





Cal Grant Regional Training Middle Class Scholarship 2.0

Operation Memos and Special Alerts

Operations Memos



SPECIAL ALERT

Update from the California Student Aid Commission

March 18, 2022 **GSA 2022-18**

TO: UC and CSU Financial Aid Administrators

FROM: Tae Kang *Tae Kang*
Deputy Director, Program Administration & Services Division

SUBJECT: **Middle Class Scholarship Update**

This Special Alert from the California Student Aid Commission (Commission) provides an update on the Middle Class Scholarship (MCS) program.

2021-22 MCS Awards

- As communicated in [GOM 2021-21](#), 2021-22 MCS awards were made using a 35 maximum percent of Tuition/Fees instead of the standard 40 percent to avoid exceeding the maximum budget allocation of \$117 million.
- The Commission has identified remaining funding available and will be evaluating award increases for students enrolled and eligible to receive MCS Spring disbursements.
- Additional details will be communicated once a timeline is defined and award increases are confirmed.

2022-23 MCS Awards

- The 2021-22 state budget introduced significant changes to the [MCS program](#) starting with the 2022-23 academic year. The Governor's 2022-23 State Budget proposal introduced on January 10, 2022, included an ongoing \$515 million appropriation in the General Fund to support the new MCS program. The final MCS funding amount will be determined when the 2022-23 State Budget is approved sometime in June 2022.

[2023-24 Middle Class Scholarship Enrollment File Layout – GOM 2023-10](#)

[2022-23 MIDDLE CLASS SCHOLARSHIP UPDATE - GOM 2022-31](#)

[2022-23 Middle Class Scholarship Awards - GOM 2022-34](#)

[2022-23 Middle Class Scholarship – Initial Awards - GOM 2022-35](#)

[2022-23 Middle Class Scholarship Awards – Updated Timeline - GOM 2022-37](#)

[Middle Class Scholarship Policies and Guidelines – GOM 2022-40](#)

Special Alerts

[Middle Class Scholarship Update - GSA 2022-18](#)

[2022-23 Middle Class Scholarship Handbook - GSA 2023-05](#)



Student Eligibility:

- Complete and submit a FAFSA or CADAA by March 2
- Be attending a UC, CSU, or a participating CCC with a Baccalaureate program
- Not in default on a federal student loan
- Pursuing first undergraduate baccalaureate degree; or has completed a baccalaureate degree and is enrolled in a teacher credentialing program (TCP)
- Not incarcerated
- Be a California resident and a U.S. citizen or eligible noncitizen, or meet the eligibility requirements under AB 540 status
- Maintain Satisfactory Academic Progress
- Attending at least half -time
- Income within income/asset ceilings

MCS Renewal

- MCS can be renewed for up to four years of full -time attendance, if enough eligibility remains
 - additional 100 % eligibility for students in an approved TCP or institutionally prescribed 5-year undergraduate program

MCS Income and Asset Ceilings

CALIFORNIA STUDENT AID COMMISSION FOR MIDDLE CLASS SCHOLARSHIP APPLICANTS

2023-24 MIDDLE CLASS SCHOLARSHIP INCOME CEILINGS

Dependent students and Independent students with dependents other than a spouse	\$217,000
Independent students	
Single, no dependents	\$125,000
Married, no other dependents	\$144,000

2023-24 MIDDLE CLASS SCHOLARSHIP ASSET CEILINGS

Dependent students ¹	\$217,000
Independent students	\$104,000

¹ This ceiling also applies to independent students with dependents other than a spouse.



MCS 1.0 vs MCS 2.0

MCS 1.0

MCS 2.0

**Program
Funding**

\$117,000,000

\$632,000,000

63%

59%

**Offered
Awards**

**60,000
students**


**300,000
students**



MCS 2.0 Awarding Formula

MCS 2.0 Awarding Formula

Difference between Cost of Attendance and sum of the following:

- 1 Federal, state, institutional administered scholarships, grants and fee waivers
 - 2 Private scholarships that are in excess of the sum of items 3 and 4
 - 3 \$7,898 fixed amount reflecting an expected student contribution toward cost of attendance, from work earnings to other resources, to be applied to all students
 - 4 33% of parental contribution from Adjusted Available Income (AAI) for dependent students with annual Total Income (field 310) on ISIR greater than \$100,000
 - AAI is derived from the federal EFC Formula:
<https://fsapartners.ed.gov/sites/default/files/2021-08/2223EFCFormulaGuide.pdf>
-  Apply a “phase-in” factor to the result from calculation
Phase-in factor for 2022/23 = 26% (re-evaluated yearly, according to state budget and CSAC projections)



MCS Awarding Formula

MCS 1.0

Up to 40% tuition coverage based on the student's:

- Federal Aid
- State Aid
- Institutional Aid
- Income level

MCS 2.0

Calculation based on the difference of a student's

Cost of attendance

- Federal Aid
- State Aid
- Cal Grant (Does not need to be reported)
- Institutional Aid
- Student contribution of \$7,898

- 33% Parent contribution from adjusted available income for dependent students with annual income over \$100,000

- Private scholarships – the portion that exceeds the sum of the student and parent contribution categories.

The following table illustrates the MCS 2.0 awarding formula and data sources used to evaluate an award.

* Only applicable for dependent students with annual household income greater than \$100,000. The Parent Contribution is derived from the Adjusted Available Income.

** .49 or below rounds down and .50 and above rounds up.

Awarding Elements	Provided by	Source
Cost of Attendance	Campus	Enrollment file
<i>(less)</i> Aid Awarded		
Federal	Campus	Enrollment file
Institutional	Campus	Enrollment file
State	Campus	Enrollment file
Cal Grant	CSAC	WebGrants
<i>(less)</i> Student Contribution - \$7,898	CSAC	WebGrants
<i>(less)</i> 33% Parent Contribution *	CSAC	WebGrants
<i>(multiply by)</i> Phase in factor - 26%	CSAC	WebGrants
Raw MCS Award amount	CSAC	WebGrants
a) Divide by 6	CSAC	WebGrants
b) Round to nearest whole dollar **	CSAC	WebGrants
c) Multiply by 6	CSAC	WebGrants
Final MCS Award Amount	CSAC	WebGrants

MCS 2.0 Awards

MCS awards are calculated based on difference between the student's Cost of Attendance and the sum of the following amounts:

1. Other federal, state, institutionally administered scholarships, grants, and fee waivers awarded to the student;
 - a) as well as any private scholarships awarded to the student that are in excess of the sum of items 2 and 3.
2. \$7,898 dollars reflecting an expected student contribution toward cost of attendance from work earnings or other resources.
3. 33% of the parents' contribution from adjusted available income (abbreviated as AAI on federal/Cal-ISIR file), as determined using the federal Title IV methodology for dependent students with an annual household income greater than \$100,000 dollars

Cost of Attendance

Cost of attendance (COA) is a key driver of the MCS Award and the actual amount will be given to CSAC by the campus for each individual student.

