



STUDENT INFORMATION

WebGrants User Guide

Updated: DECEMBER 4, 2004

STUDENT INFO MAIN PAGE

Purpose

The Student Information area of WebGrants is the portal for viewing all available information about a particular Cal Grant recipient or applicant.

Page Elements

1. Student Info Navigation Bar

This shortcut navigation bar contains links to all pages within the Student Information area of WebGrants.

2. **Award Summary** Link to the Award Summary Page where users can view general Cal Grant award information (see page 3).

3. **Award Detail** Link to the Award Detail Page where users can view more detailed information about a student's Cal Grant award (see page 4).

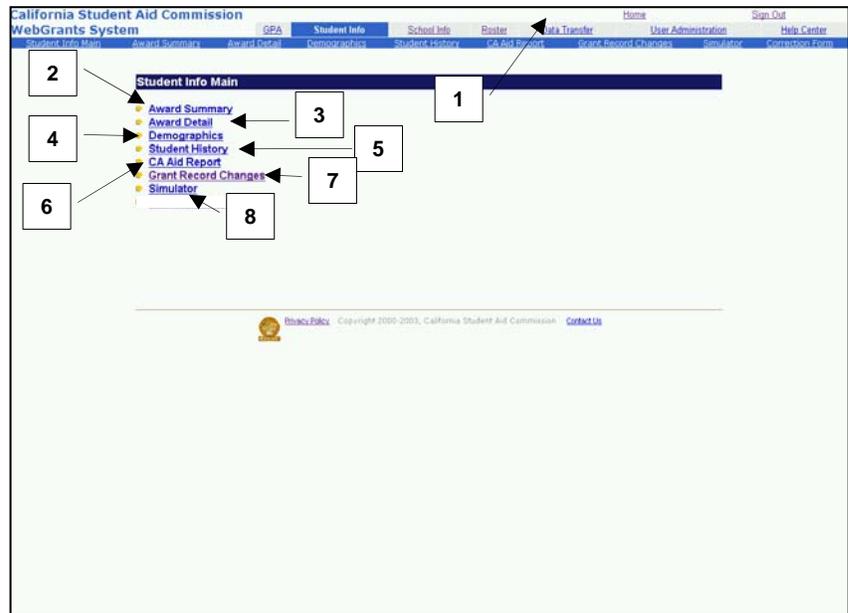
4. **Demographics** Link to the Student Demographics Page where users can view and modify a Cal Grant recipients demographic information (see page 5).

5. **Student History** Link to the Student History Page where users can view the payment history for a particular student over the entire life of the grant to date (see page 6).

6. **CA Aid Report** Link to the California Aid Report Page where users can view a version of the award notification sent to a new Cal Grant recipient (see page 7).

7. **Grant Record Changes** Link to the Grant Record Changes Page where users can complete an online version of the Grant Record Change form for Schools (G-21 form) and submit to CSAC for approval. (see page 9).

8. **Simulator** Link to the School Simulator Page where users can enter data to simulate a student's transfer to another school and view the resulting Cal Grant award change. (see page 11).



Access

This page can be accessed by clicking on the [Student Info](#) link in the Options box on the WebGrants Home Page or by clicking on the [Student Info](#) link in the WebGrants Navigation Bar located in the upper right of all WebGrants pages.

STUDENT INFO MAIN PAGE

Page Functions

Navigate to all other pages within the Student Information area of WebGrants

The main page of each WebGrants area contains links to the pages included in that area. In addition, each area within WebGrants has its own submenu navigation bar that is located in the blue bar directly under the WebGrants Navigation Bar. This submenu navigation bar allows the user to move from page to page within the same area of WebGrants without continually going through the Main Page of each area.

Click the [Award Summary](#) link to view the Award Summary Page (see page 3).

OR

Click the [Award Detail](#) link to view the Award Detail Page (see page 4).

OR

Click the [Demographics](#) link to view the Student Demographics Page (see page 5).

OR

Click the [Student History](#) link to view the Student History Page (see page 6).

OR

Click the [CA Aid Report](#) link to view the CA Report Page (see page 7).

OR

Click the [Grant Record Changes](#) link to view the Grant Record Changes Page (see page 9).

