




# Cal Grant Regional Training Reports and Tools

# Disclaimer

*All student data provided in the following reports are fictitious. Student names, Date of Births, GPAs and school information have been modified to protect all third parties. All material presented today is for training purposes only.*


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**CAL GRANT**

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



**CAL GRANT**

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- File Upload
- **Report Download** ←
- Data Transfer
- Non-SSN GPA
- Foster Youth Verification

# College Reports

Some reports are generated automatically while other reports are *feedback* reports, in response to a batch upload submitted by schools

CALIFORNIA STUDENT AID COMMISSION

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School ID: 00115000 Acad Year: 2022 - 2023 Month: All

Report: All Media Type: All **Search**

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Report Types:

- All
- APLE Renewal Reports
- Accept/Reject
- Applicant Report
- Asset Protection Allowance Hold
- Audit File
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- Award Status Extract - Awarded
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- Award Status Extract Upload Summary
- Byrd Rosters
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- California Dream Act Correction ISIRs
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- Chafee ILP Eligibility Verification Form
- Chafee Need Analysis Report
- Chafee Status Roster By School
- DA Duplicate Account Clean-up Report
- Disqualified Renewal Students

Close Page Instructions

Load File button.

descending order by clicking on the column headings.

Report and Data File for Media Type.

Report and the Delete checkbox column will appear.

File Transfer for Report and the Delete checkbox column will appear.

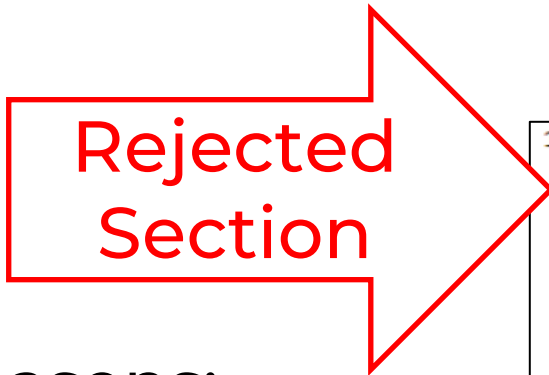
# Available Reports

Name of Report	Description of Report	Report Frequency	Review frequency
<b>Accept/Reject</b>	Accepted and rejected transactions from previous weeks' reported transactions. Review weekly to resolve rejected transactions	Weekly	Weekly
<b>Award Status Extract</b>	Used during award packaging. Identifies awarded and non-awarded students. Non-awarded students who have not claimed their college of attendance will not appear on your roster.	After file submission	Week after file submission
<b>Cal C Supplement Recipient</b>	Lists all students found potentially eligible for Cal Grant C and whether the Cal Grant C Supplement form was submitted	Weekly	Weekly
<b>Education Level Verification</b>	Identifies flagged Cal Grant records requiring EL verification	Weekly	Weekly
<b>Education Level Verification Accept/Reject</b>	Identifies accept/reject status of reported verification(s)	After file submission	Week after file submission

# Available Reports

Name of Report	Description of Report	Report Frequency	Review frequency
<b>Grant Roster</b>	Comprehensive list of Cal Grant awardees and their grant information	Weekly	Weekly
<b>Unclaimed Awards</b>	Shows students with no reported payments from any of the schools listed on the FAFSA/CADAA. Assists schools with claiming awards for their attending students.	Weekly (between June and September)	Weekly
<b>Monthly Payment Activity</b>	Used during reconciliation. Itemizes funds advances, reconciled transactions, and supplemental payments	Weekly	Weekly
<b>School Change Upload</b>	Produced after schools upload a school change file. Lists rejected school changes and reject reasons	After file submission	Week after file submission
<b>Student Overlap</b>	Lists students who were eligible for both Cal Grant A & B (“auto-accepted” for one Cal Grant, and “qualified” for the other)	Weekly (between May and September)	Weekly

