

WebGrants Transfer Entitlement Processes Guide



California Student Aid Commission
Program Administration & Services Division
schoolservices@csac.ca.gov
(888) 294-0153

October 2007

Accessing WebGrants



WebGrants is the Commission's online school user interface to the Cal Grant and Chafee Grant programs. It allows inquiry functions to select and view your institution's Cal Grant and Chafee Grant recipients and allows the posting of payments and updating of student and institutional demographic information.

WebGrants special features include:

- Immediate, real-time access to view student or school-specific award and payment data for both current-year and prior-year transactions.
- Enter and send grant data, such as payment and enrollment status transactions
- Download all rosters and reports in print, data, or HTML file format
- Upload rosters, reports, and data

WebGrants is an Internet Secured Site as indicated by the "https" in the address. In-

formation is only available to authorized users. In order to access WebGrants, users must have access to the Internet through an Internet Service Provider (ISP) or Intranet link, and must have a compatible web browser such as Internet Explorer 5.5 or higher, Mozilla Firefox 1.4 or higher, or Netscape 6.2.3 or higher.

WebGrants information is generally accessible – 24 hours per day, 7 days per week. However, during weekly processing cycles, "Update" functions used to add or change system data may be suspended.

During these periods, update is affected but the system maintains the inquiry function and data upload and download capabilities. In addition to the weekend cycle, WebGrants also undergoes semi-monthly processing cycles. A production schedule of these "down" times is posted on WebGrants.

Initial access to WebGrants is set up by the Commission's Technology Help Desk. After that, however, each school selects a WebGrants Sys-

CSAC Fact:

The California Student Aid Commission was established in 1955 as the California State Scholarship Commission to oversee the administration of the California State Scholarship Program, the forerunner of today's Cal Grant program.



tem Administrator to grant employee access to the system. To obtain WebGrants System Administrator access for your institution, complete the an Information Security and Confidentiality Agreement and a System Administrator's Access Request form.

Mail the completed forms to:

California Student Aid Commission
Information Technology Services Division
Attn: CSAC HELPDESK
PO Box 419026
Rancho Cordova, CA 95741-9026

Once your forms are received, the Helpdesk will set up your WebGrants account and contact you by E-mail with your ID. Upon receiving your ID, call the Helpdesk at (888) 294-0148 to complete the WebGrants set-up and

receive your temporary password. The Helpdesk will provide you with preliminary information on accessing and using the WebGrants system.

Normally, accounts are established within 24 hours of receiving completed forms. When your school's system administrator is assigned and has access, that person or persons can grant access to additional school employees as needed.

For problems or questions you may have, contact the CSAC Technology Helpdesk at (888) 294-0148 or csachelpdesk@csac.ca.gov.

In addition, our WebGrants support team can provide you with any technical, procedural, and policy support you may require. You may direct your questions to schoolsupport@csac.ca.gov.

WebGrants



Transfer Entitlement Verification Requirements

Assembly Bill AB 840 was signed by the Governor June 26, 2006. The bill required the Commission, starting with the 2006-07 award year, to issue Transfer Entitlement award offers only on a preliminary basis. As required by the legislation, each student selected for an award is required to sign a statement, under penalty of perjury, that he or she meets the requirements for the award. In particular, the student will affirm that he or she did graduate from a California high school or did complete a high school graduation equivalency, such as the GED or California High School Proficiency Exam, on or after July 1, 2000. Also, the student must have met California residency requirements at the time of their high school graduation or the equivalent.

Students who completed their high school graduation requirements outside of California would be eligible only if the reason they were required to be out of state at the time of the student's graduation was that the student or the student's parent or guardian were California residents and were required to reside outside of California due to military orders.

The bill also requires the Commission to randomly select a minimum of 10% of the new and renewal Transfer Entitlement awards for institutional verification of the student's eligibility. School verification will be required prior to the disbursement of funds and the Commission will have to seek repayment of any and all funds found to be improperly disbursed under the program.