COA will be based on housing/living situation

- On campus
- Off campus
- Living with parent or family member
- COA adjustments (childcare, transportation)

Student Contribution

Student Contribution will be **\$7,898** for all MCS applicants.

Represents the portion that a student might earn working minimum wage on a part time job.

Report on Enrollment File field 16 - Federal Awards:

- Pell Grant
- FSEOG
- Teach Grant
- BIA Grants
- Iraq Service Grant

Institutional Aid, fee waivers (part 1)

Report on Enrollment file field 17 - Institutional Grants, fee waivers and Private Scholarships:

- Institutional grants
- Athletic scholarships
- Fee waivers such as, but not limited to Alan Pattee, Foster Youth, COVID-19, Cal Vet Fee Waiver, Department of Rehabilitation, employee tuition assistance, etc.
- EOP
- Institutionally administered scholarships (including internship payments counted as EFA)
- Basic needs direct awards

Private Scholarships (part 2)- Enrollment file field 17

- **Private Scholarships – report the amount that is in excess of the \$7,898 student contribution and, if applicable:**
 - **33% of parents' contribution from adjusted available income for *dependent* students with annual household income over \$100,000**

Example:

- Institutional grants and fee waivers: \$2,000
- **Student contribution: \$7,898 (fixed)**
- **Private scholarships: \$9,000**
- (Dependent Student) Parent contribution from AAI (ISIR or Cal ISIR field 324): \$3,000

Subtract:

- **33% of Parent Contribution from AAI: $33\% \times \$3,000 = \990**
- **Private scholarships (excess): $\$9,000 - (\$7,898 + \$990) = \112 (excess)**

Report on enrollment file field 17: $\$2,000$ (institutional grants) + $\$112$ (excess) = $\$2,112$

Student Contribution

Report on Enrollment field 18 - State Awards:

- Chafee Grant
- Child Development Grant
- LEPD
- National Guard
- CA Volunteers -College Corps (Education Award if not used for repayment of student loans)
- Golden State Teachers Grant Program

Note: Cal Grants are considered when determining MCS 2.0 eligibility but are not reported by the school on the enrollment file. CSAC automatically adds Cal Grant awards into the MCS 2.0 awarding formula during the MCS/Cal Grant Sync job.

Financial Aid Sources that are not considered:

- **Federal Veterans Education Benefits excluded from EFA per USDE (Updated)**
- **CA Volunteers Living Allowance**
- **Internship or Assistantship (if treated as employment)**
- **Dream Act Service Incentive Grant (DSIG)**

MCS Awarding Formula: Example (INDEP STUDENT)

Difference between Cost of Attendance and sum of the following:

Awarding Element	Provided By	Source	Value	Operation	Result
COA	School	MCS Enrollment File	\$25,000	START	\$25,000
Federal, State, Institutional aid, fee waivers, excess private scholarships	School	MCS Enrollment File	\$9,551	Subtract	\$15,449
Student Contribution	CSAC	Applied to all students	\$7,898	Subtract	\$7,551
Parent Contribution from AAI	ISIR	Dep. Student w/ income > \$100k	\$0	Subtract	\$7,551
Phase-in Factor (adjusted annually)	CSAC	Applied to all students	0.26	Multiply	\$1,963
MCS Award	CSAC	MCS Roster	N/A	END	\$1,963

N/A

MCS Awarding Formula: Example (DPNDT STD > \$100K)

Difference between Cost of Attendance and sum of the following:

Awarding Element	Provided By	Source	Value	Operation	Result
COA	School	MCS Enrollment File	\$25,000	START	\$25,000
Federal, State, Institutional aid, fee waivers, excess private scholarships	School	MCS Enrollment File	\$2,656	Subtract	\$22,344
Student Contribution	CSAC	Applied to students	\$7,898	Subtract	\$14,446
33% Parent Contribution from AAI	ISIR	Dep. Student w/ income > \$100k	\$18,150	Subtract	-\$3,704
Phase-in Factor (adjusted annually)	CSAC	Applied to all students	0.26	Multiply	-\$964
MCS Award	CSAC	MCS Roster	N/A	END	\$0

AAI = \$55,000
 $\$55,000 \times 0.33$

MCS Awarding Formula Example CSU

MCS 1.0

CSU Max Award (40% T/F) - \$2,298

Pell Grant - \$6,895

Cal Grant - \$5,742

MCS AWARD = 0

MCS 2.0

COA - \$30,000

- Federal (Pell Grant) \$6,895
- Cal Grant \$5,742
- Institutional Aid \$2,000
- Student Contribution \$7,898

Total: \$22,535

$$\$30,000 - \$22,535 = \$7,465 \times .26 = \$1,940$$

MCS AWARD = \$1,940

MCS Awarding Formula Example UC

MCS 1.0

UC Max Award (40% T/F) - \$5,028

Pell Grant - \$6,895

Cal Grant - \$12,570

MCS AWARD = 0

MCS 2.0

COA - \$40,000

- Federal (Pell Grant) \$6,895

- Cal Grant \$12,570

- Institutional Aid \$2,000

- Student Contribution \$7,898

Total: \$29,363

$\$40,000 - \$29,363 = \$10,637 \times 0.26$ is \$2,766

MCS AWARD = \$2,766

MCS 2.0 Processing Timeline

July/August – Enrollment file submission window opened

- **Added Cost of Attendance to file layout**
- UC and CSU campuses uploaded enrollment files
- Student level data which included sources of financial aid

September - CSAC processed files and made initial award offers

- MCS campus rosters available in WebGrants
- Eligible students notified via email

September 2022 – June 2023

- Campuses pay on rosters & CSAC sends disbursements
- Weekly payments & corrections (end in Sept 2023)
- New awards end June 30