# Accept/Reject Report



Rejected Section

CALIFORNIA STUDENT AID COMMISSION													PAGE : 1		
ACCEPT/REJECT REPORT													RUN DATE: 10/05/2018		
00115000 - CSU SACRAMENTO													RUN TIME: 22:48:12		
REJECTED SECTION															
GRANT ID#	SSN	STUDENT LASTNAME	FIRST NAME	M I	PROCESS DATE	SRC CODE	ACT CODE	PGM CODE	NEED	ADJ NEED	PAY TYPE	TERM	AMOUNT	ADJ RSN	PAY STATUS
E12345678	123456789	ROBLES	KEVIN	R	10/05/2018	S	U	B			T/F	FL	2871.00	FT	
6732: EL VERIFICATION REQUIRED															
E12345678	123456789	SMITH	VANESSA		10/05/2018	S	U	B			T/F ACC	FL FL			NP NP
6738: TUITION STATUS CODE INVALID FOR FL 6738: ACCESS STATUS CODE INVALID FOR FL															
E12345678	123456789	JOHNSON	BRETT	S	10/05/2018	S	U	B			T/F ACC	FL FL	2153.00 627.00	TT TT	
6733: STUDENT NOT ELIGIBLE FOR GRANT AWARD															
E12345678	123456789	OWENS	CHRISTINE	K	04/05/2019	R	U	B	20636		ACC	SP	0.00	LA	
6735: NO TRANSACTION REPORTED FOR FL TERM(S)															
E12345678	123456789	TAKANAKA	KENJI	C	05/17/2019	C	U	B	0	0	ACC	SP	0.00		NA
8800: Current school has made payment in this academic year.															
E12345678	123456789	DRAYTON	BRIAN	A	05/17/2019	C	U	B	0	0	ACC	SP	0.00		NA
8805: Duplicate transaction.															

**Common Reject Reasons:**

- EL Verification Required
- No transaction reported for previous term
- Another school already posted payment
- Duplicate Transaction

ACCEPTED SECTION															
GRANT ID#	SSN	STUDENT LASTNAME	FIRST NAME	M I	PROCESS DATE	SRC CODE	ACT CODE	PGM CODE	NEED	ADJ NEED	PAY TYPE	TERM	AMOUNT	ADJ RSN	PAY STATUS
		ACEVEDO	AMALIA		10/28/2011	C	U	C	18498	0	B&S	FL	216.00		TT
		ACEVEDO	WILBALDO	J	10/28/2011	C	U			0	ACC	FL	776.00		PD
		ACEVES	MITZI	V	10/28/2011	C	U	B	9389	0	ACC	FL	388.00		HT
		ACEVES	RICHARD		10/28/2011	C	U	B	0	0	ACC	FL	776.00		PD
		AGUILAR	JEANNETTE		10/28/2011	C	U	B	0	0	ACC	FL	776.00		PD
		AGUILERA	ANA	J	10/28/2011	C	U	B	0	0	ACC	FL	776.00		PD
		ALBARRANSALINAS	MARIA		10/28/2011	C	U	C	0	0	B&S	FL	288.00		PD
		ALBRIGHT	MEGAN	R	10/28/2011	C	U	B	0	0	ACC	FL	776.00		PD

Accepted Section



Accepted Section

# Award Status Extract

567898205MILTON	JENNIFER	E19711026NC175844418227.5	B 1670	ACSS	1670
565439833ROMAN	AMY	P19850516NC175861614100	B 7142T/F 5472	ACSS	1670
580816087REYES	ADRIANA	O19850330NC175931094100	B 7142T/F 5472	ACSS	1670
687672303LEO	JESUS	P19720519NC176013053200	B 7142T/F 5472	ACSS	1670
649002369CETE	JEREMY	L19860124NC175899324200	B 7142T/F 5472	ACSS	1670
550220979GOOD	TONI	19870025NC175993414100	B 1670	ACSS	1670
569877455TOMAS	LEILA	P19770628NC175932902200	B 7142T/F 5472	ACSS	1670
595551556RAMIREZ	BRITTANY	19870903NC175811773200	B 7142T/F 5472	ACSS	1670
603280114FOU	ARIA	19890717NC175918411100	B 7142T/F 5472	ACSS	1670
629914380WEATHER	RICH	S19891229NC176005349200	B 7142T/F 5472	ACSS	1670

