2014-2015 California Middle Class Scholarship (MCS) Web Application

ENROLLMENT FILE UPLOAD AND REPORT DOWNLOAD USER GUIDE

The target audience for this user guide is individuals who utilize the CA Middle Class Scholarship web application interface to upload their import specification.

CALIFORNIA STUDENT AID COMMISSION

TABLE OF CONTENTS

Revision History **2**

Introduction **3**

MCS Enrollment File Uploading Guidelines **5**

MCS Report Download Guidelines **17**

REVISION HISTORY

Date	Version #	Document Change
06/04/2014	.01	Draft version created.
06/05/2014	.02	Draft version sent for review.
06/17/2014	.03	Draft version sent for review to stakeholders.
06/20/2014	.04	Draft version sent for review to UC and CSU Campuses
07/21/2014	.05	Updated to reflect budget bill language

INTRODUCTION

This user guide contains all essential information for the reader to understand the ***MCS Enrollment File*** upload and report download process for the 2014-2015 version of the MCS web application.

The purpose of the guide is to describe the functions and include supporting graphics to depict the end-user's interaction and the application's behavior that had been available on July 1, 2014. Due to modifications required by Senate Bill 860, it will be available August 19, 2014.

1.1 SCOPE

The scope of the document is a high-level overview of the features that have been developed and deployed with this version of the software release. This document is not a comprehensive user manual. This document is not intended to supersede any of the processes, procedures and/or policies that are currently in place for the MCS program.

1.2 SYSTEM REQUIREMENTS

The web application is designed for use with the following web browsers:

- Microsoft Internet Explorer version 10.0 or higher
- Mozilla Firefox version 29.0.1 or higher
- Google Chrome version 35.0.1916.114 or higher
- Apple Safari version 5.1.9 or higher

The computer should also meet the minimum system requirements provided by the manufacturer of the browser being used. The web application will perform best on computers with a high-speed internet connection similar to Digital Subscriber Line (DSL), cable, or faster. It is not recommended for use with computers using dial-up modem based internet connection.

Note: The ***MCS Enrollment File*** **must** be a fixed field length text file with an encoding of **ANSI** and shall **not** exceed 25MB.

1.3 ACCESSIBILITY REQUIREMENTS

To access the MCS web application you **must** have a WebGrants user account. If you do **not** have a WebGrants user account contact your *School Administrator*. If your school does not have a S*chool Administrator* contact the CSAC Help Desk at 1-888-294-0148 or by email at: csachelpdesk@csac.ca.gov to request an account.

MCS ENROLLMENT FILE UPLOADING GUIDELINES

1.1.INTRODUCTION

The second phase of the MCS process requires the transmission of student enrollment data to CSAC through the WebGrants system. The financial aid eligibility data included in the enrollment files will allow CSAC to determine the maximum MCS award amounts.

By July 1, UC and CSU campuses should have the majority of confirmed enrollment for new and continuing students for the next academic year. On an annual basis, the initial reporting period for the *MCS Enrollment File* is from July 1st to July 15th to report these students. (Note: For the 2014-15 year, the MCS Enrollment file period is from August 19 to September 2.)

After the initial upload period ends on July 15, the MCS file upload capability will be temporarily closed while the data is being processed and award determinations are made by CSAC. Around August 1, CSAC will make its initial MCS award offers for that academic year. (Note: For the 2014-15 year, CSAC will make its initial MCS award offers around September 15 due to the later enrollment filing period.)

After this timeframe, MCS Enrollment files can be uploaded on a daily basis for updates to previously submitted students or to add new students. CSAC will process the uploaded enrollment files every Friday night and update all MCS records the following week.

1.1.1. ASSUMPTIONS:

To complete the process of uploading an MCS Enrollment file the following assumption have been made:

- The reporting individual has a valid WebGrants user account
- The reporting individual has access to the MCS menu
- The reporting individual has valid MCS Data to report
- The reporting individual has a valid MCS Enrollment File to upload*

**A copy of the MCS Enrollment File Layout is found at the end of this guide.*

1.2. MCS FILE ELEMENTS AND PROCESSING

As campuses prepare and create their MCS Enrollment file for the upload, the following sections below provide guidance on which students should be included on the file.

New and continuing undergraduate students:

1. who are resident students with total income of $150,000 or less
2. who are AB540 approved with total income of $150,000 or less
3. who have a completed Financial Aid Application (FAFSA or Dream Application) with valid EFC
4. who have been awarded or packaged with financial aid and/or
5. who have not been awarded due **to incomplete or pending verification**:
    - These students are marked with a "5" on field 9 on enrollment file
    - Blank EFC students should be included. Use spaces for the Total Income field. This record will reject and appear on the ***MCS Enrollment Process Eligibility Summary Report (page 14).***
    - Once verification is complete, the school should resubmit the updated information for the student in another enrollment file for MCS consideration.
6. who are meeting satisfactory academic progress requirements to receive financial aid

Transfer Students

Meet requirements 1-6 above. Incoming transfer students should be marked appropriately on field 9 of the Enrollment File with the expected term in which they will start. However, full year values are required on the Enrollment file for Total Income, Federal Aid, Institutional Grants and fee waivers, and State Aid to determine the student's MCS award. If the student meets MCS eligibility requirements, their MCS award will reflect only the terms they are planning to attend as indicated by the campus in field 9.

