

2016-2017 California Middle Class Scholarship (MCS) Web Application

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



**PAYMENT
AND
CORRECTIONS
GUIDE**

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REVISION HISTORY

Date	Version #	Document Change
11/04/2016	.01	Draft version created
11/22/2016	.02	Draft version reviewed and updated
12/09/2016	.03	Draft Final
12/28/2016	.04	Final Version

INTRODUCTION

This user guide contains all essential information for the readers to understand the *MCS Payment-Correction Process* for the 2016-2017 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.

New for 2016-2017:

The following changes were made to the Middle Class Scholarship program based on legislation mandated for academic year 2016-2017, per Education Code, Section 70022.5:

(a) A scholarship award under this article may be renewed for a total of the equivalent of four years of full-time attendance in an undergraduate program. Commencing with the 2016–17 academic year, the total number of years of eligibility for grants pursuant to this article shall be based on the student's educational level in his or her course of study as designated by the institution of attendance when the recipient initially receives payment for a grant.

(b) For a student enrolled in an institutionally prescribed five-year undergraduate program, a scholarship award under this article may be renewed for a total of up to five academic years of attendance as long as the student meets the requirements of Section 70022.

(c) A recipient of a scholarship award under this article who has completed a baccalaureate degree, and who has been admitted to and is enrolled in a program of professional teacher preparation at an institution approved by the Commission on Teacher Credentialing, is eligible for, but not entitled to, renewal of the scholarship award for an additional academic year of full-time attendance as long as the student meets the requirements of Section 70022.

Eligibility Cap Rules Established:

1. The "Year Established" is the academic year in which the student was first disbursed an MCS payment. *NOTE: MCS disbursements made prior to the 2016-17 AY are not taken into consideration when determining the "Year Established" since an eligibility cap did not exist prior to the 2016-17 academic year.)*
2. The Education Level (EL) reported by the campuses in the Enrollment file will be used to establish the student's total MCS eligibility.
3. CSAC will only allow an EL change during the student's initial MCS year (effective from the 2016-17 academic year forward).
4. Effective with the 2015-16 academic year, the MCS "year-end / reconciliation" deadline will now occur in September of each processing year. It will not be associated with the end of a calendar year.

5. Commencing with the 2016-17 AY, if a student begins an academic year with less than 10.00% remaining MCS eligibility, then that student will not be granted an MCS award due to insufficient eligibility.
6. Term eligibility will be used as follows for payments that are applied greater than \$0:
 - Full time at a semester school = 50.00%
 - Half time at a semester school = 25.00%
 - Full time at a quarter school = 33.33%
 - Half time at a quarter school = 16.67%

 - A Refund/Adjusted Payment transaction will use full eligibility if the payment applied is greater than \$0:
 - Full time at a semester school = 50.00%
 - Full time at a quarter school = 33.33%

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 9.0 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 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 screen). 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 fields below offer guidance on the relevant data to provide and 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:

- \$156,000 or less

Field 12, Student's Federal Aid:

- Pell Grant
- Federal Supplemental Educational Opportunity Grant (FSEOG)
- Teach Grant
- Bureau Indian Affairs Grants (BIA)

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.)
- Education Opportunity Programs (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
- Law Enforcement Personnel Dependents Grant Program (LEPD)
- California National Guard Education Assistance Award Program (CNG EAAP)

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.

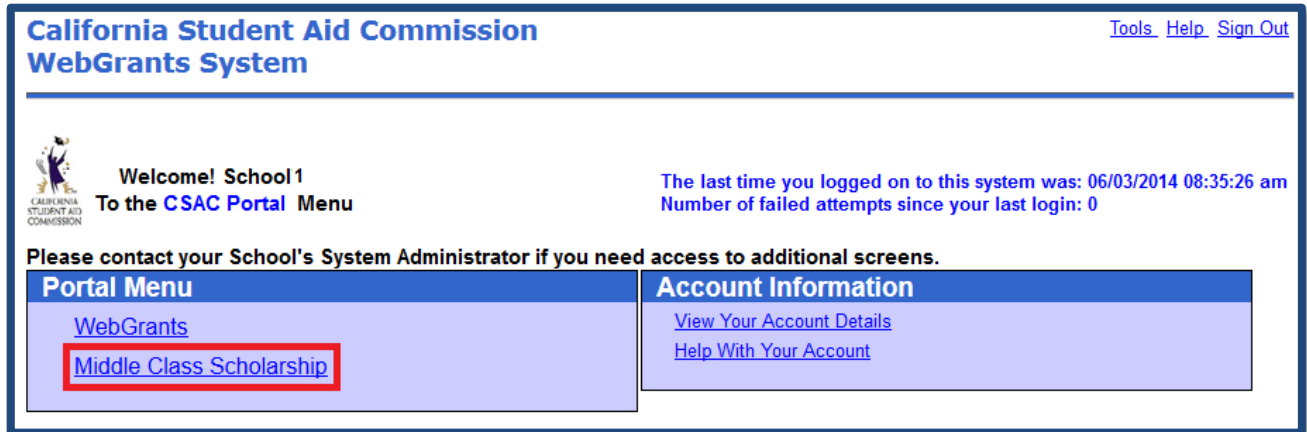


The screenshot shows the login page for the WebGrants System. At the top, there is a navigation bar with links for CSAC, Cal Grants, Cash for College, Cal Dream Act, and FAFSA. The main header features the CA.GOV logo and the California Student Aid Commission logo. Below the header, there is a welcome message and a link for 'Help With Your Account'. The login section is divided into two main areas: 'Please sign in' and 'Need to create an account?'. The 'Please sign in' area includes a form with fields for 'User Name' and 'Password', and a 'Sign-in' button. The 'Need to create an account?' area provides instructions for school administrators, users, browser versions, and Apple/Mac computers. A legal disclaimer is located at the bottom of the page, and a footer contains various utility links.

WebGrants System – Login Screen

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

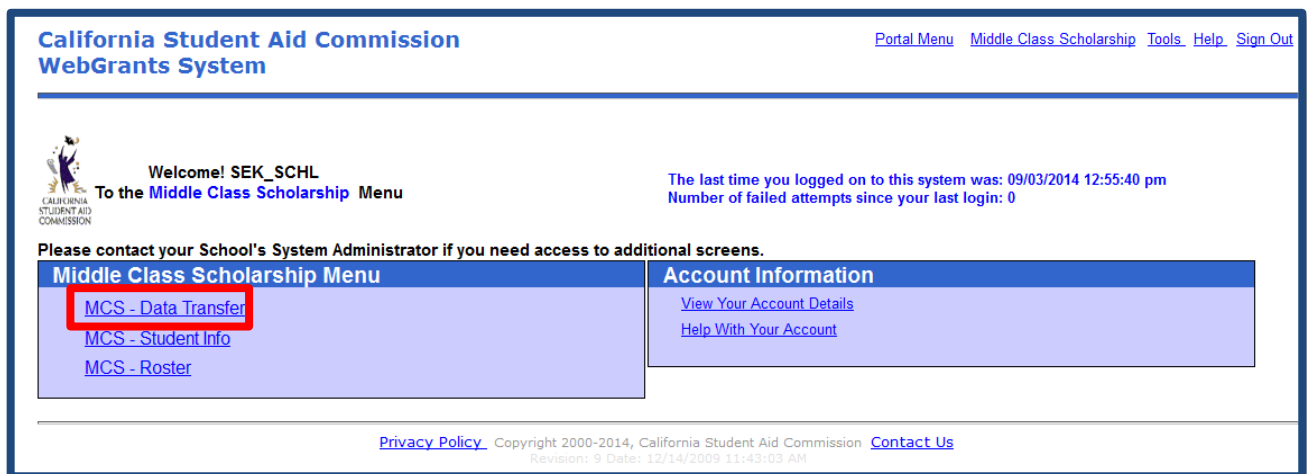
- WebGrants
- Middle Class Scholarship**

Account Information

- [View Your Account Details](#)
- [Help With Your Account](#)

WebGrants System – CSAC Portal Menu

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



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

- MCS - Data Transfer**
- MCS - Student Info
- MCS - Roster

Account Information

- [View Your Account Details](#)
- [Help With Your Account](#)

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

WebGrants System – Middle Class Scholarship Menu

- Select the “MCS – Data Transfer” option.
- The system will display the *MCS – Data Transfer Menu* screen.



MCS - Data Transfer File Upload Report Download

MCS - Data Transfer Menu

- File Upload**
- Report Download

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MCS 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.

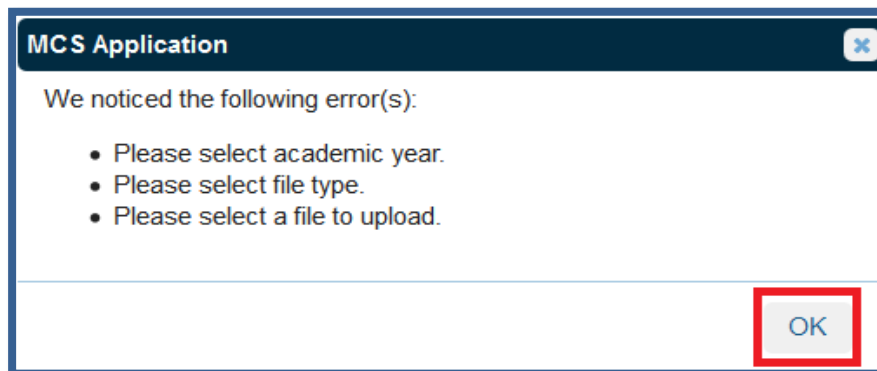
School ID
Acad Year
File Type

Select File No file selected.

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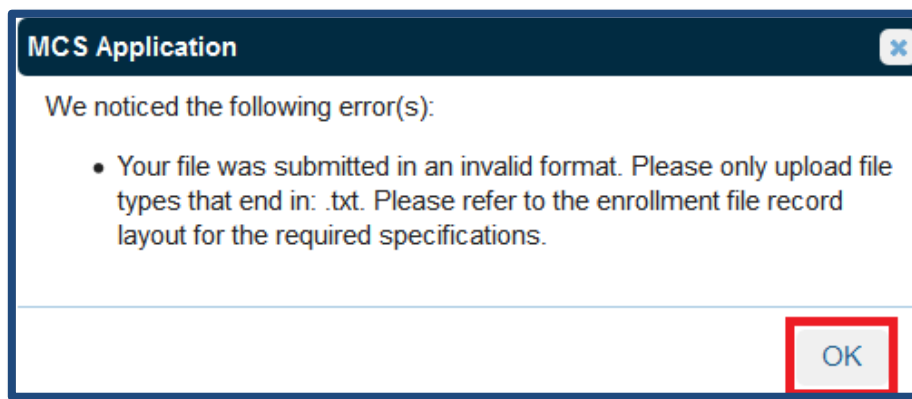
MCS Data Transfer Menu – File Upload Screen

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



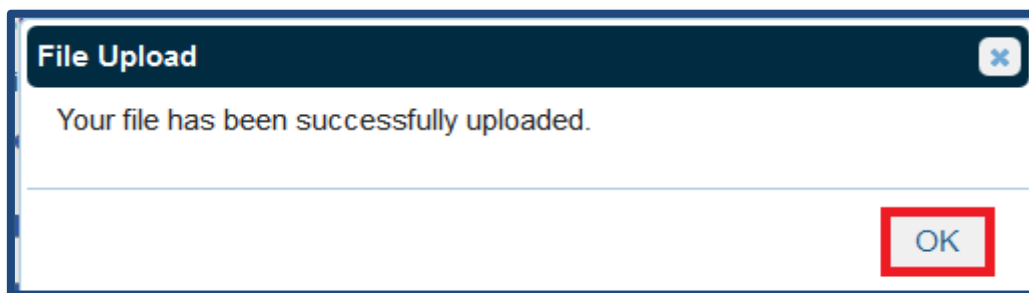
14. Select the **OK** button.
15. The system will display the **MCS File Upload** screen.
16. Select the **Academic Year**, **File Type** and **File** to upload.
17. If the file type does not comply with file format requirements, the system will display an exception message.

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 File Upload Screen – 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 File Upload Screen – 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
Acad Year
File Type

Select File No file selected.

File Upload Status

File Name:	MCSP-2016-00131200-PYMTTESTFILE.TXT
File Size:	2.13 KB
Academic Year:	2016 - 2017
File Header:	OK
File Footer:	OK
Total Records:	6
Valid Records:	6
Invalid Records:	0

MCS File Upload Screen – Successful 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.