OR

Click the [Simulator](#) link to view the School Simulator Page (see page 11).

OR

Click a link on the Student Info navigation bar to view the indicated page.

Award Summary Page

Purpose

The Award Summary Page allows users to view general Cal Grant award information on a Cal Grant recipient or applicant. This Page replaces the IGLS screen of the Legacy WebGrants system.

Page Elements

- 1. Record Display Criteria Bar** Users may enter either the student's social security number or CSAC ID to access the student's record.
- 2. Demographic Information** General demographic information for the student record displayed.
- 3. Record Display Table** The total list of Cal Grant awards the student has applied for. Clicking on a column heading will sort the list (descending or ascending) by the values in that column. Placing the cursor over a value in one of the columns will display a description of that value. For detailed descriptions of the fields listed here, see Appendix A-WebGrants Field Names and Descriptions.

California Student Aid Commission
WebGrants System

Student Award Summary

All data columns can be sorted either ascending or descending order.
Click on the blue column headings to change the sort order of the data.
Additional information can be viewed by moving your mouse over the data fields.

Search =

MJUL N BOONG
8902 ROTELLA DR.
SACRAMENTO, CA 95824
Home Phone: (555) 372-5456
Work Phone: (555) 000-0000

Grant ID: C01049350
State of Residence: CA
Date of Birth: 02/08/1981
Citizenship: ELIGIBLE NON-CITIZEN

Academic Year	Program	Application Status	Award Status	Award Date	Award Amount	Award ID	Cycle	School ID	E/R	C/R	CC	Reserve
2002-2003	B	F-E CMPL	FIN ELIG	09/11/2002	\$1,581	C1		00123300				
2001-2002	A	F-E CMPL	COMM WITH	11/16/2001	\$0	C1		00123300	99,88			Y
2001-2002	B	F-E CMPL	ALTD ACC	05/09/2001	\$1,551	C1		00123300				Y
2001-2002	C	F-E CMPL	COMM WITH	11/16/2001	\$0	C1		00123300	74			Y
2000-2001	A	F-E CMPL	DENY LOW	07/07/2000	\$3,429			00123300				Y
2000-2001	B	F-E CMPL	COMM WITH	07/07/2000	\$1,548			00123300	10,10			Y
2000-2001	C	F-E CMPL	F/E DISQ	07/07/2000	\$0			00123300	74			Y
1999-2000	A	F-E CMPL	DENY LOW	07/15/1999	\$1,420			00115000				N
1999-2000	B	F-E CMPL	F/E DISQ	07/15/1999	\$0			00115000	10			N
1999-2000	C	F-E CMPL	F/E DISQ	07/15/1999	\$0			00115000	11,74			N

Access

The Award Summary Page can be accessed by clicking the [Award Summary](#) link on the Student Information Main Page (see page 2) or by clicking the [Award Summary](#) link on the blue submenu navigation bar.

Page Functions

View the Award Summary of a Particular Cal Grant Recipient or Applicant

1. Type the Social Security number or CSAC ID of the student for which to display a record in the **Search** field
2. Click the <Go!> button

™The indicated student's award summary will be displayed in the **Record Display Table**

Purpose

The Award Details Page allows users to view more specific Cal Grant award information on a Cal Grant recipient or applicant. This page replaces the IGAI and IGRC screens of the Legacy WebGrants system.

Page Elements

1. Record Display Criteria Bar

The fields on this blue bar allow users to select which record to display. Fields include Social Security number (SSN) or CSAC ID, and academic year (either the current award year or the prior award year).

2. Student Specific Information

The data listed here is specific to the student whose record is displayed

3. New/Renewal

Indicates if the student whose record is displayed is considered a "New" or "Renewal" recipient. This field is tied to the academic year. If a student applied for a Cal Grant, and did not receive an award, the field will still indicate "New".

4. Record Display Table

The data listed here is specific to the type of Cal Grant (identified in the column heading) that a student was considered for and/or received. For detailed descriptions of the fields listed here, see Appendix A- WebGrants Field Names and Descriptions.

