Navigating WebGrants
Getting Access

Making education beyond high school financially accessible to all Californians.
Getting Started with WebGrants

Complete and submit:

- WebGrants System Administrator’s Access Request Form or User Access Request Form
- Information Security and Confidentiality Agreement

Making education beyond high school financially accessible to all Californians.
WebGrants Access Forms

- 1 Authorized Official
- 2 max System Administrators
  - Immediately grant/disable user access
- User Access Request Form
  - Maintained at school for each user
- Renewed annually by July 31 or with change of staff
- Records to be retained for 3 years
- Complete the Information Security Training

Making education beyond high school financially accessible to all Californians.
Information Security Training

• Complete security training annually

• Must cover the following areas:
  • Information security
  • Privacy
  • Confidentiality

• Must retain training documentation at the institution
Your WebGrants Account

Making education beyond high school financially accessible to all Californians.
Your WebGrants Account

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

**Portal Menu**
- WebGrants
- Table Edit
- User Administration
- CA Dream Act
- SB 70

**Account Information**
- View Your Account Details
- Help With Your Account
Your Account Details

- Keep your personal info up-to-date (phone number, email address)
- Change your password if necessary.
- View who (at your campus) is your System Administrator(s)
If You Are The System Administrator...

You have access to create/change WebGrants User Accounts for your campus

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

**Portal Menu**

- WebGrants
- Table Edit
- User Administration
- CA Dream Act
- SB 70

**Account Information**

- View Your Account Details
- Help With Your Account
User Administration

User Administration Menu

Add New Users
Edit Existing Users
User Access Report
Adding a New User

- User ID must be unique
- All fields marked with (*) are required
- Access cannot exceed 1 calendar year
- User Access Forms must be kept on file
Adding a New User

- Assign access to specific WebGrants screens depending on User role.

- For Example: a User from your fiscal office may only need access to ‘Report Download’, and the Reconciliation screens.
Disabling User Access

- Disable WebGrants access for staff that depart
- Input the date on the “End Date”
WebGrants User Access Report

- View all active & inactive accounts for your campus
- See when each User account will expire (End Date)

<table>
<thead>
<tr>
<th>Rec #</th>
<th>Name</th>
<th>User ID</th>
<th>Start Date</th>
<th>End Date</th>
<th>User Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Dianne Alexander</td>
<td>SA9</td>
<td>6/16/2016</td>
<td>6/16/2018</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Javier Arguello</td>
<td>SA9</td>
<td>1/9/2017</td>
<td>1/9/2020</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Aidee Bucio</td>
<td>SA9</td>
<td>9/30/2016</td>
<td>9/30/2018</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Nai Saeteum</td>
<td>SA9</td>
<td>8/15/2014</td>
<td>8/15/2020</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Adrian Slade</td>
<td>SA9</td>
<td>12/8/2015</td>
<td>12/7/2018</td>
<td></td>
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</tbody>
</table>
Institutional Contacts

- Update or edit institutional contacts when there is a change
- Add new contacts by selecting contact type and clicking on ‘Add’
- Adding a contact on this screen will NOT create a user WebGrants account. The account will still have to be created through the User Admin screen
Change in School Status

Contact the Commission within **10 days** if:

- Shift in control
- Change of school ownership
- School closure
- Addition/loss of additional locations in California
- Cessation of participation in federal programs or 10% rule
- Loss of accreditation
- Changes in personnel of the President/Chief Executive Officer/Chancellor
Best Practice

Renew your access each year
- Set reminders to review user end dates
- Information Security Confidentiality Agreement
- System Administrator Access Request Form

Contact Technology Help Desk for access assistance
- 888-294-0148
- csachelpdesk@csac.ca.gov

Contact Institutional Support for Cal Grant assistance
- 888-294-0153
- schoolsupport@csac.ca.gov
Student Info Screens
Award Summary

- Displays history of a Cal Grant application for individual students
- Hover mouse over many of the fields to see more detail
## Student Award Detail

- Information listed on the FAFSA or CADAA

- View details of award or disqualification by Academic Year

- Shows Competitive Cal A & B Scores

### Student Award Detail Table

<table>
<thead>
<tr>
<th>NEW</th>
<th>Cal Grant A</th>
<th>Cal Grant B</th>
<th>Cal Grant C</th>
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<tbody>
<tr>
<td>School ID/Program Code</td>
<td>00730400 0</td>
<td>00730400 0</td>
<td>00730400 0</td>
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<td>Segment</td>
<td>PR 4Y GR</td>
<td>PR 4Y GR</td>
<td>PR 4Y GR</td>
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<td>Semester/Quarter</td>
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<td>CAL B SCORES</td>
<td>CAL C SCORES</td>
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<td>2.50 / RE-ESTAB</td>
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<td>FULL</td>
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<td>400.00%</td>
<td>200.00%</td>
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<td>PROGRAM EDIT DISQUAL</td>
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Student History