MCS File Upload Screen – 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
Acad Year
File Type

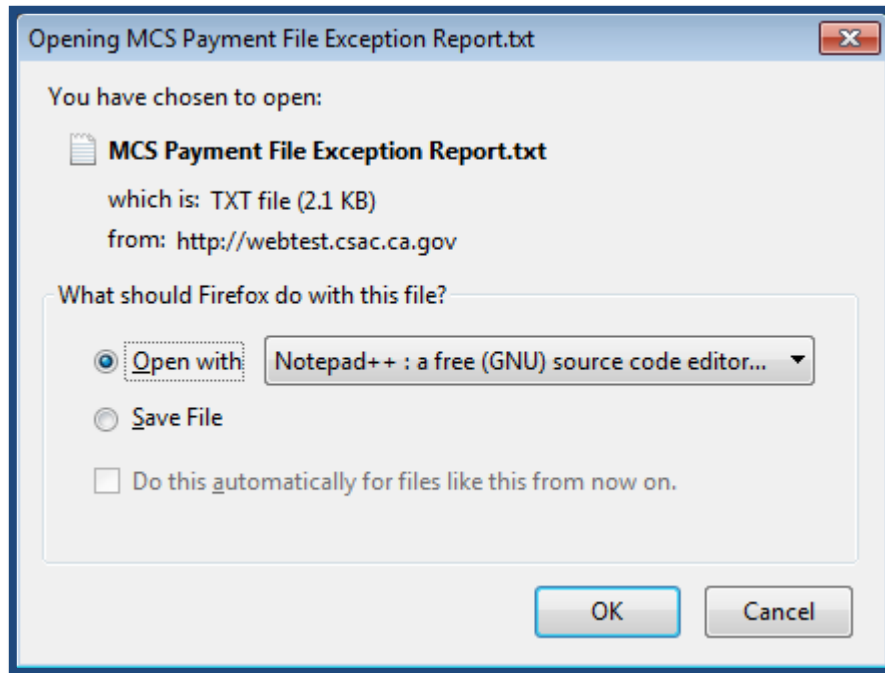
Select File No file selected.

File Upload Status

File Name:	MCSP-2016-00131200-PymtFile.TXT
File Size:	2.12 KB
Academic Year:	2016 - 2017
File Header:	Error
File Footer:	Error
Total Records:	6
Valid Records:	5
Invalid Records:	1

MCS File Upload Screen – File Upload Invalid Status

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



MCS Invalid File Upload – Exception 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.

CALIFORNIA STUDENT AID COMMISSION						11/14/2016 1:40:24 PM
MCS Payment File Format Exception Report						
UNIV OF CA - BERKELEY						

File Header/Footer error:						
MCSP09	00131200SUNIV OF CA - BERKELEY	201611142016				
Incorrect length of file header						
MCFT09	00131200SUNIV OF CA - BERKELEY	201611142016000000000006				
Incorrect length of file footer						

Transaction line error:						
00131212016111111111111111111111SADDLE	LEVI	J19960826021	3	00000		
Line length error.						

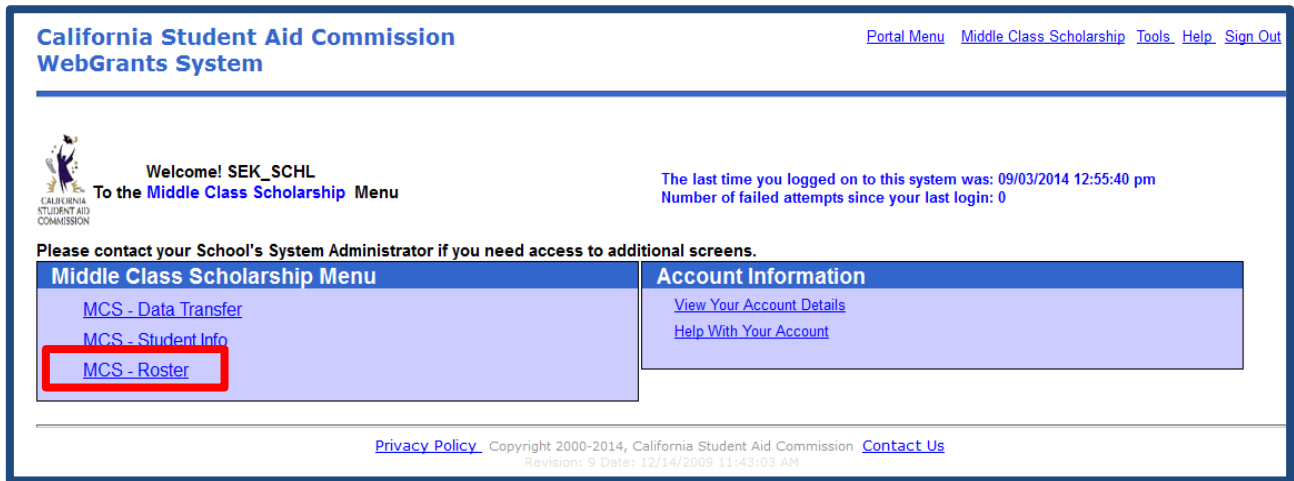
MCS Invalid File Upload – Exception Report

2.4 USING THE ONLINE PAYMENT ROSTER:

1. Navigate to the [WebGrants System](#) login page.

✚ For detailed log-in instructions, refer back to Sections 2.1 and 2.3

2. Select the [Middle Class Scholarship](#) menu then 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

- MCS - Data Transfer
- MCS - Student Info
- MCS - Roster**

Account Information

- [View Your Account Details](#)
- [Help With Your Account](#)

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WebGrants System – Middle Class Scholarship Menu

3. The system will display the [MCS – Roster Menu](#) screen.

4. Select [MCS Display Roster](#).



California Student Aid Commission
WebGrants System

Portal Menu Middle Class Scholarship Tools Help Sign Out

MCS - Data Transfer MCS - Student Info MCS - Roster

MCS - Roster MCS Display Roster

MCS - Roster Menu

- MCS Display Roster**

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MCS Roster Menu – MCS Display Roster Menu

5. The system will display the *Middle Class Scholarship – School Roster* screen.
6. 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.

Middle Class Scholarship - School Roster

- Enter the School ID for Search.
- Enter the SSN/CSAC ID or First Name or Last Name to refine the Search results.
- Partial first name with minimum 3 characters.
- Partial last name with minimum 2 characters.

School ID

Acad Year

Search ID

First Name

Last Name

Recertify Only

MCS School Roster Screen (main search screen)

7. Click the *Search* button.
8. The system will generate a list of the search results. Click on a row to access the student's roster information.

School ID

Acad Year

Search ID

First Name

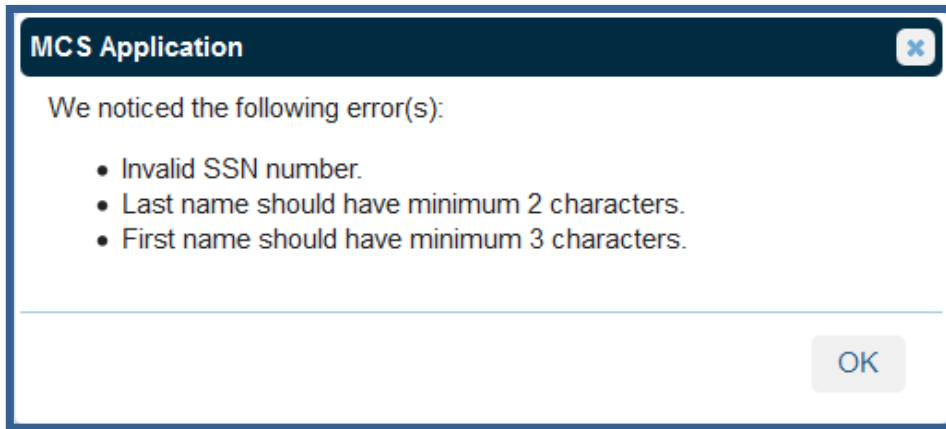
Last Name

Recertify Only

SSN	CSAC ID	Last Name	First Name	DOB
████████	████████	████████████████	████████████████	████████
████████	████████	████████████████	████████████████	████████
████████	████████	████████████████	████████████████	████████
████████	████████	████████████████	████████████████	████████

MCS School Roster Screen – Student Roster List

9. 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 School Roster Screen - Missing Search Criteria Error Screen

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

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

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

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

Demographic Information				Annual Data		
CSAC ID:	[REDACTED]			Open Terms:	Fall, Winter, Spring	
SSN No:	XXX - XX - 4267			Total Income:	\$75,223	<input type="text"/>
DOB:	[REDACTED]			Federal Aid:	\$0	<input type="text"/>
Cal Grant Award:	\$0	Total Elig-%:	400.00	Institutional Aid:	\$0	<input type="text"/>
Annual Tuition/Fees:	\$5,472	Used Elig-%:	0.00	State Aid:	\$0	<input type="text"/>
Annual Award:	\$1,644	Remain Elig-%:	400.00	ISIR Tran #:	02	<input type="text"/>
Asset Amount:	\$143,000	Year Entered:	2016	Eligibility Change:	<input type="text" value="--- SELECT ---"/>	Payment History
TCP/5th Yr-Indicator:						
Education Level:	1st year, attended college before					

Transaction Type: Correction Payment

FALL TERM		SPRING TERM	
Enrollment Status:	<input type="text" value="--- SELECT ---"/>	Enrollment Status	<input type="text" value="--- SELECT ---"/>
Term Award Amount	<input type="text" value="\$822"/> [\$822]	Term Award Amount	<input type="text" value="\$822"/> [\$822]
Adj. Reason Code	<input type="text" value="--- SELECT ---"/>	Adj. Reason Code	<input type="text" value="--- SELECT ---"/>
Amount Paid/Verified	<input type="text"/>	Amount Paid/Verified	<input type="text"/>
Tuition/Fees	<input type="text"/> [\$2,736]	Tuition/Fees	<input type="text"/> [\$2,736]
Federal Aid	<input type="text"/> [\$0]	Federal Aid	<input type="text"/> [\$0]
Institutional Aid	<input type="text"/> [\$0]	Institutional Aid	<input type="text"/> [\$0]
State Aid	<input type="text"/> [\$0]	State Aid	<input type="text"/> [\$0]
Payment Status:	Not Reconciled	Payment Status:	Not Reconciled

MCS School Roster Menu – Online Payment Roster Screen

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

Demographic Information				Annual Data			
[Redacted]				Open Terms:	Fall, Winter, Spring		
CSAC ID:	[Redacted]			Total Income:	\$75,223	[Input Field]	
SSN No:	XXX - XX - 4267			Federal Aid:	\$0	[Input Field]	
DOB:	[Redacted]			Institutional Aid:	\$0	[Input Field]	
Cal Grant Award:	\$0	Total Elig-%:	400.00	State Aid:	\$0	[Input Field]	
Annual Tuition/Fees:	\$5,472	Used Elig-%:	0.00	ISIR Tran #:	02	[Input Field]	
Annual Award:	\$1,644	Remain Elig-%:	400.00	Eligibility Change:	[--- SELECT ---]	Payment History	
Asset Amount:	\$143,000	Year Entered:	2016				
TCP/5th Yr-Indicator:							
Education Level: 1st year, attended college before							

Transaction Type: Correction Payment

FALL TERM		SPRING TERM	
Enrollment Status:	[--- SELECT ---] [--- SELECT ---] FT - (Pay) Less Than HT - (Do Not Pay) Not Enrolled HT - (Pay)	Enrollment Status	[--- SELECT ---]
Term Award Amount [\$822]	[Input Field]	Term Award Amount [\$822]	[Input Field] \$822
Adj. Reason Code	[Input Field]	Adj. Reason Code	[--- SELECT ---]
Amount Paid/Verified	[Input Field]	Amount Paid/Verified	[Input Field]
Tuition/Fees [\$2,736]	[Input Field]	Tuition/Fees [\$2,736]	[Input Field]
Federal Aid [\$0]	[Input Field]	Federal Aid [\$0]	[Input Field]
Institutional Aid [\$0]	[Input Field]	Institutional Aid [\$0]	[Input Field]
State Aid [\$0]	[Input Field]	State Aid [\$0]	[Input Field]
Payment Status:	Not Reconciled	Payment Status:	Not Reconciled

MCS Online Payment Roster Screen

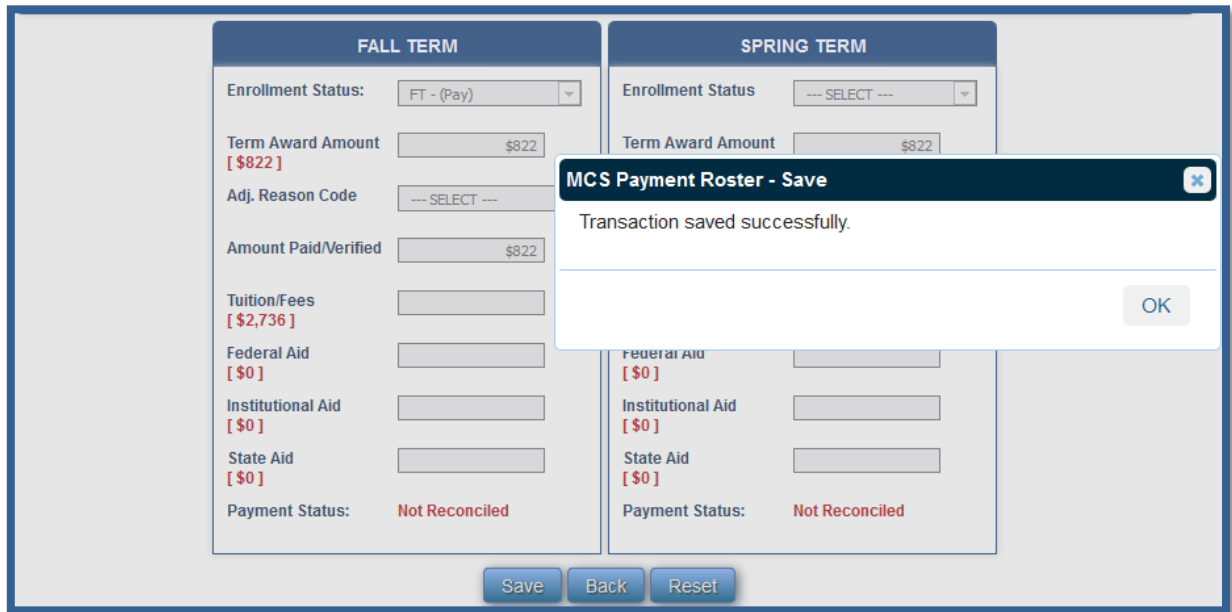
15. Once the student's **Enrollment Status** has been selected, the system will automatically populate the Amount Paid/Verified field under **Fall Term** with the payment amount.
16. If the **Enrollment Status** and payment amount is correct, click on the **Save** button to apply the payment(s).