**Awarded Report**

538068129	No record found or application not processed
556084282	No record found or application not processed
613187790	School not listed in the award ISIR transaction
625228110	No Archive ISIR record found
615160682	No record found or application not processed
512377814	No Archive ISIR record found
658208245	No record found or application not processed
564672006	No record found or application not processed
207600199	No record found or application not processed
388568270	No record found or application not processed
426272227	No record found or application not processed
466877382	No record found or application not processed
528895131	No record found or application not processed

**Non Awarded Report**



# Cal Grant C Supplement Recipient

CAL C SUPPLEMENT RECIPIENT REPORT								07/30/2021
ACADEMIC YEAR 2021								
AMERICAN RIVER COLLEGE - 00123200								
SSN	Last	First	MI	Address	City	State	Zip Code	C Supp Form
012345678	AGUILAR	MELANIE	J	1234 5 <sup>th</sup> AVE #305	PARIS	CA	95838	Y
123456789	BROWNE	JOSEPH	A	1809 DAFFODIL LANE	CITRUS HEIGHTS	CA	95660	N
234567890	DRAYTON-LOPEZ	BRIAN		517 TRACY CT.	DAVIS	CA	95823	Y
345678901	DOSTOEVSKI	SERGEI		PO BOX 839	SACRAMENTO	CA	95660	N
567890123	NGUYEN	DUI		19 WEST, SPACE 39	ELK GROVE	CA	95670	N
678901234	ZIMMERMAN	DREW	E	62118 ABBOTT ST.	FOLSOM	CA	95838	N

Identifies  
*potential* Cal  
Grant C  
awardees.

C Supp Form  
submitted?

- Y/N

# Education Level (EL) Verification

EL is directly tied to lifetime eligibility (EL 1= 400%/4 years; EL 2= 300%/3 years, etc.). Flagged records are verified just once- by the campus that reports the first Cal Grant disbursement.

ELTN09	00131200	UNIV OF CA - BERKELEY	28apr17						
613880854	2016	00131200	3	RISTON	KAMIE	19960128	B	5	Unable to verify
621509079	2016	00131200	3	RUILA	MICKA	19950307	B	5	Unable to verify
564554504	2016	00131200	4	NORTON	SONNY	19650416	B	5	Unable to verify
800244171	2016	00131200	3	ZION	MILA	19961225	B	5	Unable to verify
556678508	2016	00131200	3	MONAN	DELANIE	19710521	B	5	Unable to verify
620644777	2016	00131200	3	ROSS	BETH	19861105	B	5	Unable to verify
617237510	2016	00131200	3	PARKER	BEN	J 19730908	B	5	Unable to verify

# Education Level (EL) Verification Accept/Reject

SABELAR CALIFORNIA STUDENT AID COMMISSION PAGE: 1  
EL VERIFICATION ACCEPT REJECT REPORT

ACCEPTED SECTION 00131300

SSN NBR	EL CODE	EL VERIFICATION STATUS
00000000	3	3--Verified as reported
00000000	3	3--Verified as reported
00000000	3	3--Verified as reported
00000000	3	4--Verified with change
00000000	3	3--Verified as reported
00000000	3	3--Verified as reported
00000000	3	3--Verified as reported
00000000	3	3--Verified as reported
00000000	3	3--Verified as reported
00000000	4	4--Verified with change