RENEWAL	
School ID/Program Code	00123300 00
Segment	CC
Semester/Quarter	SEMESTER
Attendance Status	
Housing Code	3 - WITH PARENTS
Remaining Program Eligibility	200.00%
Award Status	FINANCIALLY ELIGIBLE

Budget Amount/Duration	/ /
Expected Family Contribution (EFC)	
Other Aid	
Veterans Benefits	
Unmet Need	
Total Award Amount	\$1,250
Tuition/Fees	\$0
Access/Books&Supplies	\$1,500

Access

The Award Details Page can be accessed by clicking the [Award Detail](#) link on the Student Information Main Page (see page 2) or by clicking the [Award Detail](#) link on the blue submenu navigation bar.

Page Functions

View the Award Details of a Particular Cal Grant Recipient or Applicant

1. Type the Social Security number or CSAC ID of the student for which to display a record in the **Search** field
2. Select the academic year of the student for which to display a record in the **Academic Year** drop down list
3. Click the <Go!> button

™The selected student's award details will populate the **Record Display Table**

Student Demographics Page

Purpose

The Student Demographics Page allows users to view and modify demographic information for a Cal Grant recipient.

Page Elements

1. **Search** Users may enter either the student's social security number or CSAC ID to access the student's record.
2. **Demographic Information** Current demographic information for the student record displayed. The only fields here that are not available for schools to update are High School Graduation Date and Date of Birth.
3. **Source of Change** WebGrants User ID of the individual who submitted the last demographic change request.
4. **<Submit Changes> Button** After modifying any fields on the page, this button must be clicked to change the data on CSAC's Grant Delivery System.
5. **<Reset> Button** Click here to remove any modifications made to any fields on the page, This button will only work if the <Submit Changes> button has not yet been clicked.
6. **Demographics History** Displays historical demographic information for student displayed including date the change was made and the ID of the user who keyed the change.

California Student Aid Commission
WebGrants System

Student Demographics

Change to a student's address, phone numbers and email address may be made on this Web page.
Changes to Student Grant Record information must be approved by CSAC prior to final acceptance. Select **Grant Record Changes** from the menu bar to submit these changes.
Changes to a student's name, SSN, date of birth or high school graduation date require supporting documentation. [Click here](#) to print a form and instructions for requesting such changes.

Search = SSN GO

MAYRAN S ANCHEZ
Address 1: 132 COGSWELL RD Home Phone: (955) 955-8718
Address 2: Work Phone: () () () () () ()
City: SOUTH E-Mail:
State: CA Zip: 91733 HS Grad Date: 06/01/2002
Date of Birth: 11/02/1994
Source of Change: CSAC

Submit Changes Reset

Previous Data	Source of Change	Change Date
MAYRAN S ANCHEZ 132 COGSWELL RD SOUTH, CA 91733 955965-8718	CSAC	23-JUN-03

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Access

The Student Demographic Page can be accessed by clicking the [Demographics](#) link on the Student Information Main Page (see page 1) or by clicking the [Demographics](#) link on the blue submenu navigation bar.

Page Functions

Update the Current Demographic Information for a Cal Grant Recipient

1. Type the Social Security number or CSAC ID of the student for which to display a record in the **Search** field
2. Click the <Go!> button
™ The selected student's current demographic information will populate the page
3. Overwrite the new information into the appropriate field
4. Click the <Submit Changes> button
™ The message "Transaction Saved" will appear in red at the top of the page.

Purpose

The Student History Page is a read only screen that displays all reconciled payments for a single student over the life of the Cal Grant through the indicated academic year.

Page Elements

1. Record Display Criteria Bar

The fields on this blue bar allow users to select which payment history to display. Input fields include the student social security number (SSN) or CSAC ID and academic year through which to view payment transaction information.

2. Student Information

Displays general information about the student's Cal Grant award and remaining program eligibility.

3. Payment History Display

Displays each reconciled payment transaction processed through the academic year specified in the User Input Bar. Clicking on a column heading will sort the list (descending or ascending) by the values in that column. For detailed descriptions of the fields listed here, see Appendix A- WebGrants Field Names and Descriptions.

Student History

- Academic year selection will display all payments prior to and including the year selected.
- Data can be sorted by Academic Year, Term or Date.
- Click on the blue column headings to change the sort order of the data.