Transaction Type: Correction Payment

FALL TERM	SPRING TERM
Enrollment Status: <input type="text" value="FT - (Pay)"/>	Enrollment Status <input type="text" value="--- SELECT ---"/>
Term Award Amount [\$822] <input type="text" value="\$822"/>	Term Award Amount [\$822] <input type="text" value="\$822"/>
Adj. Reason Code <input type="text" value="--- SELECT ---"/>	Adj. Reason Code <input type="text" value="--- SELECT ---"/>
Amount Paid/Verified <input type="text" value="\$ 822"/>	Amount Paid/Verified <input type="text"/>
Tuition/Fees [\$2,736] <input type="text"/>	Tuition/Fees [\$2,736] <input type="text"/>
Federal Aid [\$0] <input type="text"/>	Federal Aid [\$0] <input type="text"/>
Institutional Aid [\$0] <input type="text"/>	Institutional Aid [\$0] <input type="text"/>
State Aid [\$0] <input type="text"/>	State Aid [\$0] <input type="text"/>
Payment Status: Not Reconciled	Payment Status: Not Reconciled

MCS Online Payment Roster Screen – Term Level Section

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



The screenshot displays the MCS Payment Roster interface with two columns for 'FALL TERM' and 'SPRING TERM'. The 'FALL TERM' column shows an enrollment status of 'FT - (Pay)', a term award amount of '\$822', an adjusted reason code of '--- SELECT ---', and an amount paid/verified of '\$822'. Other fields include Tuition/Fees of '\$2,736', Federal Aid of '\$0', Institutional Aid of '\$0', and State Aid of '\$0'. The payment status is 'Not Reconciled'. The 'SPRING TERM' column has an enrollment status of '--- SELECT ---', a term award amount of '\$822', and other fields are empty. The payment status is also 'Not Reconciled'. A pop-up box titled 'MCS Payment Roster - Save' is overlaid on the interface, displaying the message 'Transaction saved successfully.' and an 'OK' button. At the bottom of the interface are 'Save', 'Back', and 'Reset' buttons.

DELETE BUTTON:

18. 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: [REDACTED]				Open Terms: Fall, Winter, Spring			
SSN No: XXX - XX - 4267				Total Income: \$75,223			
DOB: [REDACTED]				Federal Aid: \$0			
Cal Grant Award: \$0		Total Elig-%: 400.00		Institutional Aid: \$0			
Annual Tuition/Fees: \$5,472		Used Elig-%: 0.00		State Aid: \$0			
Annual Award: \$1,644		Remain Elig-%: 400.00		ISIR Tran #: 02			
Asset Amount: \$143,000		Year Entered: 2016		Eligibility Change: --- SELECT ---			
TCP/5th Yr-Indicator:				Payment History			
Education Level: 1st year, attended college before							

Transaction Type: Correction Payment

Delete

FALL TERM		SPRING TERM	
Enrollment Status:	FT - (Pay)	Enrollment Status:	--- SELECT ---
Term Award Amount	\$822	Term Award Amount	\$822
Adj. Reason Code	--- SELECT ---	Adj. Reason Code	--- SELECT ---
Amount Paid/Verified	\$822	Amount Paid/Verified	
Tuition/Fees	\$2,736	Tuition/Fees	
Federal Aid	\$0	Federal Aid	
Institutional Aid	\$0	Institutional Aid	
State Aid	\$0	State Aid	
Payment Status:	Not Reconciled	Payment Status:	Not Reconciled

Save Back Reset

19. 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

RESET BUTTON:

20. The system will return you to the *Middle Class Scholarship – School Roster* screen.
21. Selecting the "Reset" button will remove/clear out any data that you have entered, prior to saving the transaction.

Transaction Type: Correction Payment

FALL TERM	SPRING TERM
Enrollment Status: <input type="text" value="--- SELECT ---"/>	Enrollment Status <input type="text" value="--- SELECT ---"/>
Term Award Amount <input type="text" value="\$822"/> [\$822]	Term Award Amount <input type="text" value="\$822"/> [\$822]
Adj. Reason Code <input type="text" value="Eligibility"/>	Adj. Reason Code <input type="text" value="--- SELECT ---"/>
Amount Paid/Verified <input type="text" value="\$ 0"/>	Amount Paid/Verified <input type="text" value=""/>
Tuition/Fees <input type="text" value=""/> [\$2,736]	Tuition/Fees <input type="text" value=""/> [\$2,736]
Federal Aid <input type="text" value="\$ 125"/> [\$0]	Federal Aid <input type="text" value=""/> [\$0]
Institutional Aid <input type="text" value=""/> [\$0]	Institutional Aid <input type="text" value=""/> [\$0]
State Aid <input type="text" value=""/> [\$0]	State Aid <input type="text" value=""/> [\$0]
Payment Status: Not Reconciled	Payment Status: Not Reconciled

BACK BUTTON:

22. Selecting the “Back” button will return you to the list of students under the main MCS School Roster screen.

Transaction Type: Correction **Payment**

FALL TERM	SPRING TERM
Enrollment Status: <input type="text" value="--- SELECT ---"/>	Enrollment Status <input type="text" value="--- SELECT ---"/>
Term Award Amount <input type="text" value="\$822"/> [\$822]	Term Award Amount <input type="text" value="\$822"/> [\$822]
Adj. Reason Code <input type="text" value="Fees"/>	Adj. Reason Code <input type="text" value="--- SELECT ---"/>
Amount Paid/Verified <input type="text" value="\$ 0"/>	Amount Paid/Verified <input type="text" value=""/>
Tuition/Fees <input type="text" value="\$ 1,368"/> [\$2,736]	Tuition/Fees <input type="text" value=""/> [\$2,736]
Federal Aid <input type="text" value="\$ 0"/> [\$0]	Federal Aid <input type="text" value=""/> [\$0]
Institutional Aid <input type="text" value=""/> [\$0]	Institutional Aid <input type="text" value=""/> [\$0]
State Aid <input type="text" value=""/> [\$0]	State Aid <input type="text" value=""/> [\$0]
Payment Status: Not Reconciled	Payment Status: Not Reconciled

Middle Class Scholarship - School Roster

- Enter the School ID for Search.
- Enter the SSN/CSAC ID or First Name or Last Name to refine the Search results.
- Partial first name with minimum 3 characters.
- Partial last name with minimum 2 characters.

School ID <input type="text" value="00114700"/>	Acad Year <input type="text" value="2016 - 2017"/>	Search ID <input type="text" value="SSN"/>
First Name <input type="text"/>	Last Name <input type="text"/>	<input type="checkbox"/> Recertify Only <input type="button" value="Search"/>

SSN	CSAC ID	Last Name	First Name	DOB
██████████	██████████	██████████	██████████	██████████
██████████	██████████	██████████	██████████	██████████
██████████	██████████	██████████	██████████	██████████

MCS CORRECTION PROCESS GUIDELINES

3.1 INTRODUCTION:

The **MCS Correction** process is 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.

3.2 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, a campus will only be able to submit changes for the Fall term since the Winter and Spring terms are 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 select the “Payment” File Type. Within the file record layout, field 42 (Transaction Type), would be changed from a “P” – for Payment Information 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** within the same week. The system will only apply one or the other or possibly reject both transaction types.
- 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. Annual and Term level correction cannot be submitted for the same student record in the same file or else the transactions will be rejected.
 - 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, if any of the following fields are provided in the file, CSAC's system will assume 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.

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 during the award calculation.

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), this will result in the student being withdrawn from the campus roster. If 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 one of these values. 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 Teacher Credential Program/5th Year Program Flag), CSAC will recalculate the student's award amount at the annual level using the stored amounts designated for the program by segment type.

If the data value submitted is 9 (Remove TCP/5th Year Program), 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) this will result in the student being withdrawn from the campus roster. If 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 one of the values. 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 Teacher Credential Program/5th Year Program Flag or Remove TCP/5th Year Program) 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 campus 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, 2, 3, 4, 5 and 7. Value 6 is used by CSAC to alert the campus that the term's payment amount requires recertification. **Adjustment reason code 8 (Add TCP) is no longer available at the term level.**

If the school provides a value of **3 or 4 (Eligibility or Fees)**, then a value of “C” must also be submitted in field 42 (Transaction Type). 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)**, then a value of “P” must also be submitted in field 42 (Transaction Type). 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). This indicates that the student is not eligible for the term and should not be paid for the Fall/Winter/Spring term and 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.

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 Tuition/Fee amount for the term. When reporting changes to the term Tuition/Fee amounts, you must also indicate a “C” in field 42 to indicate the transaction type 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 type 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 type 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 type 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 during the 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.

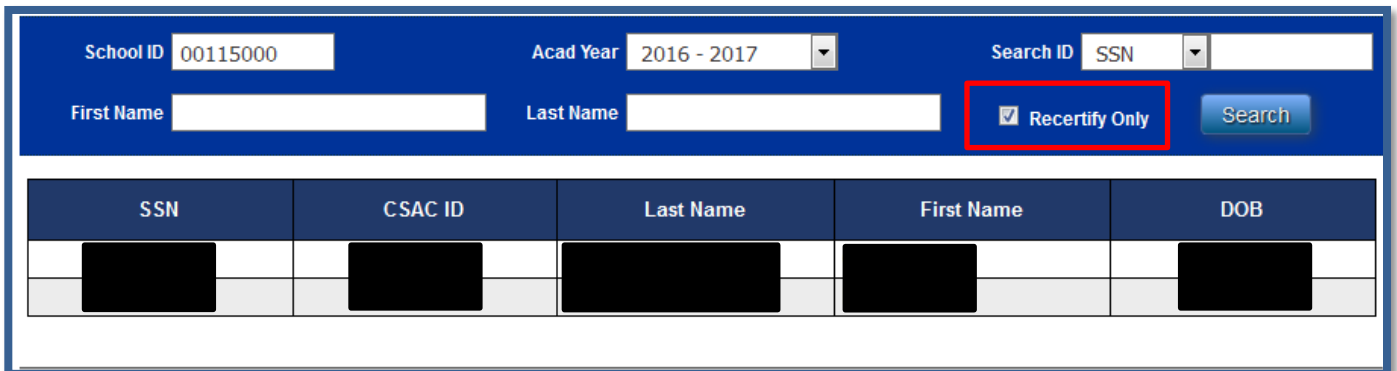
NOTE: This includes records where the Eligibility/Fee change recalculation process results in an MCS Term Award amount = \$0.00. In the instances where this particular term is the only term that the student is attending, the student’s annual MCS award will also be set to \$0.00, and the school will be 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**. To recertify means the campus needs to go in and verify the new payment amount. Recertify happens when the student was previously paid for the term(s) and a correction was applied at the annual and/or term level. The MCS/Cal Grant match process could also cause payments to go into a recertify status. The update to the student’s record triggered the award to be recalculated which then alters the payment amount that was in place.

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”.