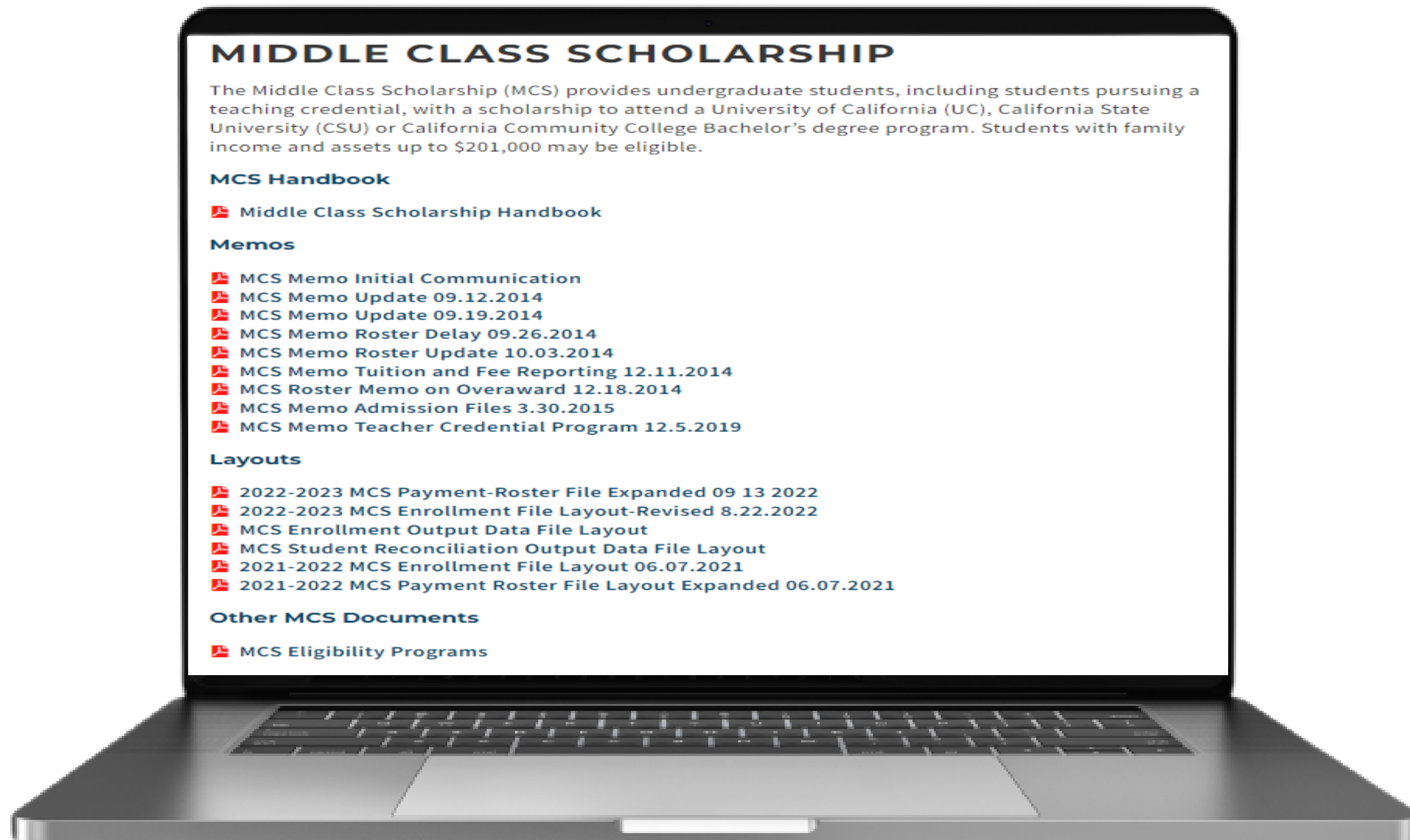
2022-23 MCS 2.0

- **147,514 of 268,169 (55%) MCS award offers also receive a Cal Grant award.** In the original MCS program, Cal Grant students would not have received an MCS award as Cal Grants cover the tuition charges at the UC and CSU
- University of California: 93,147 award offers with an average award amount of \$1,769
- California State University: 207,806 award offers with an average award amount of \$2,270
- Approximately 80% of UC and CSU students that received MCS consideration were offered an award
- 82% of the MCS award offers were made to applicants with incomes less than \$100,000, while the remaining 18% represented applicants between \$100,001 and \$201,000

Data from Feb 2023

Enrollment File Upload and Awarding

Memos and Layouts



Visit the CSAC website to access the Technical Documents for additional details and documents on MCS.

You will have access to:

- Memos
- Layouts
- Other MCS Documents

Enrollment File

This first step in the MCS award process requires schools to submit student enrollment data to CSAC to determine the MCS award amounts for eligible students.

There are two file layouts that UC's and CSU's must upload each year:

1. MCS Enrollment File
2. MCS Payment Roster File - uploaded after reporting student payments, for reimbursement by CSAC of disbursed MCS funds.

For participating CCC's with approved baccalaureate programs (CCBA), please contact CSAC's School Support Unit to request the current file layout as these programs have different specifications.

Enrollment File Layout Updates

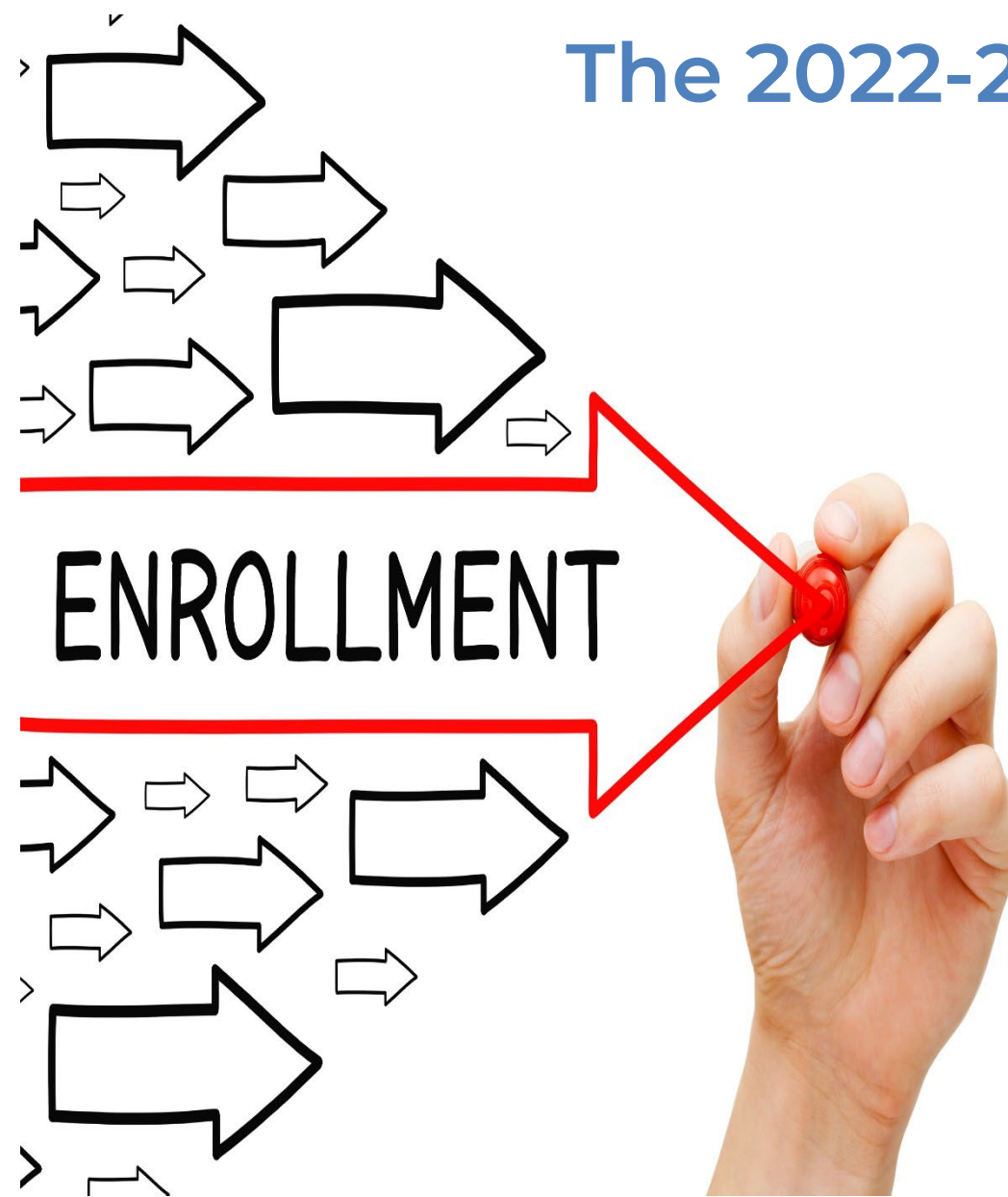
The MCS Enrollment File includes changes to the following fields: 9 and 20.