EXAMPLE:

- Spring Transfer at a semester campus flagged with value of "4" on field 9
- Full year Pell Grant of $2,000 ($1,000 – Fall, $1,000 – Spring)
- Report $2,000 instead of the $1,000 scheduled for Spring

Limited Eligibility Students

Meet requirements 1-6 above. Campuses should only provide the actual award amounts for students who have limited eligibility for Federal Aid, State Aid or Institutional Grants and fee waivers on the enrollment file. Full year values should be reported for the other appropriate

fields. Cal Grant award information is not required on the "State Aid" category as CSAC will validate this information.

Enrollment File Aid Programs

Senate Bill 860 signed June 20, 2014 amended the California Education Code {Sec.4, section 70022, Sec.5.section 70023} on MCS from "institutional need based-grant" language to institutionally administered grants or fee waivers." Please use the following lists below to correctly report aid programs to their appropriate category:

Field 16, Federal Aid: (Formerly Student Pell Grant award)

- Pell Grant
- FSEOG
- Teach Grant
- BIA Grants

Field 17, Institutional Grants and fee waivers: (Formerly Institutional Need-based grants)

- Need-based grants
- Merit based scholarships, including athletic scholarships, **the portion of which** is specifically designated for tuition and fees
- Mandatory fee waivers such as Alan Pattee
- Veteran's benefits designated for mandatory system wide tuition and fees
- Other fee waivers (Vocational rehabilitation, employee tuition assistance, etc)
- EOP
- Institutionally administered scholarships specifically designated for fees

Field 18, State aid: (Formerly labeled as Student's Cal Grant award)

- Chafee Grant
- Child Development Grant
- LEPD
- National Guard

Note: Cal Grants are considered when determining MCS eligibility but are not reported by the school, CSAC plugs in Cal Grant awards.

Sources that are not to be considered:

- The portion of institutional scholarships & veteran's awards (e.g. stipends, awards for other expenses) awarded on a basis other than need and not designated for tuition and fees
- Private scholarships

Also, if a student is listed on the enrollment file for more than one school, CSAC will process the first school that is received. If the student is found eligible at the first school, any subsequent submissions by other campuses will not process. The student record will appear as pended on the ***MCS Enrollment Process Eligibility Summary Report .*** The following table has some other common scenarios that could occur during the initial enrollment file uploads with the corresponding outcomes.

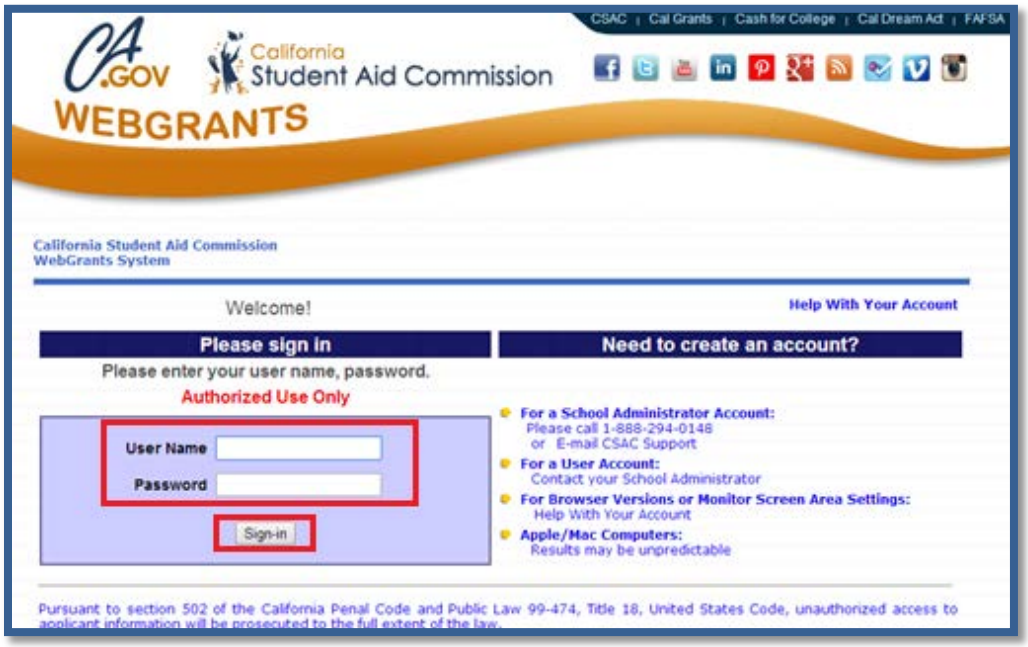
Scenario	Category	Outcome
The same school submits more than one enrollment record for the same student.	Multiple Enrollment Files by same school	Only the last record uploaded is retained.
School A uploads an enrollment record (eligible) and then school B uploads a record for the same student (eligible).	Multiple Enrollment Files by different schools	School B's record will be pended.
School A uploads an enrollment record (ineligible) and then school B uploads a record for the same student.	Multiple Enrollment Files by different schools	School B's eligibility determination is not dependent on School A's prior upload.
School A uploads an enrollment record (eligible) and school B uploads an enrollment record for the same student (also eligible but pended since not first school). Then school A uploads an enrollment record (ineligible).	Multiple Enrollment Files by different schools	School B's record will be updated to eligible (and not pended) so that it will be the record used during the award process.