Accepted Section

SABELAR CALIFORNIA STUDENT AID COMMISSION PAGE: 2  
EL VERIFICATION ACCEPT REJECT REPORT

REJECTED SECTION 00131500 - UNIV OF CA - LOS ANGELES

SSN NBR	EL CODE	EL VERIFICATION STATUS	REJECT REASON
123456789	3	3--Verified as reported	Invalid award status code
223456789	4	4--Verified with change	Invalid award status code
333456789	4	4--Verified with change	Invalid award status code
444456789	3	3--Verified as reported	Invalid award status code

Rejected Section

AB 840 stipulates that 10% of new & renewal awards are randomly flagged for verification of Transfer Entitlement eligibility. This report identifies flagged records. Complete verification prior to disbursement, after verifying:

- Graduated or equivalent from CA high school
- CA resident at time of high school graduation or on 18th birthday
- Under age 28 at time of transfer
- Direct transfer from CCC to BDGI
- Sufficient financial need
- 2.4 CCC GPA

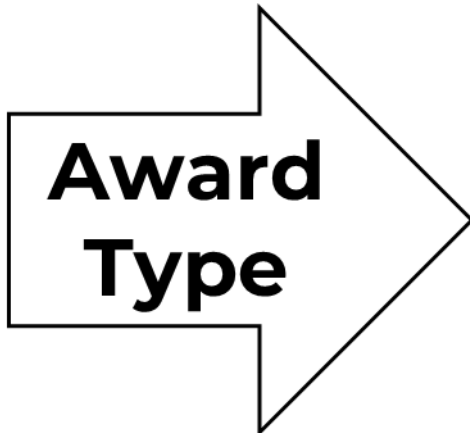
AHTN09	00131200UNIV OF CA - BERKELEY 28apr17					
608202373	2016	00131200	NICOS	RICO	A E15149070	B 1 150
611733155	2016	00131200	LOREN	BEN	E16356971	B 1 300
618388654	2016	00131200	MARTIN	LITA	A E16365028	B 1 200
616216667	2016	00131200	BERNETT	SAM	E16346358	B 1 200
626748655	2016	00131200	GAZIZ	SHAE	S E15166463	B 1 100

# Monthly Payment Activity Report

DATE ----	ACTIVITY -----	FUNDS DISBURSED TO INSTITUTION -----	PAYMENT TRANSACTIONS -----	BALANCE -----
08-12-20	FALL ADVANCE	28,727,303.00		28,727,303.00
08-21-20	FALL RECONCILED PAYMENT TRANSACTIONS		414.00	28,726,889.00
08-28-20	FALL RECONCILED PAYMENT TRANSACTIONS		9,412.00	28,717,477.00
09-04-20	FALL RECONCILED PAYMENT TRANSACTIONS		9,574.00	28,707,903.00
09-11-20	FALL RECONCILED PAYMENT TRANSACTIONS		0.00	28,707,903.00
09-25-20	FALL RECONCILED PAYMENT TRANSACTIONS		0.00	28,707,903.00
10-09-20	FALL RECONCILED PAYMENT TRANSACTIONS		0.00	28,707,903.00
10-16-20	FALL RECONCILED PAYMENT TRANSACTIONS		26,980,223.00	1,727,680.00
10-23-20	FALL RECONCILED PAYMENT TRANSACTIONS		311,966.00	1,415,714.00
10-30-20	FALL RECONCILED PAYMENT TRANSACTIONS		315,308.00	1,100,406.00
11-06-20	FALL RECONCILED PAYMENT TRANSACTIONS		318,589.00	781,817.00
11-13-20	FALL RECONCILED PAYMENT TRANSACTIONS		558,035.00	223,782.00
11-20-20	FALL RECONCILED PAYMENT TRANSACTIONS		85,753.00	138,029.00
11-27-20	FALL RECONCILED PAYMENT TRANSACTIONS		969,999.00	-831,970.00
11-27-20	RECONCILED PAYMENT TO INSTITUTION	831,970.00		0.00

Once advanced funds are exhausted, supplemental funds are automatically deposited