2023-2024 MCS ENROLLMENT FILE RECORD LAYOUT - FINAL 4/27/2023									
Field #	Start	End	Length	Field Name	Valid Content	Justify Signed	Enrollment	COMMENTS	
9	58	58	1	Student's Status	1 = New 2 = Continuing 3 = Winter Start 4 = Spring Start 5 = Incomplete Verification 6 = Fall Term Only 7 = Fall & Winter Terms Only	Left	X	If the value submitted is 3, then CSAC will only calculate the award for Winter and Spring terms (Quarter schools). If the value submitted is 4, then CSAC will only calculate the award for the Spring term. If the value submitted is 6, then CSAC will only calculate the award for the Fall term. If the value submitted is 7, then CSAC will only calculate the award for Fall and Winter terms (Quarter schools). (No blanks) NOTE: When reporting 3, 4, 6 or 7, the COA and all other aid must be calculated only for terms the student is attending.	

2023-2024 MCS ENROLLMENT FILE RECORD LAYOUT - FINAL 4/27/2023									
Field #	Start	End	Length	Field Name	Valid Content	Justify Signed	Enrollment	COMMENTS	
20	150	156	7	Student's Private Scholarships	0000000 to 9999999	Right	X	Value provided should include all Private Scholarships. (No blanks) NOTE: The Student's Private Scholarships should be based on the Student's Status from Field 9.	



Enrollment Records



The 2022-23 academic year runs from July 1, 2022 - June 30, 2023

- Enrollment Records can be added manually or via the file upload process, and are processed weekly throughout the academic year
- Enrollment Records must be submitted for all students who should be considered for MCS
- If a student who is initially withdrawn or financially ineligible becomes eligible, a new enrollment record must be submitted

Duplicate Enrollment Records

After initial enrollment files have been uploaded, subsequent/additional enrollment files may be submitted to:

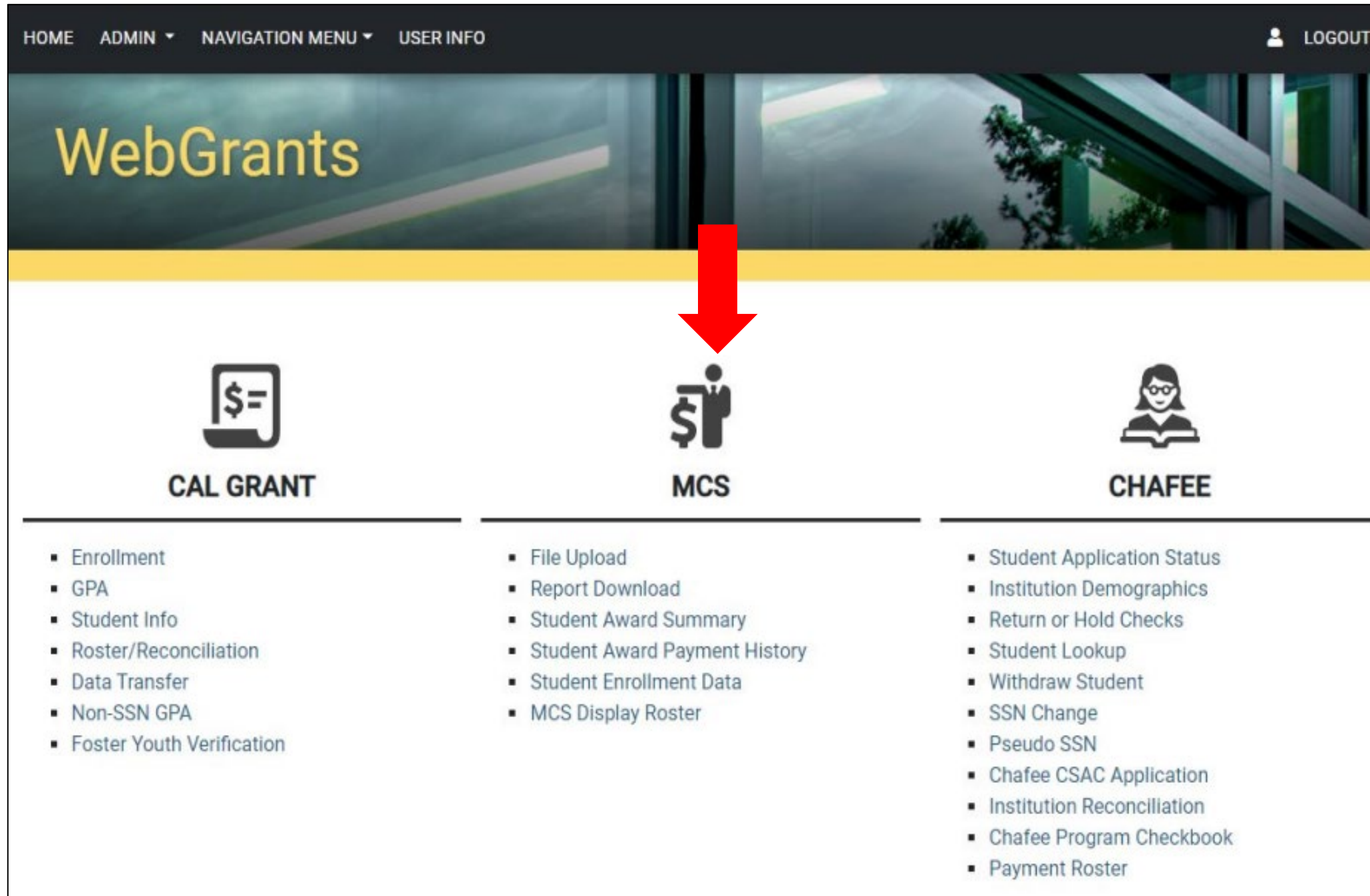
- Process any records not previously submitted; or
- To re-evaluate previously-determined ineligible students due to new information (COA, financial aid awards).