- Each term payment ever reported
- Dollar amounts
- Amount of eligibility used for each payment
- Remaining eligibility

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<th>AW</th>
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<td>04/01/2016</td>
<td>PAY</td>
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</table>
School Info Screens

Making education beyond high school financially accessible to all Californians.
School Info Menu

- Demographics
- Contact Information
- Cost Estimate
- Search
Institution Demographics

[Table with institution demographics]
## Contact Information

<table>
<thead>
<tr>
<th>CHAFEE PROGRAM COORDINATOR</th>
<th>CHAFEE PROGRAM COORDINATOR</th>
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<tr>
<td>First Name*:</td>
<td>First Name*:</td>
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<tr>
<td>Middle Initial:</td>
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<td>Last Name*:</td>
<td>Last Name*:</td>
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<tr>
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<td>Title*:</td>
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<td>Zip Code*:</td>
<td>Zip Code*:</td>
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<td>Comments:</td>
<td>Comments:</td>
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**DIR, ADMISSIONS AND RECORDS**

Phone: 805-922-6666

E-Mail:

Comment:

Last Changed By: **SA01**  Change Date: **09/18/2011**

Maximum of 500 Characters allowed. Current count: 0
### Cost Estimate

<table>
<thead>
<tr>
<th>Title IV School ID#</th>
<th>2017-2018</th>
<th>2016-2017</th>
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<tbody>
<tr>
<td>Program/Course Length</td>
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<td></td>
</tr>
<tr>
<td># of Months/Clock</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hours/Credit Hours</td>
<td></td>
<td></td>
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<tr>
<td>Required Attendance During Academic Year</td>
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<td></td>
</tr>
<tr>
<td>Number of Terms Per Year</td>
<td>3 Quarters</td>
<td>3 Quarters</td>
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<tr>
<td>Term Start Dates</td>
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<tr>
<td>Fall</td>
<td>09/21/2015</td>
<td>09/21/2015</td>
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<tr>
<td>Winter</td>
<td>01/04/2016</td>
<td>01/04/2016</td>
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<tr>
<td>Spring</td>
<td>03/24/2016</td>
<td>03/24/2016</td>
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<tr>
<td>Summer</td>
<td>06/20/2016</td>
<td>06/20/2016</td>
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**Enter 9-Month Budgets for the Following Costs**

<table>
<thead>
<tr>
<th>Tuition</th>
<th>Amount</th>
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<th>$0</th>
<th>$0</th>
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</table>

**Fees**

<table>
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<tr>
<th>Fee Type/Amount</th>
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<th>$</th>
<th>$</th>
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<tr>
<td>Fee Type/Amount</td>
<td></td>
<td></td>
<td>$</td>
<td>$</td>
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</table>

**Total Amount**

| Delete Fees |        | $12804 | $12,804 |
Display Roster
Timing of Rosters

When do we release rosters?
- 2020-21 AY – February 2020
- 2019-20 AY – February 2019

When do students appear on the roster? (by cycle)
- High School Entitlement – after students are claimed
- Transfer Entitlement – immediately after award processing
- Competitive – immediately after award processing
- Cal Grant C – after students are scored
- Renewal – immediately after award processing
Timing of Rosters

What are the next steps?

- Identifying Cal Grant awardees at your campus
- Certify student eligibility
- Collect appropriate verification documents
- Verify any holds or flags
  - Education Level
  - AB 840
Identifying Cal Grant Awardees

Utilize the Award Status Extract Process

- Provides 2 reports:
  - Awarded
  - Not Awarded

Create a batch School Change file for the awarded to ‘claim’ the student on your roster.
Confirmation Required


Total number of records: 1 Total number of pages: 1

Verify ELs as reported

Update all records with custom code

SSN | DOB | Grant ID | Cycle ID | Housing Code | Dep Status | New/Renewal | EL Code | CSAC Budget | EFC | Remain Elig | Forecast Elig | Roster Section
--- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | ---
E1 | 3 | D | N | 1 | 16405 | 64 | .00% | .00% | UNCONFIRMED(6)

Custom Codes: 1 2 3 4 5

School Change Required
School of Attendance Confirmation Required
Payment held, high school verification needed.