# Monthly Payment Activity YTD Summary



	YEAR-TO-DATE ACTIVITY				
	FALL	WINTER	SPRING	SUMMER	TOTAL
CAT/F	6,481,043.00	0.00	5,742.00	0.00	6,486,785.00
CBT/F	14,700,032.00	0.00	30,146.00	0.00	14,730,178.00
CBACC	5,718,419.00	0.00	10,241.00	0.00	5,728,660.00
CBTOTAL	20,418,451.00	0.00	40,387.00	0.00	20,458,838.00
CCT/F	0.00	0.00	0.00	0.00	0.00
CCB/S	0.00	0.00	0.00	0.00	0.00
CCTOTAL	0.00	0.00	0.00	0.00	0.00
GFT/F	0.00	0.00	0.00	0.00	0.00
TOTAL GRAND TOTAL	26,899,494.00	0.00	46,129.00	0.00	26,945,623.00
TERM	NUMBER OF PAYMENT TRANSACTIONS RECONCILED		NUMBER OF PAYMENT TRANSACTIONS ACCEPTED BUT NOT YET RECONCILED		
FALL	16,053		0		
WINTER	0		0		
SPRING	652		0		
SUMMER	0		0		

# School Change Upload

```
SABCST                                CALIFORNIA STUDENT AID COMMISSION                                PAGE: 5
                                SCHOOL CHANGE DATA FILE UPLOAD REPORT

00131300 - UNIV OF CA - DAVIS

00000000 FL Student is not present in the roster
00000000 FL Invalid SSN
00000000 FL Student is not present in the roster
00000000 FL Student is not present in the roster
00000000 FL Invalid SSN
00000000 FL Invalid SSN
00000000 FL Student is not present in the roster
00000000 FL Invalid SSN
00000000 FL Student is not present in the roster
00000000 FL Student is not present in the roster
00000000 FL There are no record in date application table for this SSN
00000000 FL Student is not present in the roster
00000000 FL 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 school change by Commission staff.

Record Counts
Number of records read..... 1382
Number of records converted to school change transactions..... 1213
Number of records that could not be converted to school change transactions 168
Number of blank records..... 1

*** END OF REPORT ***
```

**Rejected Records**

# School Overlap

2019	00115000	CSU SACRAMENTO
123456789BRENDA	REYES	A19941125E2N3B
223456789AMBER	JOHNSON	G19860318C1N4B
323456789KAREEM	ALWARTHAN	19991019E2N3B
423456789BRIAN	DRAYTON	20001027E1N1B
523456789DUI	TRAN	20010331E1N1B
623456789MICHELLE	ADAMS	E20001119E1N1B
723456789VLADIMIR	SMIRNOFF	N20010222E1N1B
823456789RAUL	CAMPOSGARCIA	S20001217E1N1B



# Unable to Determine Renewal Eligibility

UDHD09	YOUR SCHOOL NAME HERE		
GPUDABDULKHALIQ	AMEER	274026951B	FL, SP
GPUDABED	JENNA	M122820206A	FL, SP
GPUDABOYE	TEWODROS	E612855755B	FL, SP
GPUDABUSHANAB	NOOR	A635585848B	FL, SP
GPUDACOSTA	DOUGLAS	505390059B	FL, SP
GPUDADJEI	CHANEL	A616944623B	FL, SP
GPUDAGBALOG	ANGELICA	610260267B	FL, SP
GPUDAGEE	BENJAMIN	P602688363B	FL, SP