Campuses should **not** include enrollment records for the following:

- Eligible Applicants that have already been awarded an MCS 2.0 award
- *Corrections* to Eligible Applicants that are already awarded
 - To make corrections to already-awarded eligible applicants, utilize the **Payment and Correction File** (MCS Handbook pages 33-41).

Submitting duplicate enrollment records may prevent the processing of new enrollment records

WebGrants MCS Menu



HOME ADMIN ▾ NAVIGATION MENU ▾ USER INFO LOGOUT

WebGrants

CAL GRANT

- Enrollment
- GPA
- Student Info
- Roster/Reconciliation
- Data Transfer
- Non-SSN GPA
- Foster Youth Verification

MCS

- File Upload
- Report Download
- Student Award Summary
- Student Award Payment History
- Student Enrollment Data
- MCS Display Roster

CHAFEE

- Student Application Status
- Institution Demographics
- Return or Hold Checks
- Student Lookup
- Withdraw Student
- SSN Change
- Pseudo SSN
- Chafee CSAC Application
- Institution Reconciliation
- Chafee Program Checkbook
- Payment Roster

MCS Menus:

- File Upload
- Report Download
- Student Award Summary
- Student Award Payment History
- Student Enrollment Data
- MCS Display Roster

Student Enrollment Data Screen

After submitting an enrollment file, WebGrants allows users to view the enrollment information uploaded by your campus.

There are 3 Enrollment Statuses:

- **Blank** = Student was rejected from the Enrollment file, is not awarded, or is not on the roster
- **Pending** = Not processed through the award cycle:
 - The record does not match CSAC's data; or
 - Another campus uploaded an enrollment record for the student
- **Found in Roster** = Student is on campus MCS roster

Student Enrollment Screen

Student Enrollment Data ▼

UC IRVINE

SSN 123-45-6789 Academic Year 2022

First Name JASON MI A Last Name MASSEY

Email Address JM_837@COLLEGE.EDU Date of Birth 12/05/2002

Education Level 2nd year/sophomore Dependent Status 1 - Dependent

Student Status 2 - Continuing Term Type 2 - Quarter

ISIR Txn Nbr 01 Total Income 79,383

Federal Award Amount 0 Institution Aid Amount 1,906

State Award Amount 0 TCP or 5th Year Program

Cost of Attendance 36,981

Upload Date 09/07/2022 Enrollment Status **Found in Roster**

Submit Reset

Student Award Summary- Award Status

Three Award Statuses:

- Awarded
- Financially Ineligible
- Withdrawn (occurs after a student is awarded, and on the roster)

Student Not Found:

- **Rejected Records:** Review the Enrollment File Report/MCS Enrollment Process Eligibility Summary Report (search by the week of submission).
- **Pended Records:** Student was uploaded by another campus or the student's award was rejected due to mismatched data between the enrollment record and CSAC's data.
- **Enrollment record not submitted**

Student Award Summary

WebGrants Student Award Summary screen displays:


- Eligibility- Total, Used, and Remaining
- Education Level
- Award Status: **Awarded**

NEW:

- Dependency Status
- Marital Status
- Family Size
- Award Status Date

Student Info

Name:	JASON MASSEY	5th Yr Program:	No
Address:	123 A ST. DUBLIN, CA - 94568	Year-Entered:	2022
Home Phone:	(510) 555-1212	Total-Eligibility:	300.00%
Cell Phone:		Used-Eligibility:	0.00%
Email:	jm_837@college.edu	Remaining-Eligibility:	300.00%
Dream Act ID / SSN:	123456789	Established Educational Level:	2nd year/sophomore
CSAC ID:	109123456	Current Educational Level:	2nd year/sophomore
DOB:	12/05/2002	Dependency Status:	DEPENDENT
TCP Flag:	No	Marital Status:	SINGLE
		Family Size:	
		Award Status Date:	09/23/2022



Award Details

Acad Year	Institution Name	Award Status	Reported Total Income	Reported Asset Amount	Reported Cost of Attendance	Reported Cal Grant Amount	Reported State Award	Reported Federal Grant	Reported Institutional Aid	Fall Award Amount	Winter Award Amount
2022	UC IRVINE (00131-00)	AWARDED	\$79,383	\$75,000	\$36,981	\$12,570	\$0	\$0	\$1,906	\$1,266	\$1,266

Enrollment File Report

The Enrollment File Report lists students who were rejected from the Enrollment File.

Three-digit error codes begin with:

- I= Ineligible
- R= Rejected

Two report formats available:

- Report: Provides a description of the error
- Data File: allows schools with the system capability to download the error codes

MCS_ENRL		CALIFORNIA STUDENT AID COMMISSION		PAGE: 153
BATCH DATE: 09/23/2022		MCS ENROLLMENT PROCESS ELIGIBILITY SUMMARY REPORT		RUN DATE: 09/23/2022
		ACADEMIC YEAR 2022		RUN TIME: 18:28:42
12345678922488532838	GARCIA JOHN	20020820203	JAG_839@UNI.EDU	2100000159000007245000000000000065250
R028	Rejected - Non-California Resident: MA			
22345678922614719859	NGUYEN HAI	N19990613502	BESTSTUDENT@UNI.EDU	5100000733080000000000000000000035496
R031	Rejected - Student's EL is not consistent with the TCP/5th Year Flag			
I005	Ineligible - Incomplete Verification			
32345678922610411196	NOVAK ANYA	020030627502	ANOVAK@HOTMAIL.ORG	1100000290980000000000000000000000000000
I005	Ineligible - Incomplete Verification			
42345678922612230153	JOHNSON AMBER	L20001202501	ANJ4EVER@TMAIL.GOV	5100000353510000000000000000000000000000
R031	Rejected - Student's EL is not consistent with the TCP/5th Year Flag			
I005	Ineligible - Incomplete Verification			
52345678922606277534	MARTINEZ-ZELAYA NAYELI	20010621501	NMZ@COLLEGE.EDU	3200000059010000000000000000000000000000
I005	Ineligible - Incomplete Verification			
62345678922615494546	BLACKWELL LAYLA	20050124102	LB398_T4\$@US.GOV	0100000436160005445000000000000000000000
R028	Rejected - Non-California Resident: FC			
R029	Rejected - Invalid Address - Foreign Country: FC			
72345678922611044657	ADEOYE ALLISON	M19971222201	GR8TFUL@CA.GOV	520000002886000724500196500000000035496
R031	Rejected - Student's EL is not consistent with the TCP/5th Year Flag			

Summary Information				
Total Number of Records	Eligible Records	Rejected Records	Ineligible Records	Pended Records
16238	14144	1412	632	50

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.
 Pended - Eligible, but not the first school to upload an eligible record.