Data for students starting in terms beyond the fall term, or who were just determined eligible by the school can be added to later enrollment files.

Remember that actual MCS payments will be reported using the MCS payment file. Instruction and guidance on the payment file process will be provided in about a month.

1.3. UPLOADING THE MCS ENROLLMENT FILE:

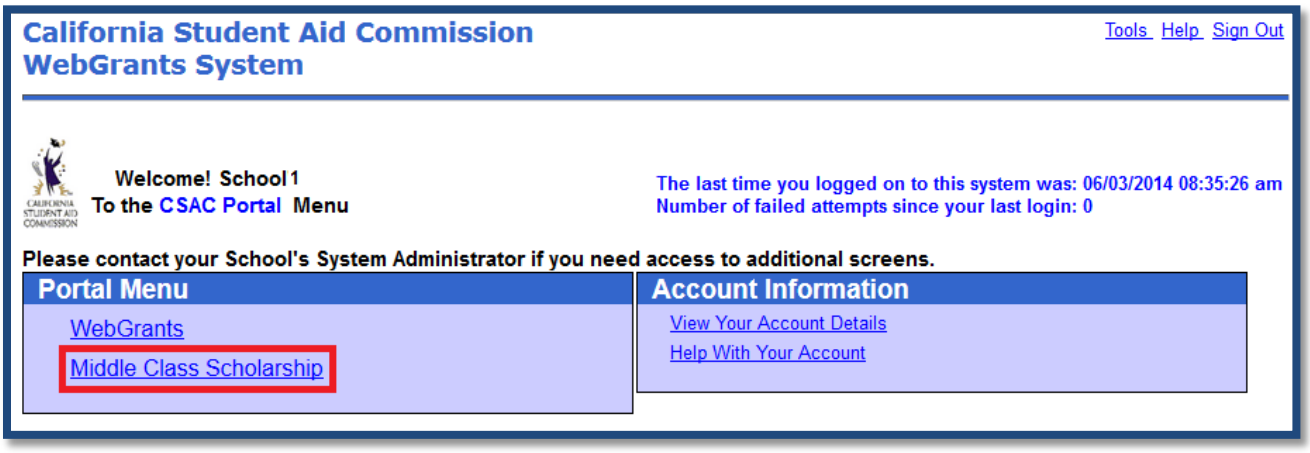
1. Navigate to the WebGrants System login page.
   - This is the entry point through which all authorized users can access the WebGrants application.
2. Enter the ***User Name*** and ***Password*** and select the the ***Sign-in*** button.