SSN	CSAC ID	Last Name	First Name	DOB
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

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 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		Annual Data	
[Redacted]		Open Terms:	Fall, Winter, Spring
CSAC ID:	[Redacted]	Total Income:	\$102,570 <input type="text" value="\$ 115,000"/>
SSN No:	XXX - XX - 5041	Federal Aid:	\$0 <input type="text"/>
DOB:	[Redacted]	Institutional Aid:	\$0 <input type="text"/>
Cal Grant Award:	\$0	Total Elig-%:	400.00
Annual Tuition/Fees:	\$5,472	Used Elig-%:	0.00
Annual Award:	\$1,644	Remain Elig-%:	400.00
Asset Amount:	\$0	Year Entered:	2016
TCP/5th Yr-Indicator:		ISIR Tran #:	02 <input type="text" value="03"/>
Education Level:	1st year, attended college before	Eligibility Change:	Eligibility <input type="button" value="▼"/> Payment History

Transaction Type: Correction Payment

FALL TERM	SPRING TERM
Enrollment Status: <input type="text" value="--- SELECT ---"/>	Enrollment Status <input type="text" value="--- SELECT ---"/>
Term Award Amount <input type="text" value="\$822"/> [\$822]	Term Award Amount <input type="text" value="\$822"/> [\$822]
Adj. Reason Code <input type="text" value="--- SELECT ---"/>	Adj. Reason Code <input type="text" value="--- SELECT ---"/>
Amount Paid/Verified <input type="text"/>	Amount Paid/Verified <input type="text"/>
Tuition/Fees <input type="text"/> [\$2,736]	Tuition/Fees <input type="text"/> [\$2,736]
Federal Aid <input type="text"/> [\$0]	Federal Aid <input type="text"/> [\$0]
Institutional Aid <input type="text"/> [\$0]	Institutional Aid <input type="text"/> [\$0]
State Aid <input type="text"/> [\$0]	State Aid <input type="text"/> [\$0]
Payment Status: Not Reconciled	Payment Status: Not Reconciled

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

Note: You cannot enter a higher Tuition/Fee amount than allowed for the term. If a higher amount is entered, the system will reject the transaction when processed. The rejected transaction can be viewed on the MCS Accept/Reject Report.

- If the student is in a Teacher Credential Program (TCP), you must use the “Add Teacher Credential Program/5th Year Program Flag” function at the annual level.

Demographic Information		Annual Data	
CSAC ID:	[REDACTED]	Open Terms:	Fall, Winter, Spring
SSN No:	XXX - XX - 5041	Total Income:	\$102,570 <input type="text"/>
DOB:	[REDACTED]	Federal Aid:	\$0 <input type="text"/>
Cal Grant Award:	\$0	Institutional Aid:	\$0 <input type="text"/>
Annual Tuition/Fees:	\$5,472	State Aid:	\$0 <input type="text"/>
Annual Award:	\$1,644	ISIR Tran #:	02 <input type="text"/>
Asset Amount:	\$0	Eligibility Change:	<input type="text" value="--- SELECT ---"/> Payment History
TCP/5th Yr-Indicator:			
Education Level:	1st year, attended college before		

Transaction Type: Correction **Payment**

FALL TERM	SPRING TERM
Enrollment Status: <input type="text" value="--- SELECT ---"/>	Enrollment Status <input type="text" value="--- SELECT ---"/>
Term Award Amount <input type="text" value="\$822"/> [\$822]	Term Award Amount <input type="text" value="\$822"/> [\$822]
Adj. Reason Code <input type="text" value="Fees"/>	Adj. Reason Code <input type="text" value="--- SELECT ---"/>
Amount Paid/Verified <input type="text" value="\$0"/>	Amount Paid/Verified <input type="text"/>
Tuition/Fees <input type="text" value="\$1,368"/> [\$2,736]	Tuition/Fees <input type="text"/> [\$2,736]
Federal Aid <input type="text"/> [\$0]	Federal Aid <input type="text"/> [\$0]
Institutional Aid <input type="text"/> [\$0]	Institutional Aid <input type="text"/> [\$0]
State Aid <input type="text"/> [\$0]	State Aid <input type="text"/> [\$0]
Payment Status: Not Reconciled	Payment Status: Not Reconciled

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, and 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

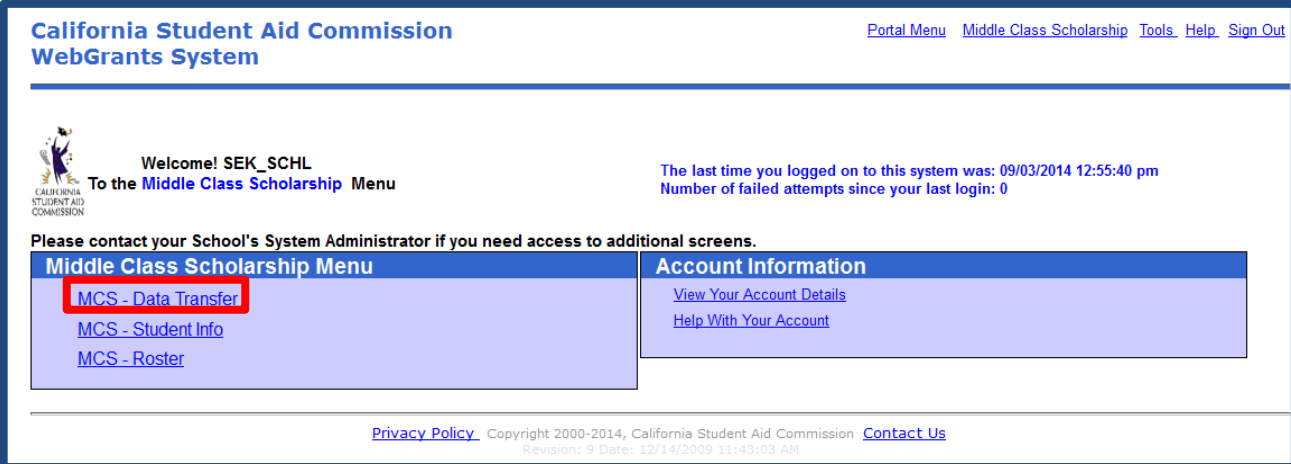
4.1 INTRODUCTION:

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 from 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.

4.2 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.

✚ For detailed log-in instructions, refer back to Sections 2.1 and 2.3
2. Select the ***Middle Class Scholarship*** menu option then select ***MCS – Data Transfer***.



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

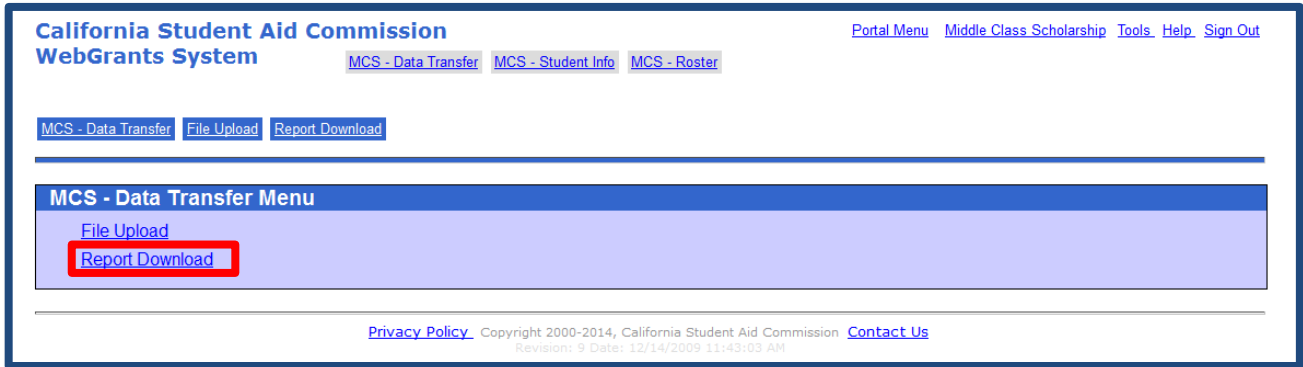
Please contact your School's System Administrator if you need access to additional screens.

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

Privacy Policy Copyright 2000-2014, California Student Aid Commission Contact Us
Revision: 9 Date: 12/14/2009 11:43:03 AM

Middle Class Scholarship Menu – MCS Data Transfer Menu

3. The system will display the ***MCS – Data Transfer Menu*** screen.
4. Select the ***Report Download*** menu selection.



California Student Aid Commission
WebGrants System

Portal Menu Middle Class Scholarship Tools Help Sign Out

MCS - Data Transfer MCS - Student Info MCS - Roster

MCS - Data Transfer File Upload Report Download

MCS - Data Transfer Menu

File Upload
Report Download

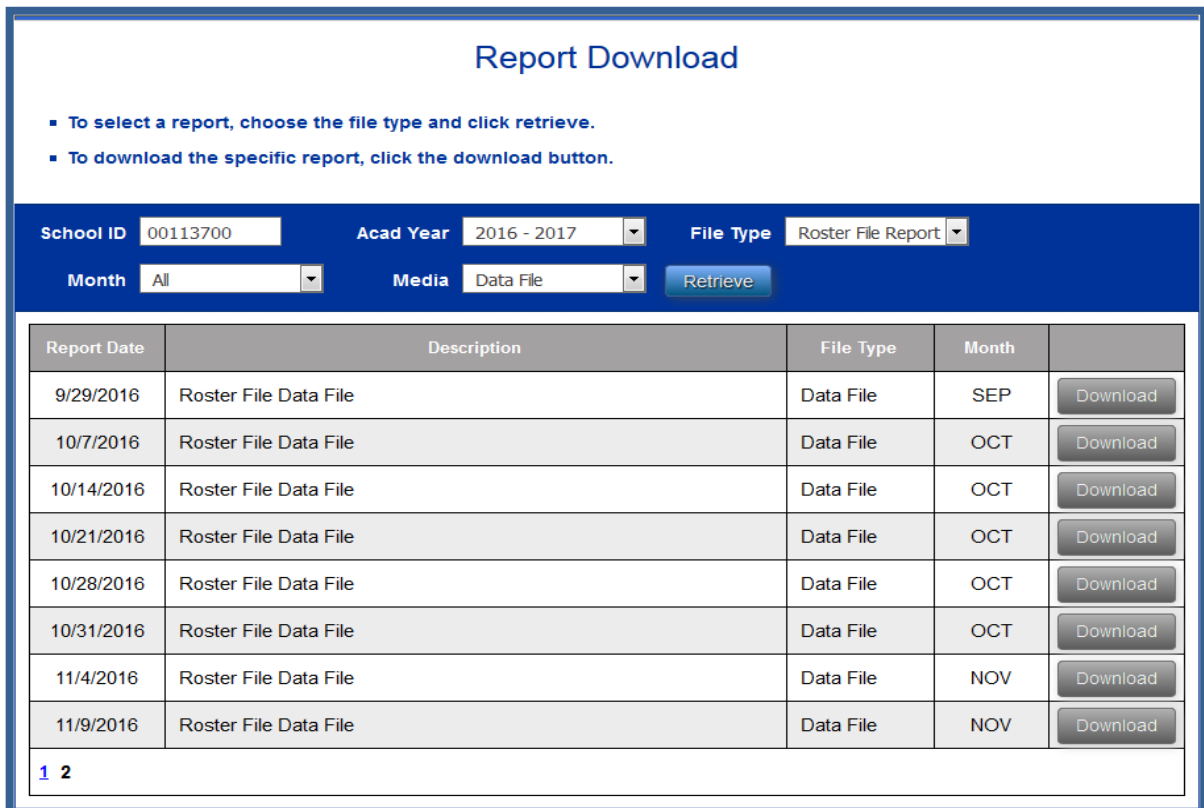
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Revision: 9 Date: 12/14/2009 11:43:03 AM

MCS Data Transfer Menu – Report Download

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

- Select the **Retrieve** button.



Report Download

- To select a report, choose the file type and click retrieve.
- To download the specific report, click the download button.

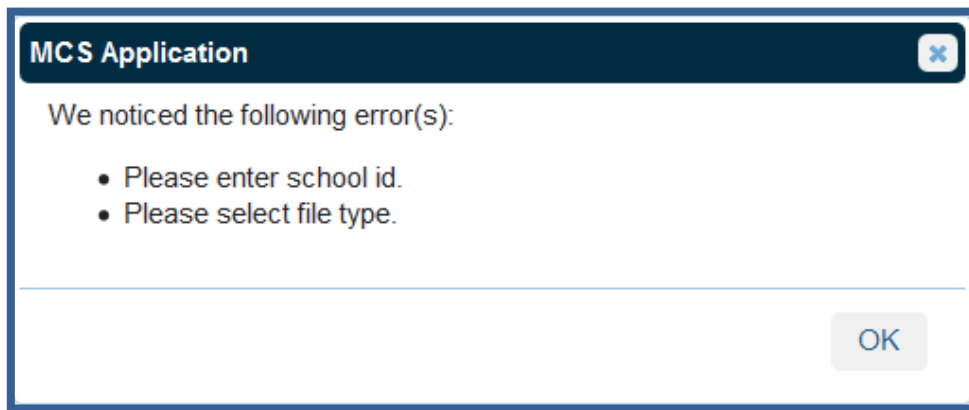
School ID: 00113700 Acad Year: 2016 - 2017 File Type: Roster File Report
Month: All Media: Data File Retrieve

Report Date	Description	File Type	Month	
9/29/2016	Roster File Data File	Data File	SEP	Download
10/7/2016	Roster File Data File	Data File	OCT	Download
10/14/2016	Roster File Data File	Data File	OCT	Download
10/21/2016	Roster File Data File	Data File	OCT	Download
10/28/2016	Roster File Data File	Data File	OCT	Download
10/31/2016	Roster File Data File	Data File	OCT	Download
11/4/2016	Roster File Data File	Data File	NOV	Download
11/9/2016	Roster File Data File	Data File	NOV	Download

1 2

MCS Data Transfer Menu – Report Download Screen

8. If the **School ID** and **File Type** are not selected the system will display an exception message.
9. Select the **OK** button.
10. The system will display the **MCS Report Download** screen.