Search = Acad Year =

Name	SSN	Grant Id	Cycle Id	Prog Code	Awd Status	Rem Elig
MUL H DOONG	001233045	C01049350	C1	B	25	200
TCP/5YR						

PG	AW	School Id	Acad Yr	Term	SG	Pay Amt	Pay Stat	Elig Used	Adj Amt	Adj Rtn	Date	Rec Type
B	S	00807300	2002	FL			PD				03/12/2003	PTX
B	S	00123300	2002	FL		776	PD				03/10/2003	PTX
B	S	00123300	2002	SP		775	PD				03/11/2003	PTX
B	S	00123300	2001	FL		776	RP	50.00			12/06/2001	PAY
B	S	00123300	2001	SP			RA	50.00	775	AF	06/06/2002	PAV

Access

The Student History Page can be accessed by clicking the [View History](#) link on the Display Roster Page that appears to the right of the student's name, or by clicking the [Student History](#) link on the Student Information Main Page.

Page Functions

Display a Student's Payment History

1. Type the student's social security number or CSAC ID into the **Search** field.
2. Select the academic year through which to display payment transactions
3. Click the <Go!> button

™The selected student's complete payment history will be displayed

California Aid Report Page

Purpose

The California Aid Report (CAR) Page allows users to view an electronic version of the award notification sent to new Cal Grant recipients. This page replaces the ICAR screen of the Legacy WebGrants system.

Page Elements

1. Record Display Criteria Bar

The fields on this blue bar allow users to select which record to be displayed. Users must select search criteria by selecting SSN (Social Security number), CSAC ID or Grant ID (grant ID number) from the **Search** field drop down list, and then typing the SSN, CSAC ID or Grant ID after the “=” sign. A single academic year must be selected as well (either the current award year or the prior award year).

2. Print Date

For students who have been issued more than one CAR during the same academic year, the multiple print dates for the CARs will be listed here. Clicking on one of the date links will display that CAR information on the page.

3. School Choice Table

The data listed here is specific to the school (identified in the first column) at which a student was considered for and/or awarded a Cal Grant. The Award Type column displays an award amount if the student was awarded a Cal Grant at the corresponding school, and a code number if the student was denied a Cal Grant for attendance at that school. For detailed descriptions of the fields listed here, see Appendix A- WebGrants Field Names and Descriptions.

Access

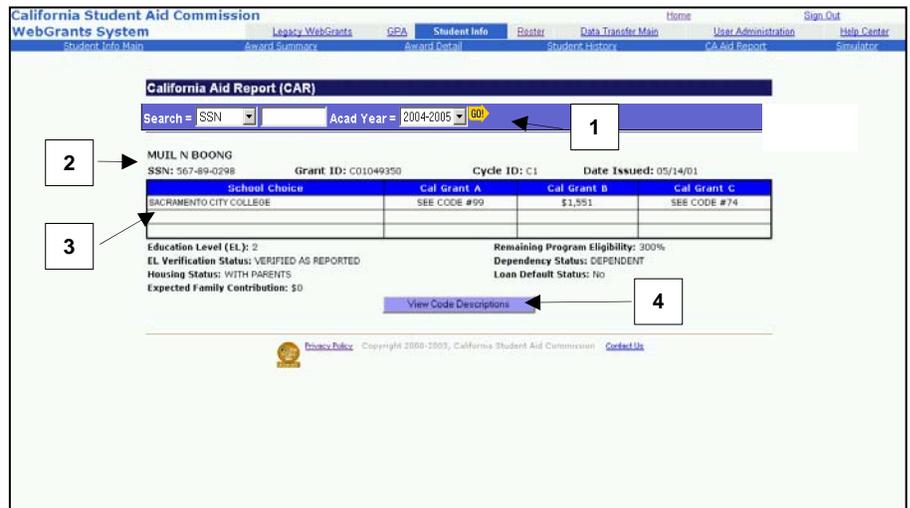
The California Aid Report Page can be accessed by clicking the [CA Aid Report](#) link on the Student Information Main Page (see page 2) or by clicking the [CA Award Report](#) link on the blue submenu navigation bar.

Page Functions

View the California Aid Report of a New Cal Grant Recipient

1. Select SSN, CSAC ID or Grant ID from the **Search** drop down list.
2. Type the SSN, CSAC ID or Grant ID in the “=” field.
3. Click the <Go!> button

™The selected student's California Aid Report will populate the page. NOTE: If the student was issued more than one CAR, issue dates of the multiple CARs will be displayed. Click on a particular issue date to view that information contained on that CAR.