# Unclaimed Awards

ucar-2019-00115000-24apr20.txt  
BATCH DATE: 04/24/2020

CALIFORNIA STUDENT AID COMMISSION  
UNCLAIMED AWARDS FOR CSU SACRAMENTO (00115000)  
ACADEMIC YEAR 2019

PAGE: 1  
RUN DATE: 04/25/2020  
RUN TIME: 02:46:28

SSN	LAST NAME	FIRST NAME	M I	BIRTH DATE	CYCLE ID	PROG CODE	NEW/ REN	CURRENT SCHOOL	LOA	ADDRESS
000012345	GALLEGOS	JOHN	A	11/25/1994	E2	B	N	Y		123 ALPHA ST. RIVERSIDE, CA 95367 JGALLEGOS@UNI.EDU
123456789	DRAYTON	BRIAN	Y	12/18/1993	E2	B	R	Y		1234 BRAVO DR. STOCKTON, CA 95205 BHOLLYWOOD@COLLEGE.NET
000048997	GARCIA-RAMON	JOSEFINA	S	01/21/1995	C1	B	N			12345 CHARLESTON LANE SAN DIEGO, CA 92114 JGR@HOTMAIL.NET
000068941	MEYERS	CHERYL	M	03/27/1996	E1	B	R	Y		2234 DELTA AVE ANTELOPE, CA 95843 MEYERSCHER10@GMAIL.COM
000079038	DAVIS	MICHELLE	N	11/30/1997	E2	A	N			3334 ECHO DRIVE APT 19 SACRAMENTO, CA 95670