MCS Report Download – Exception Message

11. If there is no data to report, the system will display an exception message.
12. Select the **OK** button.
13. The system will default back to the **MCS Report Download** screen.



MCS Report Download – No Data Found Exception Message

14. 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*.

Report Download

- To select a report, choose the file type and click retrieve.
- To download the specific report, click the download button.

School ID
 Acad Year
 File Type

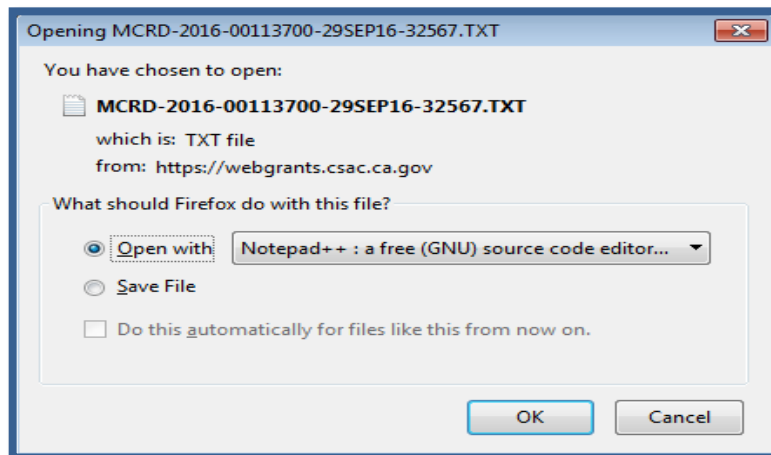
Month
 Media

Report Date	Description	File Type	Month	
9/29/2016	Roster File Data File	Data File	SEP	<input type="button" value="Download"/>
10/7/2016	Roster File Data File	Data File	OCT	<input type="button" value="Download"/>
10/14/2016	Roster File Data File	Data File	OCT	<input type="button" value="Download"/>
10/21/2016	Roster File Data File	Data File	OCT	<input type="button" value="Download"/>
10/28/2016	Roster File Data File	Data File	OCT	<input type="button" value="Download"/>
10/31/2016	Roster File Data File	Data File	OCT	<input type="button" value="Download"/>
11/4/2016	Roster File Data File	Data File	NOV	<input type="button" value="Download"/>
11/9/2016	Roster File Data File	Data File	NOV	<input type="button" value="Download"/>

1 2

MCS Report Download – MCS Roster File Report

15. To review the content in the report, select the **Download** button.
16. The system will display the **MCS Roster File Report** dialogue box.
17. Select the **OK** button.



MCS Report Download – MCS Student Roster File Report Dialogue Box

18. 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.

Roster File Data Report:

Example: MCS Roster File Data Report

MCSR09	00113700SCSU FULLERTON		201609302016	
001137120161111111SMITH		JOHN	H1998101201100001285040000000000000000000	01050000547200525
0011371201622222222CASE		FRAN	1998080702100001054260000000000000000000	01590000547200795
0011371201633333333TESTING		GINA	199703170410000107864000000000000000000001	10154800054720077400774
0011371201644444444DOE		ANDREA	Y1997011503100000777970000000000000000000	00390000547200195
MCFT09	00113700SCSU FULLERTON		201609302016000000000004	

000273600000000000000000000000000000	000000000000000000000000000525	00027360000000000000000000000000	0000004000000000400002016
000273600000000000000000000000000000	0000000000000000000000000000795	00027360000000000000000000000000	0000004000000000400002016
000273600000000000000000000000000000	000000000000000000000000000077400774	00027360000000000000000000000000 2	0000014000010000300002016
000273600000000000000000000000000000	00000000000000000000000000000195	00027360000000000000000000000000	0167004000000000400002016

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. To complete the process of downloading the report, the user must use the **MCS – Data Transfer** menu. To review the content of the reports, select the **Download** button.

Admission File Report:

The **Admission File Report** is only available in the Data File format (Media type). The report 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	00132000	Acad Year	2016 - 2017	File Type	Admission File Rep
Month	All	Media	Data File	Retrieve	

Report Date	Description	File Type	Month	
4/15/2016	Admission File Data File	Data File	APR	Download

Example: MCS Admission Process Summary Report

```

MCS_ADMI                                CALIFORNIA STUDENT AID COMMISSION                                PAGE: 1
BATCH DATE: 04/15/2016                  MCS ADMISSION PROCESS SUMMARY REPORT                                RUN DATE: 04/15/2016
                                          ACADEMIC YEAR 2016                                                RUN TIME: 17:48:55

File was uploaded on 04/11/2016 by user USER_ID

0013202201688888888888GUESS             TEST             M200101262
Rejected - Invalid Date of Birth: 20010126

-----
Summary Information
-----
Total Number      Accepted      Rejected
of Records        Records       Records
-----
27602             27601         1
-----

REPORT DEFINITIONS

Accepted - Passed all valid content tests.
Rejected - Failed a valid content test.

```

Enrollment File Report:

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 were processed by the Commission during the week.

- a) The **Data File** format will display an error code that begins with an alpha value of “I” for ineligible or “R” for rejected followed by a three digit code that identifies the error (I002, R020, R031). The student’s information is provided after the error codes.

School ID Acad Year File Type

Month Media

Report Date	Description	File Type	Month	
8/5/2016	MCS Enrollment Process Eligibility Summary Data File	Data File	AUG	<input type="button" value="Download"/>
8/5/2016	MCS Enrollment Process Eligibility Summary Data File	Data File	AUG	<input type="button" value="Download"/>
9/29/2016	MCS Enrollment Process Eligibility Summary Data File	Data File	SEP	<input type="button" value="Download"/>
10/7/2016	MCS Enrollment Process Eligibility Summary Data File	Data File	OCT	<input type="button" value="Download"/>

Example: MCS Enrollment Process Eligibility Summary Report (Data File Format)

MCS	ED	00132100	UNIV OF CA - SANTA CRUZ		
R031		000001111	CHRIS	TEST	19970606
R026	R031	000002222	TESTER	PHELPS	G 19950221
R031		111111111	HUGO	BOSS	19940709
R020		222222222	KAY	TESTER	19870425
R013		333333333	TESTING	LEVEL	19802130
R013		444444444	PARAMETER	TESTING	19650612
I006		555555555	JOHN	LASTNAME	19970624
I006		666666666	JANET	CASE	M 19990423
I002		777777777	LISA	INCOME	L 19931226

- b) The **Report** format will display the data that was uploaded for the student along with the ineligible and rejected codes. A full description of the ineligible and rejected codes is also provided.

School ID Acad Year File Type Month Media

Report Date	Description	File Type	Month	
8/5/2016	MCS Enrollment Process Eligibility Summary Report	Report File	AUG	<input type="button" value="Download"/>
8/5/2016	MCS Enrollment Process Eligibility Summary Report	Report File	AUG	<input type="button" value="Download"/>
9/29/2016	MCS Enrollment Process Eligibility Summary Report	Report File	SEP	<input type="button" value="Download"/>
10/7/2016	MCS Enrollment Process Eligibility Summary Report	Report File	OCT	<input type="button" value="Download"/>

Example: MCS Enrollment Process Eligibility Summary Report (Report Format)

```

MCS_ENRL          CALIFORNIA STUDENT AID COMMISSION          PAGE: 1
BATCH DATE: 08/05/2016      MCS ENROLLMENT PROCESS ELIGIBILITY SUMMARY REPORT      RUN DATE: 08/05/2016
                                ACADEMIC YEAR 2016                                RUN TIME: 11:32:44

File was uploaded on 08/01/2016 by user TEST1_DR

00132122016000001111TEST          CHRIS          199706061031          01000000000000000000000000000000
R031 Rejected - Student's EL is not consistent with the TCP/5th Year Flag

00132122016000002222PHELPS          TESTER          G199502212023          31000000000000000000000000000000
R026 Rejected - Student's EFC is Blank
R031 Rejected - Student's EL is not consistent with the TCP/5th Year Flag

00132122016111111111BOSS          HUGO          19940709204          52000000857700000000000000000000
R031 Rejected - Student's EL is not consistent with the TCP/5th Year Flag

00132122016222222222TESTER          KAY          198704252013          52000001791300000000000000000000
R020 Rejected - Student's Last Name does not match the ISIR value

00132122016333333333LEVEL          TESTING          198021302011          62000003519600000000000000000000
R013 Rejected - Invalid Grade Level: 6

001321220164444444444TESTING          PARAMETER          196506122253          72000000000000000000000000000000
R013 Rejected - Invalid Grade Level: 7

001321220165555555555LASTNAME          JOHN          199706241012          01000001349700000000000000000000
I006 Ineligible - Student did not meet the deadline date: 20160419

00132122016666666666CASE          JANET          M199904231012          11000005173500000000000000000000
I006 Ineligible - Student did not meet the deadline date: 20160410

001321220167777777777INCOME          LISA          L19931226203          41000016911900000000000000000000
I002 Ineligible - Total Income Exceeds Limit: 0000169119

-----
Summary Information
-----
Total Number    Eligible    Rejected    Ineligible    Rended
of Records      Records    Records    Records    Records
-----
          10             1             6             3             0
-----

REPORT DEFINITIONS

Eligible - Passed all reject and eligibility tests.
Rejected - Failed a valid content test or a comparison with CSAC data.
Ineligible - Not rejected, but did not meet eligibility requirements for the MCS award.
Rended - Eligible, but not the first school to upload an eligible record.
  
```

Award Rejects Report:

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.

The report displays the information provided by the campuses and compares it to the information that CSAC holds. This allows campuses to view the discrepancy between both entities. The student data from the enrollment file displays on the left side of the report. The data that CSAC holds for the student displays on the right side of the report. (Refer to the report snapshot provided on the next page).

Fixing the Student Data Discrepancy:

- If CSAC holds the incorrect information for the student, the system can be updated once proof of the information is submitted by the student or campus. A copy of their California Driver's License or Identification Card and Social Security card must be sent to the Institutional Support Unit, attention to "MCS Processing". If the student was recently married and the driver's license or identification card does not reflect the new name, a copy of the marriage certificate must be included as well.
- If the information in the enrollment record is invalid and CSAC holds the correct data, the campus needs to correct it on their end and upload a new enrollment record for the student.
- Once the record is fixed, the student will be removed from the report and ran through the next MCS award cycle.

School ID Acad Year File Type

Month Media

Report Date	Description	File Type	Month	
10/7/2016	Award Rejects Report	Report File	OCT	<input type="button" value="Download"/>
10/14/2016	Award Rejects Report	Report File	OCT	<input type="button" value="Download"/>
10/21/2016	Award Rejects Report	Report File	OCT	<input type="button" value="Download"/>
10/28/2016	Award Rejects Report	Report File	OCT	<input type="button" value="Download"/>

Example: MCS Awards Reject Report

MCS_AWD
BATCH DATE: 10/28/2016

CALIFORNIA STUDENT AID COMMISSION
MCS AWARD REJECTS REPORT
ACADEMIC YEAR 2016
00131400 - UNIV OF CA - IRVINE

PAGE: 1
RUN DATE: 10/28/2016
RUN TIME: 20:31:12

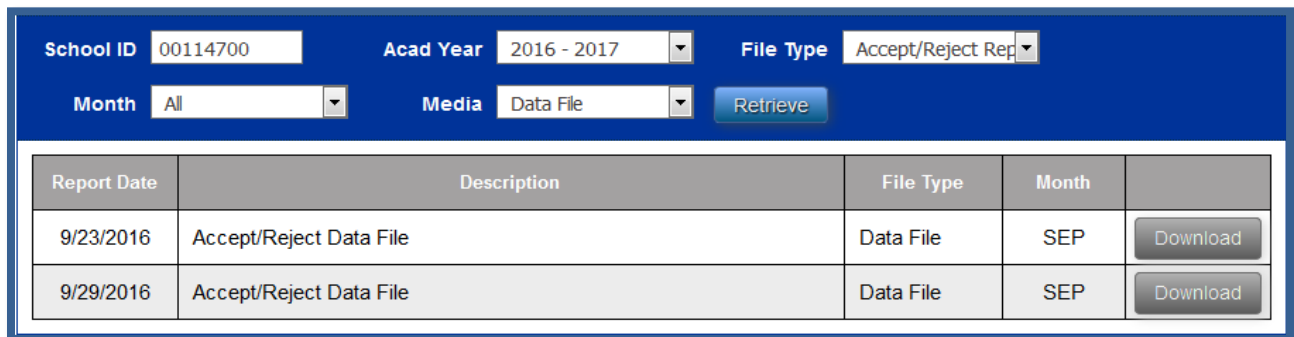
MCS ENROLLMENT DATA:

SSN	LAST NAME	FIRST NAME	MI	DOB	REJECT REASON	CSAC DATA:	LAST NAME	FIRST NAME	MI	DOB
00000000	NATOOLO	LYDIA		19721130	Already exists but with different first and last name	BURNAM	LYDIAN			19721130
11111111	ALI	SAMIHA		19961010	Already exists but with different DOB	ALI	SAMIHA			19961001
22222222	HUR	LANA		19781020	Already exists but with different first and last name	HO	HYONNI			19781020
33333333	YANG	JUDY		19711116	Already exists but with different first and last name	YI	HUI	S		19711116
44444444	SITHU	JAKE		19931209	Already exists but with different first and last name	MAUNG	KYAW	S		19931209
55555555	LEE	STACY	H	19850406	Already exists but with different first and last name	KIM	HONGJOO	L		19850406
66666666	DUCKWORTH	ALICIA	M	19941114	Already exists but with different DOB	DUCKWORTH	ALICIA	M		19941121
77777777	REYES	ULISES		19980813	Already exists but with different DOB	REYES	ULISES			19980816
88888888	XU	SHAO JUAN		19940305	Already exists but with different DOB	XU	SHAOJUAN			19920305
99999999	RAMIREZ	DIANA	L	19950827	Already exists but with different first and last name	VIELMAN	DIANALINETH	R		19950827

Total number of rejects: 10

Accept/Reject Report:

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: Exception, Rejected and Accepted. The report will display the most recent transactions that have been processed by the Commission.