Transfer Entitlement Processing and the G6 Form

Students selected into the Transfer Entitlement (E2) program are mailed a Transfer Entitlement Cal Grant Certification Form (G6) to certify to their eligibility for Transfer Entitlement participation. The form is also made available to schools with an Operations Memo each year. All Commission Operation Memos, Special Alerts and Policy Bulletins are available on the Help Menu in WebGrants. E2 students should read the G6 instructions carefully and then, as quickly as possible, complete, sign, date and mail the completed form to the address listed on the back of the form.

Students who are not E2 eligible should return the form within 30 days of their initial E2 eligibility letter to be considered for a Cal Grant Competitive award. After the 30 days, Competitive award consideration may not be possible. Faxed copies of the form will not be accepted. The student should read the form instructions and call the Commission's Student Support Services Branch at (888) 224-7268 with any questions.

Transfer Entitlement Verification Requirements

Schools must verify the following to meet their 10% verification requirement:

- 1) the student graduated from a California high school or equivalent (GED, Proficiency Exam) during or after the 2000-01 academic year;
- 2) the student was a California resident at the time of high school graduation or equivalent;
- 3) the student does not satisfy criteria 1 above because he or she graduated from a high school outside of California yet was a California resident, or his or her parents were residents, and was outside of California due solely to military orders that required the student to be out of the state at the time of high school graduation.

In order to receive further consideration for a Cal Grant award, you must complete all questions, sign and return this form to CSAC within 30 days of the date of your letter. If you are not eligible for a Cal Grant Transfer Entitlement award, you may be considered for a Competitive Cal Grant award, but only if you complete and return this form within 30 days. Faxed copies of the completed form will not be accepted. DO NOT LEAVE ANY QUESTION BLANK.

Instructions for filling out the Student Certification section:

When completing this form, please print clearly using black ink only.

Answer each question by filling in the response or checking the appropriate box as it applies to your situation.

1. Print your name as it appears on your Social Security card. Enter your first name, middle initial and last name. Print your Social Security number as it appears on your Social Security card or your CSAC ID as it appears on your CSAC notification letter.
2. Print the month and year you graduated from high school or achieved the equivalent by passing the GED or California High School Proficiency Examination. For example, June 2005.
3. Mark this box **only if** you were a California resident at the time of high school graduation but graduated from a high school outside of California due to you or your parent or guardian's military orders from the United States Armed Forces. If you graduated from a California high school, leave this box empty.
4. Print the name of the high school from which you graduated. If you completed high school by passing the GED or the California High School Proficiency Examination, please write in "GED" or "CHSPE."
5. If you graduated high school, list the city and state of the high school.
6. Print the date you became a California resident. If you have resided in California since your birth, please put your date of birth.
7. Print the name of the college you attended for Spring 2007. For example, College of the Redwoods.
8. Print the name of the school where you intend to enroll for Fall 2007. For example, CSU Humboldt.

Signature: By signing this form, you certify that you have read the instructions and the information you provided is correct. It is illegal to report false or misleading information on this form and in doing so, may result in any Cal Grant award being revoked and CSAC potentially seeking repayment of any grant amount that is obtained based on the submission of inaccurate information.

For more information on filling out this form or for questions on Cal Grant eligibility, contact CSAC at (888) 224-7268 or by email at studentsupport@csac.ca.gov.

Faxed copies of this completed form will not be accepted.

Mail completed forms to:

California Student Aid Commission
Cal Grant Operations Branch
PO Box 419028
Rancho Cordova, CA 95741-9028



Identifying Students on the WebGrants Roster

Initially, students selected for Transfer Entitlement participation will be placed on a school's WebGrants roster in an "on-hold" status. The WebGrants roster will display the following statement:

"This Entitlement Transfer Record is on-hold awaiting the return of the G6 Transfer Entitlement Cal Grant Certification Form. Once the information is recorded, the record will be released for payment by Commission staff"

The students whose record reflects the message above, have been sent a G6 form which has not yet been returned or a form has been received and is awaiting processing by the Commission. Students who are not E2 eligible must return the form within 30 days of their initial E2 eligibility letter to be considered for a Cal Grant Competitive award.