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Grant Record Changes

Purpose

The Grant Record Change Form for Schools (Form G-21) is used by schools to update student information for both new and renewal Cal Grant recipients. The functions of the paper form have been integrated with WebGrants into an online form making it easier and faster for schools to submit changes online. School users with update rights may view or update information for students on their roster or who have pending school changes to their school. All the below listed page elements are available for update by schools for new Cal Grant recipients. Page Elements marked with an asterisk (*) are the only update fields available for renewal recipients.

Page Elements

1. **Record Display Criteria Bar** The fields on this blue bar allow users to select which record to be displayed. Users must select search criteria by typing a Social Security number or CSAC ID in the Search field and selecting a year from the Academic Year drop down list.

2. **Student Data** Basic student information that includes the Social Security Number, date of birth, grant ID, and whether the student is a New or Renewal Cal Grant recipient for the selected academic year.

3. **Education Level Verification*** Means by which schools can report a student's educational level (EL) when the school is unable to report information on the EL Verification Report.

4. **Student Data Change Fields** Any information that the school is aware of *that may change a student's award status or amount* must be reported to the Commission here.

- **Dependency Status Override** Click the round button here if a financial aid administrator used professional judgment in compliance with federal regulations to change a student's dependency status.
- **Dependency Status** Click the appropriate round button if changing the student's dependency status. This **MUST** be the same dependency status used to award all aid.
- **Estimated Family Contribution (EFC) Formula Calculations**
 - **Automatic Zero** Check this button if the automatic zero federal methodology was used to calculate the EFC. Check this button if the dependent student's parents' or the independent student's adjusted gross income is less than or equal to the maximum amount of income that may be earned in order to claim the maximum earned income credit, and the parents of a dependent student or the independent student did not file and were not required to file Internal Revenue Service's Form 1040.
 - **EFC Simplified** Check this button if the simplified federal methodology was used to calculate EFC.
 - **Regular** Check this box if the regular federal methodology was used to calculate EFC.
- **Number of Family Members** List the number of family members
- **EFC** Enter the Expected Family Contribution. Do not include financial aid awards.

Grant Record Changes

- *Unmet Need** Provide the unmet need for the student for the full academic year. Unmet need should be calculated using information on the College Cost Estimates Sheet submitted to the California Student Aid Commission (Commission).
 - *Marital Status* Select a marital status from the drop down list for the student (if independent) or parent (if student is dependent).
 - *Total Income* Provide the total income, using data at your school consistent to establish the student's financial aid . Provide information for the student if independent, or parent if student is dependent.
 - *Adjusted Net Worth* Provide the adjusted net worth which includes all assets, consistent with the data used to establish the student's financial aid. Provide information for the student if independent, or parent if student is dependent.
 - *Reason** A brief explanation of the reasons for changes and professional judgment decisions must be provided in this space.
5. **<Submit to CSAC for Approval> Button** After modifying any fields on the page, this button must be clicked to save changes for review by CSAC prior to acceptance.
6. **<Reset> Button** Click here to remove any modifications made to any fields on the page, This button will only work if the <Submit Changes> button has not yet been clicked.

Access

The Grant Record Changes Page can be accessed by clicking the [Grant Record Changes](#) link on the Student Information Main Page (see page 2) or by clicking the [Grant Record Changes](#) link on the blue submenu navigation bar.

Page Functions

Report Data Changes for a New or Renewal Student

1. Type the student's social security number or CSAC ID into the **Search** field.
2. Select an academic year.
2. Click the <Go!> button
 - ™ The selected student's information will populate the top of the page.
3. Complete the change form according to the field descriptions above.
4. Click the <Submit Changes> button
 - ™ A pop-up message will appear notifying the user that changes have been submitted and pending changes must be accepted by CSAC before GDS will be updated. Grant Record Changes must be submitted to CSAC for review and approval. If the changes are accepted, they will be manually entered by CSAC.
 - ™ If a pending transaction exists, the screen will be displayed and the temporary information will be displayed. No further update will be allowed however until the input is "Completed" by CSAC.