High School Grad. Date Verification: Status: Not Verified
Education Level (EL) Verification: Reported EL 1
Verified EL: Status 1 -- Verification Not Required

Fall Term
<table>
<thead>
<tr>
<th>Program Code</th>
<th>Award Type</th>
<th>Annual Award</th>
<th>Term Amount</th>
<th>Adj Amount</th>
<th>Adj Reason</th>
<th>Pay Code</th>
<th>Annual Need</th>
<th>Income &amp; Asset Year Used</th>
<th>Rec Type</th>
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<tbody>
<tr>
<td>B - On Hold</td>
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<td>SC</td>
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<tr>
<td>B - On Hold</td>
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Spring Term
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<th>Adj Reason</th>
<th>Pay Code</th>
<th>Annual Need</th>
<th>Income &amp; Asset Year Used</th>
<th>Rec Type</th>
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</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

Making education beyond high school financially accessible to all Californians.
Display Roster

- Grant ID
- Cycle ID
- Housing
- Dependency Status
- New/Renewal
- Education Level
- CSAC Budget
- EFC
- Remaining Eligibility

- Roster Section
- Flags
- Terms
- Program Code
- Award Type
- Annual Award
- Term Award

**NEW!**

- TANF Eligibility
- Foster Youth (Cal Grant B)
- Students with Dependent Children
Display Roster

- Remaining Eligibility: 700%
- Forecast Eligibility: 100% annual projected use (semester system)

Cycle ID: E1, E2, C1
1- On Campus
2- With Parents
3- Off campus

Housing Code

Dependancy Status
N- New
R- Renewal

Education Level

TANF flag

“View History” links to ‘Student (Payment) History’ screen

Eligible Section

Custom Codes
1 2 3 4 5

SSN  DOB  Grant ID  Cycle ID  Housing Code  Dep Status  New / Renewal  EL Code  TANF  FOSTER YOUTH  CSAC Budget  EFC  Remain Elig  Forecast Elig  Roster Section

Education Level (EL) Verification

Reported EL 1
Verified EL

Status 1 -- Verification Not Required

High School Grad. Date Verification
Status: Verified by STDT
Verify As: Yes - Graduated on 05/2018
New Grad Date: Jan 2018

(High School Grad. Date Verification through CSAC) Request By:
- Student
- High School
- College
- CSAC

Education Level (EL) Verification

Fall Term
Adj Reason Codes
Pay Status Codes
Delete Txn

Program Code  Award Type  Award Amount  Term Amount  Adj Amount  Adj Reason  Pay Code  Annual Need  Income & Asset Year Used  Rec Type
Totals  $7,414  $0  17156  2018

B-FY  T/F  $5,742  $0  0  LA  LA  PAY

B-FY  ACSS  $1,672  $0  0  LA  LA  PAY
## Grant Roster Data File

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<td>D</td>
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<th>CSAC Budget Amount</th>
<th>EFC Amount</th>
<th>Need</th>
<th>Adjusted Need</th>
<th>Remaining Eligibility</th>
<th>Forecasted AY Eligibility</th>
<th>Annual Award</th>
<th>Annual Tuition/ Fee Amount</th>
<th>Annual Access Amount</th>
<th>Annual Books &amp; Supplies Amount</th>
<th>Fall Total Amount</th>
<th>Fall Tuition/ Fee Amount</th>
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</tbody>
</table>

Making education beyond high school financially accessible to all Californians.
Grant Roster Data File

- Report payments using batch upload process
Customizing Your Roster
Customizing Your Roster

Customize your roster to filter results, and view specific award statuses based on:

- **Cycle**: Entitlement/Competitive
- **Cal Grant Type**: A, B, C
- **Award Type**: T/F, Access, B/S
- **Housing Type**
- **Dependency Status**
- **New/Renewal**
- **EL**: 1-4
- **Holds/Flags**: EL, E1/E2
- **CADAA applicants**
- **Foster Youth**
- **Paid/Unpaid**
- **Transaction Codes**: FI, LA, IG, NP, NS, etc.

[Website interface showing options for Customizing Your Roster]
Customizing Your Roster

Customize Roster

- The following is a list of your roster formats.
- The CSAC Standard Roster format cannot be changed or deleted.
- Existing roster formats can be copied, edited and renamed.
- 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.

<table>
<thead>
<tr>
<th>Row #</th>
<th>Name</th>
<th>Preferred Format</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>CSAC Standard Roster</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Customizing Your Roster

Roster Format

Select

- Data Elements Available
- Click and highlight each data element that you want to display on your roster.
- For multiple selections, click on the first element and then hold down the CTRL key to select additional elements.
- Once items are highlighted, click on "Add Data Elements".
- The "Data Elements Selected" box will display the column headings that will display on your roster.
- "Remove Data Elements" will remove the selected elements from your selection list.
- Use the "Move Up" and "Move Down" to order the individual column headings for display.
- After selecting data elements, click "Continue" to choose sort options.

Data Elements Available

Data Elements Selected

Data Elements

Sort Order Preferences

Sort Options

Save Roster Format
Customizing Your Roster

Be sure to save all entries before exiting the Roster or changes will be lost.

Please note that Leave of Absence (LA) payment transactions for newly awarded Competitive Cal Grant students will not be accepted. Only student initiated LA transactions will be accepted via WebGrants for Students or by contacting CSAC.
Questions?