Once a G6 is processed, the WebGrants roster will display the following statement:

"This Entitlement Transfer recipient is on-hold awaiting verification required by AB 840. Once the information is verified, the record will be released for payment."

WebGrants Roster Page:

The screenshot displays the WebGrants Roster Page for two students: BELTRAN and BENED. The browser window shows the URL: https://webgrants.csac.ca.gov/Roster/Roster_Display.asp?ID=6028&mode=navigate&action=navigate&at=Microsoft Internet Explorer p.

Student: BELTRAN (Record: 26)

SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Renewal	EL Code	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
			E2	2	D	N	4	16941	2914	100.00%	100.00%	ELIGIBLE(1)
Custom Codes 1 2 3 4 5 This Entitlement Transfer record is on-hold awaiting the return of the (G6) Transfer Entitlement Cal Grant Certification form. Once the information is verified the record will be released for payment by Commission staff.												
Education Level (EL) Verification			Reported EL 4		Verified EL <input type="text"/>		Status 2 -- Not yet paid, Verification Required					
Fall Term												
Adj Reason Codes Pay Status Codes												
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
Totals		\$2,520	\$1,260				14027					
A - On Hold	T/F	\$2,520	\$1,260						GRT			

Student: BENED (Record: 27)

SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Renewal	EL Code	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
			E2	2	I	N	3	16941	0	200.00%	100.00%	ELIGIBLE(1)
Custom Codes 1 2 3 4 5 This Entitlement Transfer record is on-hold awaiting verification required by AB840. Once the information is verified the record will be released for payment.												
Entitlement Transfer Verification			E2 Verification Status V -- Verification Required									
Education Level (EL) Verification			Reported EL 3		Verified EL <input type="text"/>		Status 2 -- Not yet paid, Verification Required					
Fall Term												
Adj Reason Codes Pay Status Codes Delete Txn												
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Adj Need	Rec Type			
Totals		\$4,071	\$2,036				16941					
B	T/F	\$2,520	\$1,260						GRT			
B	ACSS	\$1,551	\$776						GRT			

The WebGrants roster will have a drop down box for each E2 record for which we have received a G6. This allows the school to certify that the student's high school graduation requirement, within the required time frame has been confirmed.

The dropdown box will offer two selections:

P – Verified As Eligible

N – Verified As Not Eligible

Students who are verified as not eligible for Transfer Entitlement program benefits will be moved to the ineligible section of the WebGrants roster. Those verified as eligible can simultaneously have their payment eligibility certified. Or, the school can wait to certify payment after the next weekly payment processing cycle.

Downloading the E2 Verification Report

To download a report of those students still requiring verification of their E2 program eligibility, go to the Report Download screen from the Data Transfer Menu in WebGrants. This report is a list of those students still requiring school verification. Each time the report is run, those students who have been certified by the school since the last report will fall off of the report.

Any students who have submitted the G6 form since the last time the report was run will be added to the report. Therefore, it is important to check the report on a regular basis. Even though you may have previously verified all persons on the report, new students may be added.

E2 Verification Report on the Report Download Page

Report Download

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

School ID = Acad Year = 2006-2007 Month = All

Report = E2 Verification Media Type = All **GO!**

Chafee Status Roster By School
E2 Verification
EL Verification Accept/Reject
EL Verification Upload Summary
Education Level Verification
GPA Summary
Grant Roster
Grant Roster Upload Summary
Monthly Payment Activity
Other
Registered Domestic Partners

VeriSign Secured
Privacy Policy

Printing out E2 Rosters

Any roster formats saved under the user's profile can be produced in an 8 1/2" by 11" format for printing.

To print out a paper copy of any WebGrants Roster, go to the Print Roster screen from the Roster/Reconciliation main page. Select the correct year and roster format desired and hit the "GO" button. The roster can be viewed or saved by the user.