School Choice Simulator

Purpose

Before processing a school change for a new Cal Grant recipient, users can display a recipient's current award information on this page and calculate what the recipient's award status and amount would be at another specified school. The School Choice Simulator will only work for students with newly awarded Cal Grants.

Field Descriptions

1. Record Display Criteria Bar

Users may enter either the student's social security number or CSAC ID and the academic year for which to simulate a school change.

2. Current Award Information

Displays the current award information for the student whose SSN has been entered into the SSN field.

3. USDE Code

The USDE OPE code of the new school for which the award is being simulated.

4. Housing Code

The anticipated Housing code of the student if he/she was to attend the simulation school.

- 1 – student would be living on-campus if they were to attend the simulation school
- 2 – student would be living off-campus if they were to attend the simulation school
- 3 – student would be living with parents if they were to attend the simulation school

5. Simulated Award Details

The displayed student's estimated Cal Grant award details based on the simulation criteria entered in the USDE Code field and the Housing Code field. For detailed descriptions of the fields listed here, see Appendix A- WebGrants Field Names and Descriptions.

6. <Run School Choice Simulator> Button

Click to run the simulation

School Choice Simulator

- Simulates the grant amount changes affected by changing school and/or housing codes
- Works for Cal Grants A,B,C, and T
- Will display transfer or payment restrictions if associated with cycle id

1 → Search = SSN [] Acad Year = 2004-2005 [GO]

Current Award Information

Name: MOAN W BROWNING
 USED Code: 001233.00 SACRAMENTO CITY COLLEGE
 Housing Code: 2 OFF CAMPUS
 Annual Award Details: Cal Grant B Cycle ID: C1
 Total Annual Award Amount: \$1,551
 Tuition Fees: \$0
 Access Amount: \$1,551
 Books and Supplies: N/A
 Award Status: Auto Accept

2 ←

Simulated Award Information

3 → USED Code: 00753100 ACADEMY OF ART COLLEGE
 OR
 4 → Housing Code: ACADEMY OF ART COLLEGE - 00753100
 5 → Annual Award Details: Grant Program: Cal Grant A Cal Grant B Cal Grant C Cal Grant T
 Total Annual Award Amount: N/A \$11,259 N/A N/A
 Tuition Fees: N/A \$9,708 N/A N/A
 Access Amount: N/A \$1,551 N/A N/A
 Books and Supplies: N/A N/A N/A N/A
 Award Status: Auto Accept

6 → Run School Choice Simulator

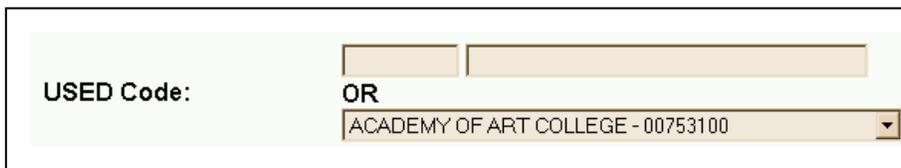
Access

The School Choice Simulator Page can be accessed by clicking the [Simulator](#) link on the Student Information Main Page or by clicking the [Simulator](#) link on the blue submenu navigation bar.

Page Functions

Estimate a Cal Grant recipient's award status at another school

1. Type the student's Social Security Number or CSAC ID into the **Search** field
2. Select the academic year for which to estimate an award from the Academic Year drop-down box
3. Click the <GO!> button
TM The student's current Cal Grant award information will be displayed under Current Award Information.
4. Type the USED OPE code of the school for which to view the estimate in the USDE code field **OR** Select a school from the USDE Code drop down box (see figure 12-1)
5. Select a housing code from the Housing Code drop down box.
6. Click the <Run School Choice Simulator> button.
TM The student's simulated award details based on the simulation criteria entered in the USDE Code field and the Housing Code field will appear under Annual Award Details.



The screenshot shows a form with the label "USED Code:" followed by two input fields. The first field is empty, and the second field is empty. Below these fields is the word "OR" and a dropdown menu. The dropdown menu is open, showing the text "ACADEMY OF ART COLLEGE - 00753100" and a small downward-pointing arrow on the right side.

Figure 12-1: Simulation School Selection