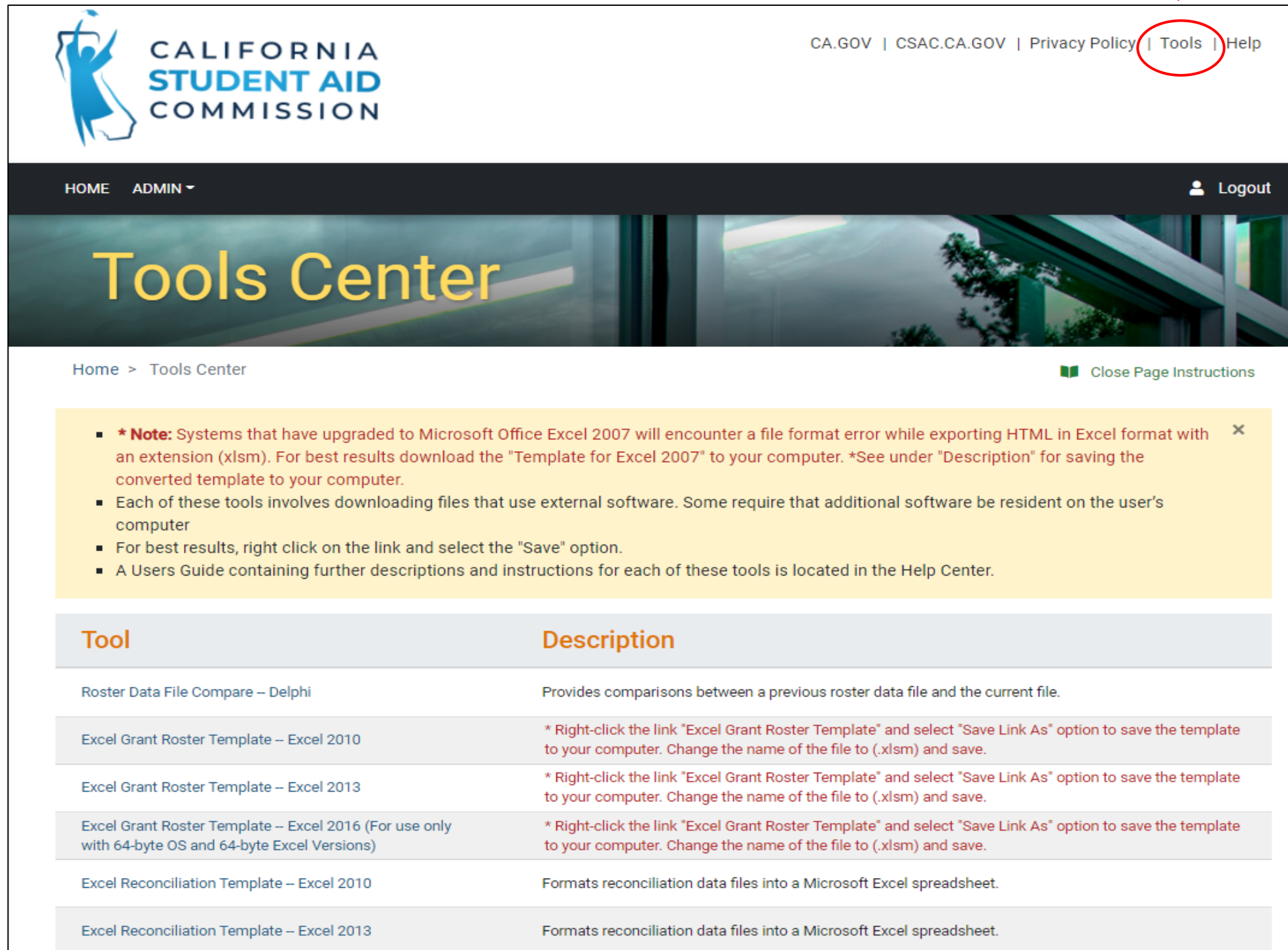


**Roster Data File Compare- Tools menu**  
Compare two different rosters to help identify changes (dropped, changed and newly added) between rosters

**Grant Roster Template- Tools menu**  
Used to download rosters and reports payment via batch upload process.

**Customizing Your Roster- Roster menu**  
Customize your roster to filter results and view specific award statuses based on roster elements.

# WebGrants Tools Templates



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## Tools Center

Home > Tools Center Close Page Instructions

- \* Note:** Systems that have upgraded to Microsoft Office Excel 2007 will encounter a file format error while exporting HTML in Excel format with an extension (xlsm). For best results download the "Template for Excel 2007" to your computer. \*See under "Description" for saving the converted template to your computer.
- Each of these tools involves downloading files that use external software. Some require that additional software be resident on the user's computer
- For best results, right click on the link and select the "Save" option.
- A Users Guide containing further descriptions and instructions for each of these tools is located in the Help Center.

Tool	Description
Roster Data File Compare – Delphi	Provides comparisons between a previous roster data file and the current file.
Excel Grant Roster Template – Excel 2010	* Right-click the link "Excel Grant Roster Template" and select "Save Link As" option to save the template to your computer. Change the name of the file to (.xlsm) and save.
Excel Grant Roster Template – Excel 2013	* Right-click the link "Excel Grant Roster Template" and select "Save Link As" option to save the template to your computer. Change the name of the file to (.xlsm) and save.
Excel Grant Roster Template – Excel 2016 (For use only with 64-byte OS and 64-byte Excel Versions)	* Right-click the link "Excel Grant Roster Template" and select "Save Link As" option to save the template to your computer. Change the name of the file to (.xlsm) and save.
Excel Reconciliation Template – Excel 2010	Formats reconciliation data files into a Microsoft Excel spreadsheet.
Excel Reconciliation Template – Excel 2013	Formats reconciliation data files into a Microsoft Excel spreadsheet.

The *Tools* menu contains CSAC templates that are used to format data onto an Excel spreadsheet:

- In preparation for uploading a datafile; or
- To sort and filter data from a downloaded report

# WebGrants Tools

## Templates

Grant Roster Template- Formats a saved Grant Roster Datafile onto a Microsoft Excel Spreadsheet with labelled column headings

Reconciliation Template- Formats reconciliation data files into a Microsoft Excel spreadsheet in preparation for uploading

EL Verification Template- Allows users to import EL Verification data files to this Excel template. Users can modify the EL of any student on the datafile, and convert the document back to a text file for upload to the Commission

Non-SSN GPA Template- Formats student GPA data in preparation for upload

Unclaimed Awards Template- Formats Unclaimed Award data files. Assists schools in identifying and claiming their attending students

Roster Data File Compare- An electronic tool that provides comparisons between a previous roster data file and the current file

Cal ISIR, MCS Roster, etc.