Navigating WebGrants

Making education beyond high school financially accessible to all Californians.

Getting Access

How do we get started with WebGrants?

Getting Started with WebGrants

Complete and submit:

- WebGrants System Access Form
- Information Security and Confidentiality Agreement

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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

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
Your WebGrants 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
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)

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 History

- Each term payment ever reported.
- Dollar amounts.
- Amount of eligibility used for each payment.
- Remaining eligibility.
School Info Screens

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School Info Menu

School Info Menu

Demographics
Contact Information
Cost Estimate
Search

Institution Demographics
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

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

Display Roster

- Remaining Eligibility: 100%
- Forecast Eligibility: 100%
- Annual projected use (semester system)
- TANF flag
- FY flag

Display Roster

- Education Level (EL) Verification
  - Required: 1, Verified: EL
  - Rules: 1, Verification Not Required

- Program Code
- Award Type
- Annual: Term
- Award Amount
- Award Balance
- Annual Award
- Income: Type
- Income: Value
- Income: Required
- Income: Code
- Income: Total
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/Renewed

- EL: 1-4
- Hold/Flag: EL, E1/E2
- CADAA applicants
- Foster Youth
- Paid/Unpaid
- Transaction Codes: FI, LA, IG, NP, NS, etc.

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Questions?