On the print roster, students whose E2 awards are still on hold will display one of the following messages:

"This Entitlement Transfer Record is on-hold awaiting the return of the G6 Transfer Entitlement Cal Grant Certification Form. Once the information is recorded, the record will be released for payment by Commission staff"

"This Entitlement Transfer recipient is on-hold awaiting verification required by AB 840. Once the information is verified, the record will be released for payment."

Students who have been verified as eligible by the school will not display any messages and will be in a payable status. Students who were verified an ineligible will appear only in the ineligible section of the roster.

Printable Roster Showing E2 Comments

https://webgrants.csac.ca.gov/download/SA08KD647185996_printfile.txt - Microsoft Internet Explorer provided by CSAC

Name	SSN	DOB	Grant ID	Cycle ID	Hous Code	Dep Stat	New EL Ren Cde	CSAC Budget	EFC	Rem Elig	Fcst Elig	Roster Section																																				
BELTRAN,				E2	2	D	N 4	16941	2914	100	100	Eligible																																				
Custom Codes: 1- 2- 3- 4- 5- EL Status Code: 2 -- Not yet paid, Verification required This Entitlement Transfer record is on-hold awaiting the return of the (G6) Transfer Entitlement Cal Grant Certification form. Once the information is verified the record will be released for payment by Commission staff. -----Award/Need----- -----Fall Term----- <table border="1"> <thead> <tr> <th>PG</th> <th>Awd Type</th> <th>Ann Awd</th> <th>Ann Need</th> <th>Adj Amt</th> <th>Term Amt</th> <th>Adj Amt</th> <th>Adj Rsn</th> <th>Pay Code</th> </tr> </thead> <tbody> <tr> <td></td> <td>TOTAL</td> <td>2520</td> <td>14027</td> <td>*****</td> <td>1260</td> <td>*****</td> <td>**</td> <td>—</td> </tr> <tr> <td>A-On Hold</td> <td>T/F</td> <td>2520</td> <td></td> <td></td> <td>1260</td> <td>—</td> <td>—</td> <td>—</td> </tr> </tbody> </table>													PG	Awd Type	Ann Awd	Ann Need	Adj Amt	Term Amt	Adj Amt	Adj Rsn	Pay Code		TOTAL	2520	14027	*****	1260	*****	**	—	A-On Hold	T/F	2520			1260	—	—	—									
PG	Awd Type	Ann Awd	Ann Need	Adj Amt	Term Amt	Adj Amt	Adj Rsn	Pay Code																																								
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<input type="checkbox"/> ACADEMIC YEAR 2006-2007 E2 PAGE NUMBER: 10																																																

Customizing a WebGrants Roster to Identify E2 Students

WebGrants has a “Customize Roster” feature which lets schools create their own customized roster views. These are accessed by following the “Customize Roster” link on the Roster Reconciliation Main page.

Up to 8 roster formats can be saved at any one time. The CSAC Standard Roster format is always available as it cannot be changed or deleted. Once created, a customized roster can be copied, edited and renamed. This is advantageous because opening the CSAC Standard Roster from the Customize Roster page is a very quick way to create a custom roster. The user would make any desired changes and rename the roster before saving.

Any roster format can be chosen as the “Preferred Format.” The Preferred Format will display automatically when “Display Roster” is selected from the Roster Main menu.

Transfer Entitlement participants on the roster are designated with an “E2” Cycle ID. A roster of all of a school’s E2 students would be created by checking the E2 Cycle ID box in the “Define Selection Criteria” area. Checking only that box would display Transfer Entitlement students with potential Cal Grant eligibility, including those awarded in prior years. The “New” box would also have to be checked to then select only newly awarded E2 students.