The screenshot shows a search interface with the following fields: School ID (00114700), Acad Year (2016 - 2017), File Type (Accept/Reject Rep), Month (All), and Media (Data File). A 'Retrieve' button is present. Below the filters is a table with the following data:

Report Date	Description	File Type	Month	
9/23/2016	Accept/Reject Data File	Data File	SEP	Download
9/29/2016	Accept/Reject Data File	Data File	SEP	Download

Example: MCS Accept/Reject Report

Exception Section:

This occurs when the system cannot define the type of transaction being applied to the record. The transaction submitted is invalid or there is no valid transaction for the record in the file.

The majority of records that appear under this section stem from the attempt to apply a payment and correction to the same student within the same file. Or, when attempting to make annual and term level corrections for the same student.

- If making annual level changes, make sure fields 15-40 are null
- If making term level changes, make sure fields 11-14 are null

SSN	LAST NAME	FIRST NAME	MI	DOB DATE	TXN TYPE	FILE DATE	USER NAME
55555555	ALABAMA	MARY	A	01/05/1998	C	09/28/2016	USER_ID
8: Invalid transaction type code for adjustment reason transaction							
66666666	LARA	BRIAN		12/20/1997	C	09/28/2016	USER_ID
24: Invalid Education Level							
77777777	TIME	JACOB	A	08/10/1998	C	09/29/2016	USER_ID
4: No valid transaction contained in the record							
<hr/>							
TOTALS							
BATCH -	RECORDS REJECTED:	2					
ONLINE -	RECORDS REJECTED:	1					
COMBINED -	RECORDS REJECTED:	3					

Rejected Section:

The payment or correction was rejected due to an edit in place for the transaction. Many times the information being submitted is not in a correct format.

```

mcs_pay                                CALIFORNIA STUDENT AID COMMISSION                                PAGE: 2
BATCH DATE: 09/29/2016                MCS ACCEPT/REJECT REPORT                                RUN DATE: 09/29/2016
                                         ACADEMIC YEAR 2016                                    RUN TIME: 12:03:36
                                         00114700 - CSU FRESNO

*****
***** REJECTED SECTION *****
*****

SSN      LAST NAME      FIRST NAME  M  PROCESS  TERM  ENROLL  PAY  ADJ  ELIG  TXN
          I  DATE      STATUS  AMOUNT  RSN  CHANGE  TYPE
-----  -
333333333  MAC          KAY          09/27/2016  AY          8      C
28: Student is already in TCP or 5th Year Program

444444444  PAGE        RAY          09/29/2016  AY          9      C
26: Insufficient remaining eligibility for the selected transaction

-----
TOTALS
BATCH -      TRANSACTIONS REJECTED:      0      AMOUNT REJECTED:      .00
ONLINE -     TRANSACTIONS REJECTED:      2      AMOUNT REJECTED:      .00
COMBINED -   TRANSACTIONS REJECTED:      2      AMOUNT REJECTED:      .00

-----
KEY
ENROLL STATUS CODE      ADJ RSN CODE      ELIG CHANGE CODE
1  FT (PAY)              1  POST BACC        0  EDUCATIONAL LEVEL CHANGE
2  LESS THAN HT - (DO NOT PAY)  2  SAP              1  POST BACC
3  NOT ENROLLED          3  ELIGIBILITY      2  SAP
4  HT (PAY)              4  FEES              3  ELIGIBILITY
5  REFUND/ADJ PAYMENT    5  NOT ENROLLED     4  OTHER
6  RECERTIFY PAYMENT     6  OTHER             5  OTHER
7  OTHER                  7  OVER ASSET CEILING
8  ADD TCP/5TH YR       8  REMOVE TCP/5TH YR
9  REMOVE TCP/5TH YR

```

Accepted Section:

The payment or correction was accepted and applied to the student's record.

SSN	LAST NAME	FIRST NAME	M	PROCESS	TERM	ENROLL	PAY	ADJ	ELIG	TXN	RECERTIFY	
			I	DATE		STATUS	AMOUNT	RSN	CHANGE	TYPE	REQUIRED	
000000011	CARNIVAL	PATRICIA	M	09/26/2016	FL	1	128			P		
000000011	CARNIVAL	PATRICIA	M	09/26/2016	WN	1	128			P		
000000011	CARNIVAL	PATRICIA	M	09/26/2016	SP	1	128			P		
000000022	FIG	ERNEST	A	09/26/2016	FL	1	30			P		
111111111	FOUR	SARAH	A	09/26/2016	FL	4	88			P		
111111111	FOUR	SARAH	A	09/26/2016	WN	4	88			P		
111111111	FOUR	SARAH	A	09/26/2016	SP	4	88			P		
222222222	GROSS	MICK	W	09/29/2016	AY				0	C		
TOTALS												
BATCH -	TRANSACTIONS ACCEPTED:	0	AMOUNT ACCEPTED:									.00
ONLINE -	TRANSACTIONS ACCEPTED:	8	AMOUNT ACCEPTED:									.00
COMBINED -	TRANSACTIONS ACCEPTED:	8	AMOUNT ACCEPTED:									.00

KEY		
ENROLL STATUS CODE	ADJ RSN CODE	ELIG CHANGE CODE
1 FT (PAY)	1 POST BACC	0 EDUCATIONAL LEVEL CHANGE
2 LESS THAN HT - (DO NOT PAY)	2 SAP	1 POST BACC
3 NOT ENROLLED	3 ELIGIBILITY	2 SAP
4 HT (PAY)	4 FEES	3 ELIGIBILITY
	5 REFUND/ADJ PAYMENT	4 NOT ENROLLED
	6 RECERTIFY PAYMENT	5 OTHER
	7 OTHER	7 OVER ASSET CEILING
		8 ADD TCF/5TH YR
		9 REMOVE TCF/5TH YR

**** END OF REPORT FOR SCHOOL: 00114700 - CSU FRESNO ****

Payment Activity Report:

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 to the institutions, payment transactions, balances along with 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 to date.

School ID	<input type="text" value="00114600"/>	Acad Year	<input type="text" value="2016 - 2017"/>	File Type	<input type="text" value="Payment Activity"/>
Month	<input type="text" value="All"/>	Media	<input type="text" value="Report"/>	<input type="button" value="Retrieve"/>	

Report Date	Description	File Type	Month	
11/4/2016	Payment Activity Report	Report File	NOV	<input type="button" value="Download"/>
11/9/2016	Payment Activity Report	Report File	NOV	<input type="button" value="Download"/>

Example: MCS Payment Activity Report

MCS_RCON BATCH DATE: 11/10/2016	CALIFORNIA STUDENT AID COMMISSION MCS PAYMENT ACTIVITY REPORT ACADEMIC YEAR 2016	PAGE: 1 RUN DATE: 11/10/2016 RUN TIME: 14:59:01		
ACCOUNTING SUMMARY 00114600 - CSU CHICO				
DATE	ACTIVITY	FUNDS DISBURSED TO INSTITUTION	PAYMENT TRANSACTIONS	BALANCE
08-08-16	RECONCILED PAYMENT TRANSACTIONS		810.00	-810.00
08-08-16	PAYMENT TO INSTITUTION	810.00		0.00
09-09-16	RECONCILED PAYMENT TRANSACTIONS		200.00	-200.00
09-09-16	PAYMENT TO INSTITUTION	200.00		0.00
09-14-16	RECONCILED PAYMENT TRANSACTIONS		2,999.00	-2,999.00
09-14-16	PAYMENT TO INSTITUTION	2,999.00		0.00
09-16-16	RECONCILED PAYMENT TRANSACTIONS		822.00	-822.00
09-16-16	PAYMENT TO INSTITUTION	822.00		0.00
09-29-16	RECONCILED PAYMENT TRANSACTIONS		-822.00	822.00
09-29-16	PAYMENT TO INSTITUTION	0.00		822.00
TOTAL AMOUNT REPORTED TO COMMISSION -		4,009.00		
TOTAL PAYMENTS DISBURSED TO SCHOOL -		4,831.00		
TOTAL BALANCE UP TO DATE -		822.00		
MCS_RCON BATCH DATE: 11/10/2016	CALIFORNIA STUDENT AID COMMISSION MCS RECON BATCH REPORT ACADEMIC YEAR 2016	PAGE: 2 RUN DATE: 11/10/2016 RUN TIME: 14:59:01		
PAYMENT TRANSACTION SUMMARY 00114000 - CSU CHICO				
YEAR-TO-DATE ACTIVITY				
	FALL	WINTER	SPRING	TOTAL
PAYMENT AMOUNT	2,783.00	0.00	1,226.00	4,009.00
TRANSACTION COUNT	6	0	2	8
**** END OF REPORT **** FOR SCHOOL: 00114600 **** CSU CHICO ***				

MCS CG Sync Report:

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 data match process ran. An overall summary of the students eligibility status change is also provided at the end of the report. The report will display the most recent transactions that have been processed by the Commission.

School ID	00131300	Acad Year	2016 - 2017	File Type	MCS CG Sync Rep
Month	All	Media	Report	Retrieve	

Report Date	Description	File Type	Month	
9/7/2016	MCS CG Sync Report	Report File	SEP	Download

Example: MCS/Cal Grant Processing Report

MCS CG S		CALIFORNIA STUDENT AID COMMISSION										PAGE: 1		
BATCH DATE: 09/07/2016		MCS/CAL GRANT PROCESSING REPORT										RUN DATE: 09/09/2016		
		ACADEMIC YEAR 2016										RUN TIME: 16:20:58		
		00131300 - UNIV OF CA - DAVIS												
STUDENT SSN	STUDENT LAST NAME	STUDENT FIRST NAME	CAL GRANT AMTS BEFORE PROCESSING			CAL GRANT AMTS AFTER PROCESSING			MCS AWARD AMTS BEFORE PROCESSING			MCS AWARD AMTS AFTER PROCESSING		
			FL	WN	SP	FL	WN	SP	FL	WN	SP	FL	WN	SP
123123456	TEST	KATHLEEN	1824	1824	1824	2736	0	2736	0	0	0	0	1229	0
222334444	CASE	JANE	3028	3028	3028	4542	0	4542	0	0	0	0	1229	0
333445555	CAMPUS	ALEX	552	552	552	828	0	828	816	816	816	608	1229	608
			Payments Set To Recertify			No Payments Set To Recertify			Total					
Eligible - Award Amount Increased			0			0			0					
Eligible - Award Amount Decreased			0			1			1					
Eligible - Award Amount Unchanged			0			0			0					
Ineligible to Eligible			0			2			2					
Eligible to Ineligible			0			0			0					
Remained Ineligible (not listed above)			0			0			0					
Cal Grant Unchanged (not listed above)			0			0			0					
Total excludes the number of pending records found in the MCS Enrollment Process Eligibility Summary Report.														

Student Reconciliation Report:

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 will appear in the report.