Payments and Reconciliation

Payment Roster

Campuses can report annual and term-level payments and corrections for MCS using the 1) online roster or through the 2) batch upload process

CSU SACRAMENTO					
Student List					
Total number of records: 120					
Filter					
View	SSN	CSAC ID	Last Name	First Name	DOB
	123456789	103123456	DRAYTON	GENEVIEVE	08/12/1995
	234567890	111234567	GONZALEZ-PAEZ	FRANK	11/06/2000
	345678901	123456789	ZHENG	RACHEL	05/27/2001
	456789012	109123456	GILL	MARIANA	05/18/2001
	678901234	107123456	CARPENTER	ZOEY	04/01/1992
	789012345	111234567	BLACKWELL	GRANT	03/13/2003

Reporting Payments

There are SIX payment options available to campuses:

1. **FT-(Pay):** Applies a payment equal to the student's term/enrollment status and uses full eligibility.
(50% - semester)
(33.33%-quarter)
2. **TT-(Pay):** Applies a payment equal to the term award amount and uses three quarter -time eligibility.
(37.5%- semester)
(25% -quarter)
3. **HT-(Pay):** Applies a payment equal to the term award amount and uses half -time eligibility.
(25% - semester)
(16.67%-quarter)
4. **Less Than HT –(Do Not Pay) & Not Enrolled:** Applies a \$0 payment and zeros out the award amount. No eligibility is used.
5. **Refund/Adjusted Payment:** Allows a payment less than the term amount to be applied but uses full -time eligibility, unless a payment of \$0 is applied.
6. **Payments and corrections:** Processed on Tuesday nights and over the weekend. Results can be viewed on Wednesdays and Mondays.



Payment – Enrollment Status



Students can now be paid for Three Quarter Time (TT).

Term Data		
FALL TERM	WINTER TERM	SPRING TERM
Enrollment Status []	Enrollment Status []	Enrollment Status []
Max Term Award Amount [\$1266]	Max Term Award Amount [\$1266]	Max Term Award Amount [\$1266]
Term Award Amount [\$1266]	Term Award Amount [\$1266]	Term Award Amount [\$1266]
Adj. Reason Code []	Adj. Reason Code []	Adj. Reason Code []
Amount Paid/Verified [\$]	Amount Paid/Verified [\$]	Amount Paid/Verified [\$]
Cost of Attendance [\$12327]	Cost of Attendance [\$12327]	Cost of Attendance [\$12327]
Federal Aid [\$0]	Federal Aid [\$0]	Federal Aid [\$0]
Institutional Aid [\$636]	Institutional Aid [\$635]	Institutional Aid [\$635]
State Aid [\$0]	State Aid [\$0]	State Aid [\$0]
Payment Status Not Reconciled	Payment Status Not Reconciled	Payment Status Not Reconciled

Payment/Correction Process

The roster allows users to directly report payments or corrections at the annual or term-level. This example shows an annual-level correction to the Cost of Attendance. After the transaction is saved, the newly reported data will be reflected the following Wednesday or Monday, after CSAC completes the processing of files.

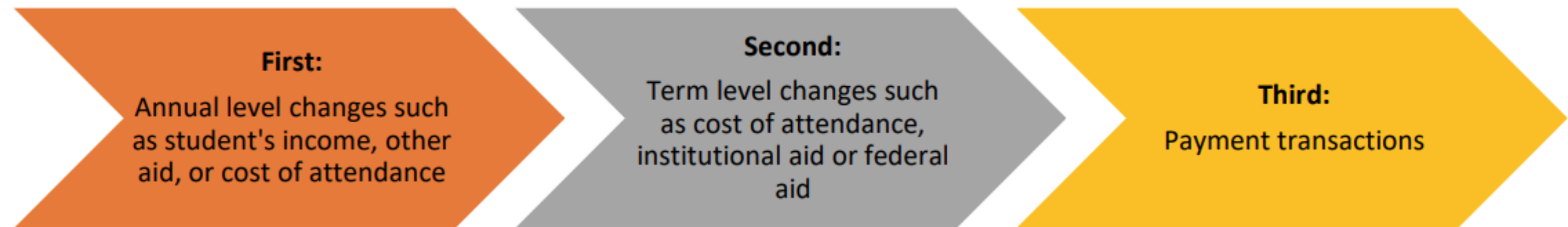
The screenshot displays a web form for reporting a transaction. The 'Transaction Type' section is highlighted with a red box, showing 'Correction' selected over 'Payment', and 'Annual Data' selected over 'Term Data'. The 'Annual Data' section includes a dropdown for 'Eligibility Change' set to 'Eligibility', 'Academic Year' set to '2022 - 2023', and 'Open Terms' set to 'Fall, Winter, Spring'. A table of financial data is shown, with 'Cost of Attendance' highlighted in red, displaying '\$19836' and a corresponding input field with '2500'. Other fields include 'Total Income' (\$68472), 'Federal Aid' (\$0), 'Institutional Aid' (\$0), 'State Aid' (\$0), and 'ISIR Tran #' (02). Buttons for 'Save' and 'Reset' are at the bottom.

Field	Value	Input Field
Transaction Type	Correction	
Transaction Type	Payment	
Annual Data	Annual Data	
Annual Data	Term Data	
Eligibility Change	Eligibility	
Academic Year	2022 - 2023	
Open Terms	Fall, Winter, Spring	
Total Income	\$68472	\$
Cost of Attendance	\$19836	\$ 2500
Federal Aid	\$0	\$
Institutional Aid	\$0	\$
State Aid	\$0	\$
ISIR Tran #	02	

Hierarchy of Corrections

When making corrections, report changes in the following hierarchy:

- **Annual -level changes** to total cost of attendance, total income, or other aid that could potentially impact the student's MCS award eligibility and amount, should be submitted *before* term level changes or payment transactions. CSAC will recalculate the award during the weekly processes and update the roster accordingly the following Wednesday or Monday.
- **Term -level changes** to institutional aid or federal aid should be reported before payments.
- **Payments should only be applied after award Information has been verified as accurate**



Student Award Payment History

This screen provides information on all payments and corrections applied at both the annual and term level. Also displays eligibility used with each payment.

Name	JASON MASSEY		SSN	123456789					
Status	AWARDED		CSAC ID	109123456					
Institution Name	Acad Year	Term	Pay Amt	Pay Type	Pay Status	Adj Reason	Elig Used	Date	Created By
UC IRVINE	2022	SP		C		Eligibility	0.00	10/21/2022	yhollings
UC IRVINE	2022	WN		C		Eligibility	0.00	10/21/2022	bdrayton
UC IRVINE	2022	FL		C		Eligibility	0.00	10/21/2022	vgonzale
UC IRVINE	2022	FL	\$55	P	Reconciled		33.33	01/06/2023	yhollings
UC IRVINE	2022	WN	\$69	P	Reconciled		33.33	01/20/2023	vgonzale

Correction: Field 41- Eligibility Change

This field should only be used when making corrections at the **annual** level. Data values appearing in **red** will result in the student being withdrawn from the roster.

