FORMAT

SSN	SCH PRG	GRANT ID	PG CD	TM	AWD TYP	ADJ	AMT	DISB	AMT	ELIG USED	ADJ RSN	LAST NAME	FIRST NAME (10 Char)	M I	CREATE DATE	PAY DATE	PS	ADJ DATE	N	CI	EL
	00		B	SP	ACS		581	581	581	37.5	TT		SALMAMAE		020702	050202	RA	050202	N	C1	4
							581	581	581												
	00		B	SP	ACS		581	581	581	37.5	TT		MAIJ		051602	053002	RA	051602	N	C2	2
							581	581	581												
	00		B	SP	ACS		387	387	387	25.0	HT		SAM		052302	053002	RA	052302	N	C2	3
							387	387	387												
	00		B	SP	ACS		0	775	775	50.0			LAURIE		041102	050202	RP		N	C2	2
							0	775	775												
	00		B	SP	ACS		0	775	775	50.0			MEG		030702	032802	RP		R		4
							0	775	775												
	00		B	SP	ACS		0	775	775	50.0			TERRINE		041102	050202	RP		N	C2	2
							0	775	775												
	00		B	SP	ACS		0	775	775	50.0			BALONSO		041802	050202	RP		N	C1	4
							0	775	775												
	00		B	SP	ACS		775	775	775	50.0	FT		LETTERMAN		031402	032802	RA	031402	N	C2	2
							775	775	775												
	00		B	SP	ACS		581	581	581	37.5	TT		MARINANNA		020702	032802	RA	030702	N	C1	3

Reconciliation Report (Detail)

ACADEMIC YEAR 2008-09

RECONCILIATION REPORT (DETAIL)
00113700 - CSU FULLERTON

PAGE NUMBER: 1

FILTER CRITERIA : PAY STAT CODE IN ('RA','RP','AA','AP') AND TERM (FL,WN,SP,SU)
SORT CRITERIA : SSN ASCENDING , TERM ASCENDING , AWARD TYPE DESCENDING
DATES SHOWN IN THIS REPORT ARE IN MMDDYY FORMAT

SSN	SCH PRG	GRANT ID	PG CD	TM	AWD TYP	ADJ AMT	DISB AMT	ELIG USED	ADJ RSN	LAST NAME	FIRST (10 C)
00			B	SP	ACS	581	581	37.5	TT		SALMA
						581	581				
00			B	SP	ACS	581	581	37.5	TT		MAIJ
						581	581				
00			B	SP	ACS	387	387	25.0	HT		SAM
						387	387				
00			B	SP	ACS	0	775	50.0			LAURJ
						0	775				
00			B	SP	ACS	0	775	50.0			MEG
						0	775				
00			B	SP	ACS	0	775	50.0			FERRJ
						0	775				
00			B	SP	ACS	0	775	50.0			BALON
						0	775				
00			B	SP	ACS	775	775	50.0	FT		LETTE
						775	775				
00			B	SP	ACS	581	581	37.5	TT		MARIN

Accounting Report 2007-08 Cal Grant B Spring Disbursements

Scontreras, S \$581

Uyen, M \$581

Smain, S \$387

Millen, L \$775

Snied, M \$775

Souza, T \$775

Squezada, B \$775

Juguilar, M \$581

Common Reporting Errors

- Reporting a transaction for a student who is not in attendance at your school
- Reporting a transaction or making a school change for a student when the record is set on the wrong award year
 - Users must make sure the correct academic year is selected when using any WebGrants

♦ Be sure to save all entries before exiting the Roster or changes will be lost.

School ID = 00114400 Acad Year = 2007-2008 Form = CSAC Standard Roster Search = SSN GO

- Not reporting correct unmet need for renewal students
 - Always calculate need based on the academic year; not the term



Best Practice Tips

- Do **NOT** send refund checks to CSAC when you find a student ineligible and the award year is still open.
 - Make the adjustment on WebGrants using proper adjustment codes, like the NS code
 - If you have trouble making adjustments, please contact School Support Line
 - Sending a refund check early creates confusion and may throw off your school's Cal Grant balance
 - With some schools' accounts, sending individual refund checks may incur an extra cost



Best Practice Tips Continued....

- CSAC accounting may have to send a refund check back to the school which incurs a cost
- When sending Cal Grant refunds after the award year is closed, please attach proper documentation so that the funds can be properly applied
- Please train new staff so that Cal Grant program is operated in a consistent manner at the school
- Please contact Cal Grant Operations or School Support Services for any issue.

QUESTIONS?