School ID	04127100	Acad Year	2016 - 2017	File Type	Student Reconcilia
Month	All	Media	Report	Retrieve	

Report Date	Description	File Type	Month	
10/14/2016	Student Reconciliation Report	Report File	OCT	Download
10/21/2016	Student Reconciliation Report	Report File	OCT	Download
10/31/2016	Student Reconciliation Report	Report File	OCT	Download
11/4/2016	Student Reconciliation Report	Report File	NOV	Download
11/9/2016	Student Reconciliation Report	Report File	NOV	Download

Example: MCS Student Reconciliation Report

MCS_RCON	CALIFORNIA STUDENT AID COMMISSION				PAGE:	1
BATCH DATE: 11/09/2016	MCS STUDENT RECONCILIATION REPORT				RUN DATE:	11/10/2016
	ACADEMIC YEAR 2016				RUN TIME:	14:59:01
04127100 - UNIV OF CA - MERCED						
SSN	LAST NAME	FIRST NAME	M	TERM	AMOUNT PAID	PAY DATE
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111227859	SO	KARLA		FL	822.00	09/27/2016
					822.00	
111337754	GARZA	GEORGIA	L	FL	951.00	10/31/2016
111337754	GARZA	GEORGIA	L	SP	951.00	10/31/2016
					1,902.00	
111449952	CORENA	PAUL	A	FL	821.00	11/08/2016
111449952	CORENA	PAUL	A	SP	821.00	11/08/2016
					1,642.00	
YEAR-TO-DATE ACTIVITY						
	FALL		WINTER		SPRING	
PAYMENT AMOUNT:	2,594.00		0.00		1,772.00	
GRAND TOTAL:	4,366.00					
NUMBER OF STUDENTS PAID: 3						
**** END OF REPORT **** FOR SCHOOL: 04127100 **** UNIV OF CA - MERCED ****						

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 - SCENARIOS
CORRECTIONS AND PAYMENTS**

Scenario	Annual or Term Level Transaction	MCS Online Payment Roster Screen (Manual Process)	Batch – Payment/Correction File (Upload Process)
<p>1. Posting Full-Time Payment</p> <p>-Payment amount must equal the term award amount</p> <p>- A Full-Time payment will use full eligibility for the term: Semester = 50.00% Quarter = 33.33%</p>	<p>Term</p>	<ul style="list-style-type: none"> • Select Payment radio button • Select “FT-(Pay)” from the Enrollment Status drop down field • The Amount Paid/Verified field is automatically populated with the term award amount • Hit the Save button <p><u>Results:</u> The update to the record will be available the following Monday. The payment will show as applied and the Payment Status for the term will show as Reconciled.</p>	<ul style="list-style-type: none"> • Fields 15/16/17 (Student’s Fall/Winter/Spring Enrollment Status) – Enter 1 for FT-(Pay) • Fields 21/28/35 (Fall/Winter/Spring MCS Award Payment) – Enter the term award amount • Field 42 (Transaction Type) – Enter P for “Payment Information” <p><u>Results:</u> The update to the record will be available the following Monday. The payment will show as applied and the Payment Status for the term will show as Reconciled.</p>