Optional E2 Selection Categories

There are four different E2 selection categories available on the Customize Roster Page. These are:

- **Waiting for G6 return**
The Commission has not processed a G6 form for the student
- **Requires Verification by the school**
A G6 has been processed and now the school must verify
- **School Verified Eligible**
The school has verified the student meets E2 program requirements
- **School Verified Ineligible**
The school reports that the student does not meet E2 program requirements

Please note these selection categories in the customize roster view on the following page. When creating a customized roster, the desired box can be checked to create a roster with those selection parameters. The roster should be named something that allows easy identification when you wish to view the roster such as “Verification Required.” Each custom roster is created only for an individual user. Other users would have to create their own custom rosters since custom rosters cannot be shared.

For more information on customizing rosters in WebGrants, please refer to the Roster/Reconciliation Screens user guide on the WebGrants help page.

Define Selection Criteria View on the Customize Roster Pages

Define Selection Criteria

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

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

E2 Identification on the Roster Data File

The WebGrants roster file layout has been modified slightly to indicate those students for whom school verification is required. The 8 character length “filler” field, in position 67-74, that is between the Program Code field and the Housing Code field on the WebGrants roster file layout now may contain a “V” code to indicate that school verification of the student high school graduation status is required. A “*” indicates that a G6 has not yet been processed for a Transfer Entitlement student. No entry in this field indicates either that the student is not a transfer entitlement participant or that the school has already verified eligibility for a Transfer Entitlement participant.

This field consists of several data codes that consist of:

- The Transfer Entitlement status “on-hold” flag, either blank, * or V
- A “-” used as a separator
- The student’s two character award selection cycle ID either E1, E2, C1 or C2.
- The dependency code as displayed on the WebGrants roster (D or I)
- The new or renewal status code (N or R)
- The EL level showing for that year on the WebGrants roster (1, 2, 3 or 4)
- A blank character

For example, the entry *-E2DN3 means:

- * G6 form not yet processed
- (E2) Transfer Entitlement participant
- (D) Dependent student on WebGrants roster
- (N) New for that year
- (3) EL level (grade level) 3 on WebGrants roster

The V-E2IN4 entry would mean:

- (V) G6 form processed, awaiting school verification
- (E2) Transfer Entitlement participant
- (I) Independent student on the WebGrants roster
- (N) New for that year
- (4) EL level (grade level) 4 on the WebGrants roster

Those entries without a leading * or V are either students who are not Transfer Entitlement participants or are E2 participants whose school has already verified their Transfer Entitlement eligibility.

Text Editor View of the WebGrants Roster Data File

 https://webgrants.csac.ca.gov/download/SA0BKDU0EwQktENjQ3MTg10Tk2MTAxMTIwMDYxODIzMCAg_printfile - Microsoft

```
GPHD09 00115100SCSU SAN DIEGO STATE UNIVERSITY 200610070607
GPPR 1 E07032608524008684 ABAN JOHN E19870212B -E1DN1 2169410098615955*****
GPPR 1 E07099905622005626 ABBAS HERDON 19840923B *-E2DR3 3000000000000000
GPPR 1 E07032256622004808 ABDEL AJDI M19870721B -E1DN1 3116310000011631*****
GPPR 1 E07019366156002931 ABELL MALEA R19871008A -E1DN1 2169410981607125*****
GPPR 1 E07048489520006643 ABEM BARTON A19830804B V-E2DR4 2000000000000000
GPPR 1 E07024575511001459 ABELIDO HAMILTON M19870608A *-E2DN3 2169410110115840*****
GPPR 1 E06080653515009219 BELL ANGEL M19881122A -E1DN1 2169410351413427*****
GPPR 1 E06048864555005553 BEROT CATHY A19841130A -E1DR4 3000000000012683
GPPR 1 E06036943573006925 BHAT SPINTAN M19830113A -E1DR4 1000000000012088
GPPR 1 E06099170504007011 BULIMER JOSEPH O19860610B -E1DR3 1000000000013942
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Please note location of “*” and “V” in the data file. For further information on the E2 identification process, or for help with WebGrants, please call School Support Services at (888) 294-0153.