0 - Educational Level Change

1 - Post Bacc

2 - SAP

3 - Eligibility

4 - Not Enrolled

5 - Other

7 - Over Asset Ceiling

8 - Add Teacher Credential Program (TCP)/5th year program flag

9 - Remove Teacher Credential Program (TCP)/5th year program flag

Corrections to Income

Income corrections should only be reported in these three situations:

1. Does not meet income ceiling criteria- the awardee no longer meets the authorized income ceiling
2. Total income over \$100k –if the dependent awardee now exceeds the total income of \$100,000 dollars, or if the income remains over \$100,000 dollars but the amount has changed, then a correction should be made to the student's record
3. Total income under \$100k –if the dependent awardee is now under the total income of \$100,000 dollars, then a correction should be made to the student's record.

New! CSAC recently updated WebGrants to recalculate a student's MCS 2.0 award based on new ISIRs submitted by campuses. It now calculates the updated parent contribution and other values in the ISIR reported with the correction

Payment File Layout & Upload

Middle Class Scholarship Payment-Roster File Record Layout -- Expanded Version --- AY 2022-23 -- Updated 9/13/2022 --								
File Field #	Data Elements	Length	Position	Justify	Format & Valid Content	CSAC Provides in Down-load	School Provides in Upload	Logic Rules and Descriptions
FILE HEADER								
1	Transaction Code	4	1 - 4	Left	XXXX MCSP – (Upload to CSAC) MCSR – (Download from CSAC)	X	X	1. Value cannot be blank. 2. Value cannot contain numeric characters. 3. Value must = "MCSP" when school is providing CSAC with an uploaded "Payment" File. 4. Value will = "MCSR" when CSAC provides the schools with the downloadable "Roster" File.
2	Data Media	2	5 - 6	Left	## 09 = Data Transfer Facility	X	X	1. Value must = "09" 2. Value cannot be blank. 3. Value cannot contain alpha characters.
3	Filler	6	7 - 12	Left	Blank	X	X	N/A
4	Submitter Identification	8	13 - 20	Left	X##### USDE School Code Number	X	X	1. Value cannot be blank. 2. Value must be in format provided. 3. Value must = the School ID entered by the school user on the WebGrants File Upload screen.
5	Submitter Source Code	1	21	Left	X S = School	X	X	1. Value cannot be blank. 2. Value cannot contain numeric characters. 3. Value must = "S"
6	Submitter Name	32	22 - 53	Left	X##### ##### School Name	X	X	1. Value cannot be blank.
7	Processing Date	8	54 - 61	Left	##### CCYYMMDD	X	X	1. Value cannot be blank. 2. Value cannot be a future date. 3. Value cannot be a date LT 20220701. 4. Value cannot contain alpha characters. 5. Value must be in the format provided.

MCS funds are disbursed to campuses by CSAC *after* schools verify student attendance and eligibility, and report student payments.

To initiate an EFT payment for disbursement of MCS, properly format a Payment File, and upload the file as a text file .txt or .csv

Invalid Records

Home > MCS > File Upload > MCS File Upload

File Upload

School ID*


Academic Year*

File Type*

File*

Please enter the file path and file name.

File Upload Status

 File Header/Footer error. Please correct errors and upload entire file again

File Name	Total Records
<input type="text" value="REDACTED"/>	4
File Size	Valid Records
0.91796875 kb	0
Academic Year	Invalid Records
2022 - 2023	0

After attempting to upload the payment file, if any invalid records exist, the file will reject. The file must be corrected and uploaded again.

'Download Error Report' provides details about the error.

Recertify Payments

What causes the recertify?

- When a student was previously paid for the term(s) and a correction is applied at the annual and/or term level.
- Changes to **income, Other Aid, and T/F** cause the award to be recalculated.
- The new award overrides the current payment with the revised award amount.

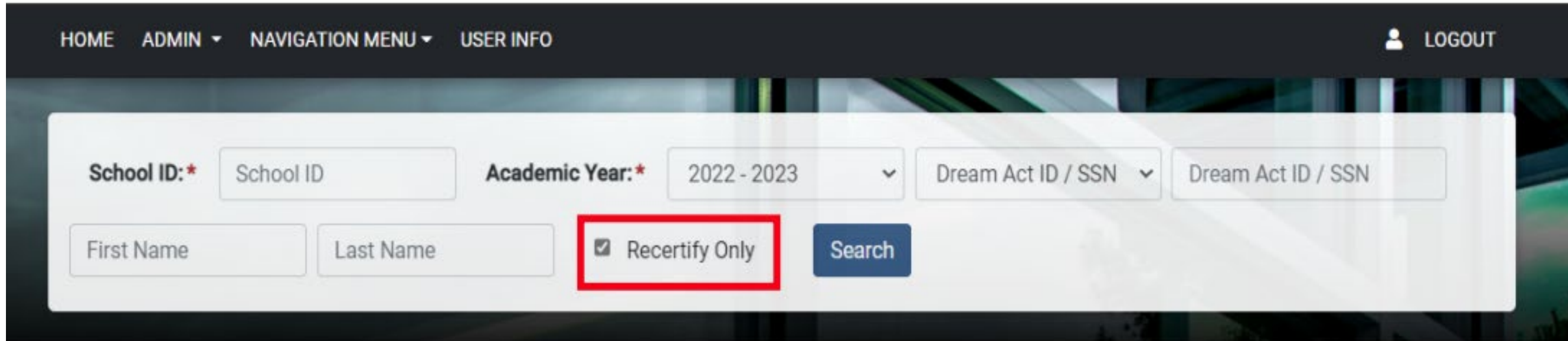
How to Resolve?

- Campus must verify the new payment amount using the “**Enrollment Status**” function or the “**Refund/Adjusted Payment**” function

Recertify Payments

[Home](#) > [MCS](#) > [Display Roster](#)

Check the “Recertify Only” button:



The screenshot shows a web interface for recertifying payments. At the top, there is a navigation bar with links for HOME, ADMIN, NAVIGATION MENU, and USER INFO, along with a LOGOUT button. Below this is a search form with several input fields: School ID, Academic Year (set to 2022 - 2023), Dream Act ID / SSN, First Name, and Last Name. A checkbox labeled "Recertify Only" is checked and highlighted with a red box. A blue "Search" button is also visible.

The list of students can be exported by choosing the file type and selecting “Download Roster” button:



The screenshot shows a student roster for CSU SACRAMENTO. The title "Student List" is at the top left, and "Total number of records: 120" is displayed below it. A filter input field is present. On the right side, there is a dropdown menu set to "Text Format" and a green "Download Roster" button, both highlighted with a red box. Below this is a table with columns for View, SSN, CSAC ID, Last Name, First Name, and DOB. Two student records are visible.