<p>2. Posting Half-Time Payment</p> <p>-Payment amount must equal the term award amount</p> <p>- A Half-Time payment will use half eligibility for the term: Semester = 25.00% Quarter = 16.66%</p> <p><i>If the term award amount should be a lower amount, the campus should reduce the Tuition/Fees prior to applying the payment. If the fees are not reduced, the student will get paid at the full term award amount in place and the payment will use half of the eligibility.</i></p>	<p>Term</p>	<ul style="list-style-type: none"> • Select Payment radio button • Select “HT-(Pay)” from the Enrollment Status drop down field • The Amount Paid/Verified field is automatically populated with the term award amount • Hit the Save button <p><u>Results:</u> The update to the record will be available the following Monday. The payment will show as applied and the Payment Status for the term will show as Reconciled.</p>	<ul style="list-style-type: none"> • Fields 15/16/17 (Student’s Fall/Winter/Spring Enrollment Status) – Enter 4 for HT-(Pay) • Fields 21/28/35 (Fall/Winter/Spring MCS Award Payment) – Enter the term award amount • Field 42 (Transaction Type) – Enter P for “Payment Information” <p><u>Results:</u> The update to the record will be available the following Monday. The payment will show as applied and the Payment Status for the term will show as Reconciled.</p>
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<p>3. Posting a Zero (\$0) Payment</p> <p>-Less Than HT – (Do Not Pay) Or Not Enrolled payment type</p> <p>- A zero payment will not use any eligibility for the term</p>	<p>Term</p>	<ul style="list-style-type: none"> • Select Payment radio button • Select “Less Than HT – (Do Not Pay)” or “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 <p><u>Results:</u> 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 term will show as Reconciled.</p>	<ul style="list-style-type: none"> • Fields 15/16/17 (Student’s Fall/Winter/Spring Enrollment Status) – Enter “2” for Less Than HT – (Do Not Pay) or “3” for Not Enrolled • Fields 21/28/35 (Fall/Winter/Spring MCS Award Payment) – Enter a \$0 dollar amount • Field 42 (Transaction Type) – Enter P for “Payment Information” <p><u>Results:</u> 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 term will show as Reconciled.</p>
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<p>4. Posting Refund/Adjusted Payment</p> <p>-This option allows campuses to post a payment that is less than the term award amount.</p> <p>-This option can also be used to post a \$0 payment.</p> <p>- A payment greater than \$0, will use full eligibility for the term: Semester = 50% Quarter = 33.33%</p> <p>- A zero payment will not use any eligibility for the term</p>	<p>Term</p>	<ul style="list-style-type: none"> • Select Payment radio button • Select “Refund/Adjusted Payment” from the Adj. Reason Code drop down field • The Amount Paid/Verified field opens up for the campus to input the payment amount • Hit the Save button <p><u>Results:</u> The update to the record will be available the following Monday. The payment will show as applied and the Payment Status for the term will show as Reconciled.</p>	<ul style="list-style-type: none"> • Fields 21/28/35 (Fall/Winter/Spring MCS Award Payment) – Enter the dollar amount • Fields 22/29/36 (Fall/Winter/Spring Adjustment Reason Code) – Enter 5 for Refund/Adjusted Payment • Field 42 (Transaction Type) – Enter P for “Payment Information” <p><u>Results:</u> The update to the record will be available the following Monday. The payment will show as applied and the Payment Status for the term will show as Reconciled.</p>
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<p>5. Student's annual Total Income has increased or decreased</p> <p>-Student does not have any existing payments</p>	<p>Annual</p>	<ul style="list-style-type: none"> • Select Correction radio button • Select "Eligibility " from the Eligibility Change drop down field • Enter new annual total income in the Total Income field • Hit the Save button <p><u>Results:</u> 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.</p> <p><u>NOTE:</u> <i>Multiple annual level changes can be made in the same week. For example, the Total Income and all three annual aid amounts can be updated and submitted as one transaction. These changes are considered annual level changes and use the "Correction" transaction type.</i></p>	<ul style="list-style-type: none"> • Field 11 (Total Income) – Enter new total income • Field 41 (Eligibility Change) – Enter 3 for Eligibility • Field 42 (Transaction Type) – Enter C for "Correction" <p><u>Results:</u> 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.</p>
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<p>6. Student's annual aid has increased or decreased</p> <p>-Student does not have any existing payments</p> <p><u>Annual aid consists of:</u></p> <ul style="list-style-type: none"> • Federal Aid • Institutional Aid • State Aid <p><i>*Do not include Cal Grant awards as part of the annual aid. If the student has an existing Cal Grant, CSAC's system will factor it in when it recalculates.</i></p>	<p>Annual</p>	<ul style="list-style-type: none"> • Select Correction radio button • Select "Eligibility " from the Eligibility Change drop down field • Enter new annual aid into one of the fields: Federal Aid, Institutional Aid, State Aid • Hit the Save button <p><u>Results:</u> The student's MCS award will be recalculated using the new amount(s) entered. 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 amount(s) provided.</p> <p><u>NOTE:</u> <i>Multiple annual level changes can be made in the same week. For example, all three annual aid amounts and the Total Income amount can be updated and submitted as one transaction. These changes are considered annual level changes and use the "Correction" transaction type.</i></p>	<ul style="list-style-type: none"> • Field 12 (Student's Federal Aid) – Enter new annual Pell Grant amount • Field 13 (Student's Institutional Grants and Fee Waivers) – Enter new Institutional Aid amount • Field 14 (Student's State Aid) – Enter new State Aid amount • Field 41 (Eligibility Change) – Enter 3 for Eligibility • Field 42 (Transaction Type) – Enter C for "Correction" <p><u>Results:</u> The student's MCS award will be recalculated using the new amount(s) entered. 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 amount(s) provided.</p>
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<p>7. Student is not eligible for MCS</p> <p><u>Ineligible reasons consist of:</u></p> <ul style="list-style-type: none"> • Post Bacc • SAP • Not Enrolled • Other • Over Asset Ceiling <p>-These selections will withdraw the student from the roster.</p> <p><u>NOTE:</u> <i>Students may have existing reconciled payments. If the payment information needs to be removed; the payments must be taken care of first before applying the ineligible status.</i></p>	<p>Annual</p>	<ul style="list-style-type: none"> • Select Correction radio button • Select one of the ineligible reasons from the Eligibility Change drop down field • Hit the Save button <p><u>Results:</u> Student will be withdrawn from the MCS program and removed from the campus roster the following Monday.</p> <p>If the student has existing reconciled payments, the payments will remain on the record and will not change to a “Recertify Payment” status.</p>	<ul style="list-style-type: none"> • Field 41 (Eligibility Change) – Enter 1-Post Bacc, 2-SAP, 4-Not Enrolled, 5-Other or 7-Over Asset Ceiling • Field 42 (Transaction Type) – Enter C for “Correction” • <i>If a payment exists for either term; make sure to remove the information from the following fields of the payment file:*</i> <ul style="list-style-type: none"> ○ <i>Students’ Enrollment Status (Fields 15, 16, 17)</i> ○ <i>MCS Award Payment (Fields 21, 28, 35)</i> <p><i>*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. This will result with the transaction rejecting and the campus will need to submit it again the following week.</i></p> <p><u>Results:</u> 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 <u>will not</u> change to a “Recertify Payment” status.</p>
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<p>8. School Change</p> <p>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.</p> <p>Campus A – Fall term has a reconciled payment</p> <p>Campus B – Student will be attending the Spring term</p>	<p>Annual and Enrollment File</p>	<p>Campus A: Must withdraw student from their roster by using the Not Enrolled or Other options.</p> <ul style="list-style-type: none"> • Select Correction radio button • Select a reason from the Eligibility Change drop down field (Not Enrolled or Other) • Hit the Save button <p><u>Results:</u> 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.</p> <p>Campus B: Must submit an Enrollment file with the Student Status field designated as a Winter or Spring Transfer (Field 9 = 3-WN or 4-SP). The file can be submitted prior to Campus A withdrawing the student or afterwards.</p> <p>If the Enrollment file is submitted prior to being withdrawn, the student will appear on the MCS Enrollment Process Eligibility Report as a pending record.</p> <p><u>Results:</u> 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 B will only see the Winter and/or Spring terms on their roster, not the Fall term.</p>	<p>Campus A: Must withdraw student from their roster</p> <ul style="list-style-type: none"> • Field 41 (Eligibility Change) – Enter 4-Not Enrolled or 5-Other to remove student from the roster • Field 42 (Transaction Type) – Enter C for “Correction” <p>Campus B – Submit Enrollment File Fields 1-18 of the enrollment file must be completed, with Field 9 specifying the student’s term transfer type:</p> <ul style="list-style-type: none"> • Field 9 (Student’s Status) of the Enrollment File – Submit a 3 for Winter Transfer or 4 for Spring Transfer <p>If the Enrollment file is submitted prior to being withdrawn, the student will appear on the MCS Enrollment Process Eligibility Report as a pending record.</p> <p><u>Results:</u> 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 B will only see the Winter and/or Spring terms on their roster, not the Fall term.</p>
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<p>9. Student's Tuition/Fees has decreased for the term</p>	<p>Term</p>	<ul style="list-style-type: none"> • Select Correction radio button • Fall/Winter/Spring Term(s) = Select "Fees" on Adj. Reason Code drop down field and enter the new Tuition/Fees amount • Hit the Save button <p><u>Results:</u> The student's term(s) will be recalculated using the new Tuition/Fees amount. The update to the MCS award information will be available the following Monday. The student's new term award will be lower based on the new Tuition/Fees amount(s) provided.</p> <p><i>NOTE:</i> Only the term that had a change to their Tuition/Fee will be recalculated.</p> <p><i>i.e. If the Winter term had a change to the Tuition/Fee, only the Winter term will be recalculated, not the Fall or Spring terms.</i></p>	<ul style="list-style-type: none"> • Field 22/29/36 (Fall/Winter/Spring Adjustment Reason Code) – Enter 4 for Fees • Field 23/30/37 (Fall/Winter/Spring Tuition/Fee) – Enter new tuition value • Field 41 (Eligibility Change) – Leave blank • Field 42 (Transaction Type) – Enter C for "Correction" <p><u>Results:</u> The student's term(s) will be recalculated using the new Tuition/Fees amount. The update to the MCS award information will be available the following Monday. The student's new term award will be lower based on the new Tuition/Fees amount(s) provided.</p> <p><i>NOTE:</i> Only the term that had a change to their Tuition/Fee will be recalculated.</p> <p><i>i.e. If the Winter term had a change to the Tuition/Fee, only the Winter term will be recalculated, not the Fall or Spring terms.</i></p>
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<p>10. Student's other aid has increased or decreased for the term</p> <p>-Student does not have any existing payments</p> <p><u>Other aid consists of:</u></p> <ul style="list-style-type: none"> • Federal Aid • Institutional Aid • State Aid 	<p>Term</p>	<ul style="list-style-type: none"> • Select Correction radio button • Fall/Winter/Spring Term(s) = <p>Select "Eligibility" on Adj. Reason Code drop down field and enter in the new aid amount into one of the following fields: Federal Aid, Institutional Aid, State Aid</p> <ul style="list-style-type: none"> • Hit the Save button <p><u>Results:</u> The student's term(s) will be recalculated with new aid 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 amount(s) entered.</p> <p><u>NOTE:</u> Only the term that had a change to their other aid will be recalculated.</p> <p><i>i.e. If the Spring term had a change to their Federal Aid, only the Spring term will be recalculated, not the Fall or Winter terms.</i></p>	<ul style="list-style-type: none"> • Field 22/29/36 (Fall/Winter/Spring Adjustment Reason Code) – Enter 3 for Eligibility • Field 24/31/38 (Fall/Winter/Spring Federal Aid) – Enter new value • Field 25/32/39 (Fall/Winter/Spring Institutional Aid Amount) – Enter new value • Field 26/33/40 (Fall/Winter/Spring State Aid Amount) – Enter new value • Field 42 (Transaction Type) – Enter C for "Correction" • <i>If a payment exists for either term; make sure to remove the information from the following fields of the payment file:*</i> <ul style="list-style-type: none"> ○ Students' Enrollment Status (Fields 15, 16, 17) ○ MCS Award Payment (Fields 21, 28, 35) <p><i>* 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. This will result with the transaction rejecting and the campus will need to submit it again the following week.</i></p> <p><u>Results:</u> The student's term(s) will be recalculated with new aid 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 amount(s) entered.</p> <p><u>NOTE:</u> Only the term that had a change to their other aid will be recalculated.</p> <p><i>i.e. If the Spring term had a change to their Federal Aid, only the Spring term will be recalculated, not the Fall or Winter terms.</i></p>
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<p>11. Recertifying a Payment</p> <p>To recertify means the campus needs to go in and verify the new payment amount. Recertify happens when the student was previously paid for the term(s) and a correction was applied at the annual or term level. The correction caused the award to be recalculated and alters the payment amount that was in place due to the new award amount.</p> <p><u>NOTE:</u> <i>You cannot recertify and apply a payment to the same student in one transaction. The recertify payment must be completed first. The following week, the standard payment(s) can be applied using the Enrollment Status or Refund/Adjusted Payment functions.</i></p>	<p>Term</p>	<p>There are two options available to recertify a payment:</p> <p><u>Option 1 – Using Enrollment Status Function</u></p> <ul style="list-style-type: none"> • Select Payment radio button • Select “FT-(Pay)” or “HT-(Pay)” from the Enrollment Status drop down field • The Amount Paid/Verified field is automatically populated with the new term award amount • Hit the Save button <p><u>Option 2 - Using Refund/Adjusted Payment Function</u></p> <ul style="list-style-type: none"> • Select “Payment” radio button • Select Refund/Adjusted Payment from the Adj. Reason Code drop down field • Enter the new payment amount in the Amount/Paid Verified field. The amount entered should be less than the Term Award Amount. • Hit the Save button <p><u>Results:</u> The update to the record will be available the following Monday. The payment will show as applied and the Payment Status for the term will show as Reconciled. The “Recertify Payment” status will no longer be visible under the “Adj. Reason Code” field.</p>	<p>There are two options available to recertify a payment:</p> <p><u>Option 1 – Using Enrollment Status Function</u></p> <ul style="list-style-type: none"> • Fields 15/16/17 (Student’s Fall/Winter/Spring Enrollment Status) – Enter 1 for FT-(Pay) or 4 for HT-(Pay) • Fields 21/28/35 (Fall/Winter/Spring MCS Award Payment) – Enter the term award amount • Field 42 (Transaction Type) – Enter P for “Payment Information” <p><u>Option 2 - Using Refund/Adjusted Payment Function</u></p> <ul style="list-style-type: none"> • Field 21/28/35 (Fall/Winter/Spring MCS Award Payment) - Enter the dollar amount • Field 22/29/36 (Fall/Winter/Spring Adjustment Reason Code) – Enter 5 for Refund/Adjusted Payment • Field 42 (Transaction Type) – Enter P for “Payment Information” <p><u>Results:</u> The update to the record will be available the following Monday. The payment will show as applied and the Payment Status for the term will show as Reconciled. The “Recertify Payment” code of 6 will no longer appear in Field 22/29/36 of the payment file.</p>
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<p>12. Educational Level Changes</p> <p>-Educational Level (EL) changes are only allowed during the academic year in which the student’s MCS eligibility percentage was established. This function only allows EL changes between 0 – 4.</p> <p>-EL changes to a 5 are only allowed if the student is in a 5th Year or Teacher Credential Program. This functionality is completed by using the “Add TCP/5th Year” transaction.</p> <p><i>To add a TCP/5th Year program flag, go to Scenario #14.</i></p>	<p>Annual</p>	<ul style="list-style-type: none"> • Select “Correction” radio button • Select “Educational Level” from the Eligibility Change drop down field located in the Annual Data section • The “Educational Level” field opens up; select new educational level between 0-4 • Hit the Save button <p><u>Results:</u> The student’s Educational Level change will be updated and available the following Monday.</p>	<ul style="list-style-type: none"> • Field 41 (Eligibility Change) – Enter 0 for Educational Level Change • Field 42 (Transaction Type) – Enter C for “Correction” • Field 46 (Educational Level) – Enter a value between 0 – 4 <p><u>Results:</u> The student’s Educational Level change will be updated and available the following Monday.</p>
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<p>13. Updating the Total Income</p>	<p>Annual</p>	<ul style="list-style-type: none"> • 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 <p><u>Results:</u> The student’s annual award will be recalculated based on the new income amount provided (up to \$156,000). 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 income amount entered.</p> <p><i>NOTE:</i> <i>If the new income exceeds \$156,000 the student will be removed from the campus roster by the following Monday.</i></p>	<ul style="list-style-type: none"> • Field 11 (Total Income) – Enter new income amount • Field 41 (Eligibility Change) - Enter 3 for Eligibility • Field 42 (Transaction Type) – Enter C for “Correction” <p><u>Results:</u> The student’s annual award will be recalculated based on the new income amount provided (up to \$156,000). 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 income amount entered.</p> <p><i>NOTE:</i> <i>If the new income exceeds \$156,000 the student will be removed from the campus roster by the following Monday.</i></p>
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<p>14. Adding the 5th Year and/or Teacher Credential Program (TCP) Flag</p>	<p>Annual</p>	<ul style="list-style-type: none"> • Select Correction radio button • Select “Add TCP/5th Year” on Eligibility Change drop down field located in the Annual Data section • The “TCP or 5th Year” field opens up; select either Add TCP or Add 5th Year • Hit the Save button <p><u>NOTE:</u> CSAC will recalculate the student’s award using the stored amounts for the program and segment type.</p> <p><u>If TCP selected:</u> -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 standard Tuition/Fees.</p> <p><u>-If 5th Year selected:</u> The student’s annual award amount will recalculate using the standard Tuition/Fees for the segment type.</p> <p><u>Results:</u> The update to the MCS award information will be available the following Monday.</p>	<ul style="list-style-type: none"> • Field 41 (Eligibility Change) – Enter 8 for “Add Teacher Credential Program Flag (TCP) / 5th-Yr Program Flag” • Field 42 (Transaction Type) – Enter C for “Correction” • Field 43 (Teacher Credential Program (TCP) / Fifth Year of 5-Year Program Flag) – Enter 1 for “Yes – TCP” or 3 for “Yes – 5th-Yr” <p><u>NOTE:</u> CSAC will recalculate the student’s award using the stored amounts for the program and segment type.</p> <p><u>If TCP selected:</u> -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 standard Tuition/Fees.</p> <p><u>-If 5th Year selected:</u> The student’s annual award amount will recalculate using the standard Tuition/Fees for the segment type.</p> <p><u>Results:</u> The update to the MCS award information will be available the following Monday.</p>
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<p>15. Removing the 5th Year and/or Teacher Credential Program (TCP) Flag</p>	<p>Annual</p>	<ul style="list-style-type: none"> • Select Correction radio button • Select “Remove TCP/5th Year” on Eligibility Change drop down field in the Annual Data section • Hit the Save button <p><i>NOTE:</i> CSAC will recalculate the student’s award amount at the annual level using the standard Tuition/Fees amount for the segment type.</p> <p><u>Results:</u> 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.</p>	<ul style="list-style-type: none"> • Field 41 (Eligibility Change) – Enter 9 for “Remove TCP/5th-Yr Program” • Field 42 (Transaction Type) – Enter C for “Correction” • Field 43 (Teacher Credential Program (TCP) / Fifth Year of 5-Year Program Flag) – Enter 2 for “No – TCP/5th-Yr” <p><i>NOTE:</i> CSAC will recalculate the student’s award amount at the annual level using the standard Tuition/Fees amount for the segment type.</p> <p><u>Results:</u> 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.</p>
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<p>16. Applying an Ineligible Status to a Term</p> <p><u>Ineligible term reasons consist of:</u></p> <ul style="list-style-type: none"> • Post Bacc • SAP • Other 	<p>Term</p>	<ul style="list-style-type: none"> • Select “Payment” radio button • At the Fall/Winter/Spring term level, select either “Post Bacc, SAP, or Other” from the Adj. Reason Code drop down menu • The Amount/Paid Verified field will automatically populate with a \$0 payment amount • Hit the Save button <p><u>Results:</u> The update to the MCS award information will be available the following Monday. The Term Award Amount will be reduced to zero. All other amounts related to the term will remain (Tuition/Fees, Federal Aid, Institutional Aid, and State Aid). The term will show as a reconciled payment along with the type of ineligible status applied. The status will display below the Adj. Reason Code field.</p> <p>The Adj. Reason Code field will continue to display the ineligible status code until the term is reinstated and a payment is applied.</p> <p><i>NOTE:</i> <i>If a reconciled payment exists, the payment will be reversed out from the term. The payment amount will also be reversed from the overall campus balance. The amount that was reversed can be viewed under the MCS Payment Activity Report.</i></p>	<ul style="list-style-type: none"> • Field 21/28/35 (Fall/Winter/Spring MCS Award Payment) – Enter a \$0 dollar amount • Field 22/29/36 (Fall/Winter/Spring Adjustment Reason Code) – Enter 1-Post Bacc, 2-SAP or 7-Other • Field 42 (Transaction Type) – Enter P for “Payment Information” <p><u>Results:</u> The update to the MCS award information will be available the following Monday. The Term Award Amount will be reduced to zero. All other amounts related to the term will remain (Tuition/Fees, Federal Aid, Institutional Aid, and State Aid). The term will show as a reconciled payment along with the type of ineligible status applied. The status will display below the Adj. Reason Code field.</p> <p>Fields 22/29/36 will continue to display the ineligible status code until the term is reinstated and a payment is applied.</p> <p><i>NOTE:</i> <i>If a reconciled payment exists, the payment will be reversed out from the term. The payment amount will also be reversed from the overall campus balance. The amount that was reversed can be viewed under the MCS Payment Activity Report.</i></p>
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<p>17. Reinstating an Ineligible Term</p> <p>-This function will remove the ineligible status of Post Bacc, SAP or Other</p>	<p>Term</p>	<ul style="list-style-type: none"> • Select “Correction” radio button • At the Fall/Winter/Spring term level, select “Fees” from the Adj. Reason Code drop down menu • Enter the campus tuition amount for the term in the Tuition/Fees field, even if the field displays an amount in the red bracket • Hit the Save button <p><i>NOTE:</i> Reinstating the term requires the campus to enter the Tuition/Fee amount. If the student has other aid related to the term, those amounts can also be entered during this time.</p> <ul style="list-style-type: none"> ▪ <i>Federal Aid, Institutional Aid and State Aid</i> <p><u>Results:</u> The update to the MCS award information will be available the following Monday. The term will be recalculated based on the Tuition/Fee and any other aid amounts entered. The term will continue to display as a reconciled payment.</p> <p>The ineligible status will continue to display below the Adj. Reason Code field until a payment is applied to the term.</p>	<ul style="list-style-type: none"> • Field 22/29/36 (Fall/Winter/Spring Adjustment Reason Code) – Enter 4 for “Fees” • Field 23/30/37 (Fall/Winter/Spring Tuition/Fee Amount) – Enter the Tuition/Fee amount for the term • Field 42 (Transaction Type) – Enter C for “Correction” <p><i>NOTE:</i> Reinstating the term requires the user to enter the Tuition/Fee amount. If the student has other aid related to the term, those amounts can also be entered during this time in the following fields:</p> <ul style="list-style-type: none"> ▪ <i>Field 24/31/38 (Fall/Winter/Spring Federal Aid Amount)</i> ▪ <i>Field 25/32/39 (Fall/Winter/Spring Institutional Aid Amount)</i> ▪ <i>Field 26/33/40 (Fall/Winter/Spring State Aid Amount); Exclude Cal Grant</i> <p><u>Results:</u> The update to the MCS award information will be available the following Monday. The term will be recalculated based on the Tuition/Fee and any other aid amounts entered. The term will continue to display as a reconciled payment.</p> <p>Fields 22/29/36 will continue to display the ineligible status code until a payment is applied to the term.</p>
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