View	SSN	CSAC ID	Last Name	First Name	DOB
	123456789	103123456	DRAYTON	GENEVIEVE	08/12/1995
	234567890	111234567	GONZALEZ-PAEZ	FRANK	11/06/2000

Recertify Payments

[Home](#) > [MCS](#) > [Display Roster](#)

Example:

Student was originally paid \$160 for fall term

Award was recalculated and resulted in a lower term -level award amount (\$60).

The new payment must be recertified for \$60.

Term Data		
FALL TERM	WINTER TERM	SPRING TERM
Enrollment Status [HT - (Pay)]	Enrollment Status []	Enrollment Status []
Max Term Award Amount [\$60]	Max Term Award Amount [\$320]	Max Term Award Amount [\$320]
Term Award Amount [\$60]	Term Award Amount [\$320]	Term Award Amount [\$320]
Adj. Reason Code [Recertify Payment]	Adj. Reason Code []	Adj. Reason Code []
Amount Paid/Verified [\$160]	Amount Paid/Verified [\$]	Amount Paid/Verified [\$]
Cost of Attendance [\$11695]	Cost of Attendance [\$11695]	Cost of Attendance [\$11695]
Federal Aid [\$449]	Federal Aid [\$448]	Federal Aid [\$448]
Institutional Aid [\$8384]	Institutional Aid [\$7384]	Institutional Aid [\$7383]
State Aid [\$0]	State Aid [\$0]	State Aid [\$0]
Payment Status Reconciled	Payment Status Not Reconciled	Payment Status Not Reconciled

Reconciliation

Tips and Recommendations

- 1 Reconcile weekly or monthly by utilizing reports (Payment Activity and Student Reconciliation)
- 2 Review recertified payments weekly or monthly (use export function from roster screen)
- 3 Reconciliation deadline: September of each processing year
- 4 Refer to MCS Guide and Roster Layout for specific scenarios



Awarding Process



School identifies potentially eligible students and submits on **MCS enrollment file**



CSAC processes students for MCS awards, places them on **MCS roster**



School reviews roster and approves for payment, **CSAC initiates payment process**



CSAC sends payment request to State Controllers Office, **paper warrants issued**



CSAC mails paper warrants to institutions, payable to the institution, not the student



Institutions cash checks, disburse funds on student accounts

CCC Bachelor (CCBA) Degree Program



MCS Eligibility Criteria

CCC Bachelor Programs

- FAFSA/CADAA submitted by March 2
- Education level = 4th year undergrad or less
- CA resident or exempt from non-resident tuition (AB 540)
- At least half-time enrollment in upper division coursework @ CCC Bach program
- Making SAP
- Under MCS income and asset ceilings

Reports


Report Download

WebGrants: MCS>MCS - Data Transfer>Report Download


1

HOME ADMIN ▾

WebGrants



CAL GRANT



MCS

- Enrollment
- GPA
- Student Info
- Roster/Reconciliation
- Data Transfer
- Non-SSN GPA
- Foster Youth Verification

- Report Download**
 - Student Award Summary
 - Student Award Payment History
 - Student Enrollment Data
 - MCS Display Roster

2

CALIFORNIA STUDENT AID COMMISSION

CA.GOV | CSAC.CA.GOV | Privacy Policy | Tools | Help

HOME ADMIN ▾ NAVIGATION MENU ▾ USER INFO LOGOUT

School ID: 00131400 Acad Year: 2022 - 2023 Month: October

File Type: --SELECT-- Media: Data File Search

Home > MCS

- Enrollment File Report
- Roster File Report
- Accept/Reject Report
- Payment Activity Report
- Admission File Report
- Award Rejects Report
- Student Reconciliation Report
- MCS CG Sync Report

Close Page Instructions

- To select [report type], click search.
- To download, click the download button.
- File Type - Roster File Report, Accept/Reject Report, Student Reconciliation Report (Manual), Student Reconciliation Report can be retrieved and downloaded in Data File and Report media type only.
- File Type - Roster File Report, Accept/Reject Report can be retrieved and downloaded in Data File media type only.
- File Type - Awards Reject Report, Payment Activity Report, MCS CG Sync Report can be retrieved and downloaded in Report media type only.

Reports

Report Type	Media Types	Description
Enrollment File Report	Data File & Report	Lists students who are ineligible for an MCS award or were rejected from the Enrollment File. Data File Format: Displays error codes, "I" for ineligible; or "R" for rejected, followed by a three -digit code (I002, R020, etc.). A description of the error is provided in the "Report" format.
Award Rejects Report	Report	Identifies students who were rejected due to mismatched data between the enrollment file submitted by the campus and CSAC's system. To correct the record, send copies of the student's SSN and CA Driver's License/ID to School Support, "Attn: MCS Processing". <ul style="list-style-type: none"> • If CSAC corrects data to match the enrollment file, the student will get picked up in the next award cycle. • If CSAC data is correct, and the enrollment file is wrong, the campus must submit a new enrollment record to match CSAC's data.
Roster File Report	Data File	Lists award info: payments, adjustments, current amounts in place (Award, Income, Tuition/Fee, Other Aid, Eligibility %, Educational Level, TCP/5th Year Flag) of students currently on the school's roster
MCS CG Sync Report	Report	Lists records that went through the MCS -Cal Grant data match process. Provides a summary of the students Cal Grant and MCS awards before and after the process ran. A summary of the student's eligibility status is also provided.

Reports

Report Type	Media Types	Description
Accept/Reject Report	Data File	<p>Lists students who had payments or corrections applied during the week. The report is broken down into three sections: Exception, Rejected and Accepted.</p> <p>Exception Section = WebGrants cannot define the type of transaction being applied. The txn is invalid or there is no valid txn in the file. The majority of record in this section are from attempts to apply a payment & correction to the same student within the same file, or an attempt to make annual and term level corrections for the same student</p> <p>Rejected Section = The payment or correction was rejected due to an edit in place for the txn . Often because the information being submitted is not in the correct format.</p> <p>Accepted Section = The payment or correction was accepted and applied to the student's record</p>
Payment Activity Report	Report	Summary of payments made to institutions, reconciled payment transactions, amount of funds disbursed to institutions, payment transactions and balances. Including a summary of the Year -to -Date activity
Student Reconciliation Report	Data File & Report	A summary of reconciled payments greater than \$0 (to date). Payments with an existing adjustment reason code are not listed on the report

Resources

MCS Handbook

The **MCS Handbook** provides guidance and direction on student eligibility as well as the application, awarding, disbursement/adjustment, and reconciliation processes.

It contains the following topics:

- Payment/Enrollment file layouts and upload instructions
- Accept/Reject Report and codes
- Annual and Term -level Changes
- Drop, Withdraw, & Refund Policy (R2T4)
- Payment and Correction Scenarios
 - Part-time attendance
 - Repeat coursework policy
 - Study Abroad