Screen 1 – WebGrants System – Login

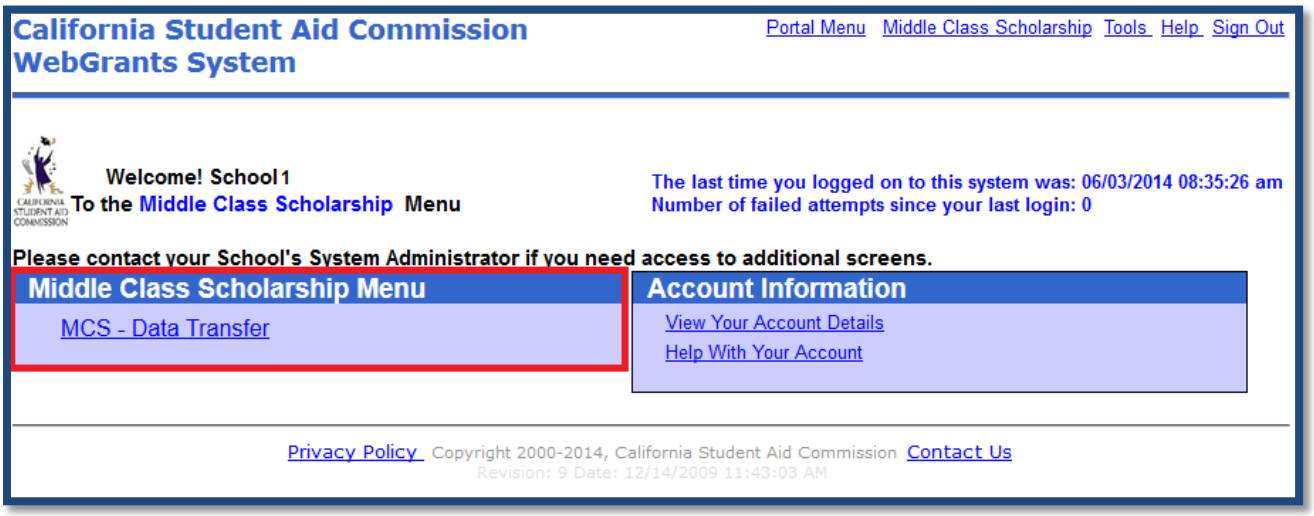
3. The system will display the ***CSAC Portal Menu*** screen upon successfully authenticating the login credentials.
   - **Note:** Depending on the profile authorization there may be more options available in the ***CSAC Portal Menu***.

4. Select the ***Middle Class Scholarship*** menu selection.



Screen 2 – WebGrants System – CSAC Portal Menu

5. The system will display the ***Middle Class Scholarship Menu*** screen.



Screen 3 – WebGrants System – Middle Class Scholarship Menu

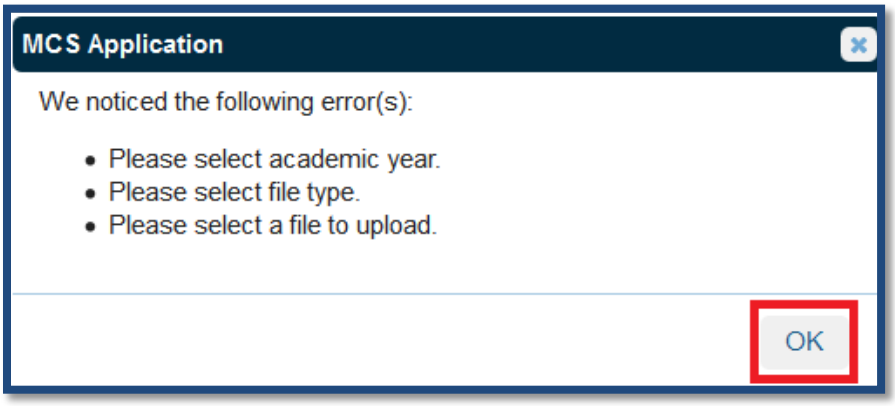
6. Select the ***MCS – Data Transfer*** menu selection.
7. The system will display the ***MCS – Data Transfer Menu*** screen.
8. Select the ***File Upload*** menu selection.

Screen 4 – MCS - Data Transfer Menu

9. The system will display the ***MCS File Upload*** screen
10. If requested, enter the ***School ID***, select the ***Academic Year*** and select the ***File Type.***
11. Select the ***File*** to upload by selecting the ***Browse*** button.
12. Select the ***Upload*** button.

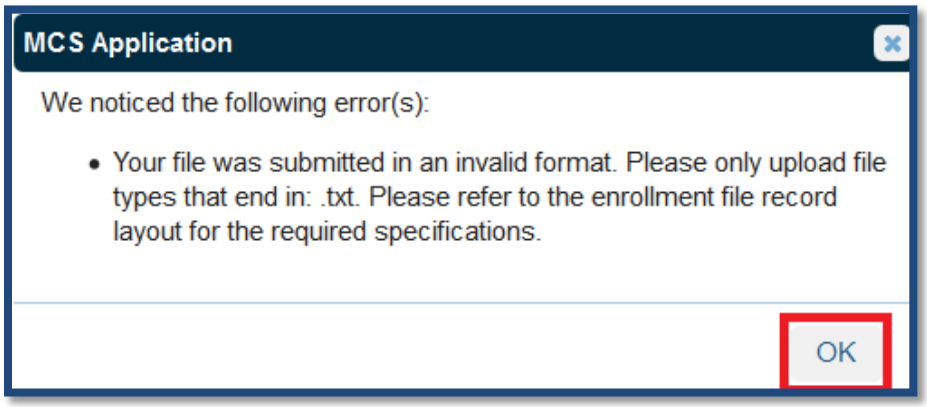
Screen 5 – MCS – File Upload Screen

13. If the ***Academic Year***, ***File Type***, and ***File*** are not selected, the system will display an exception message.
14. Select the ***OK*** button.
15. The system will display the ***MCS File Upload*** screen.
16. Select the ***Academic Year***, ***File Type*** and ***File*** to upload.



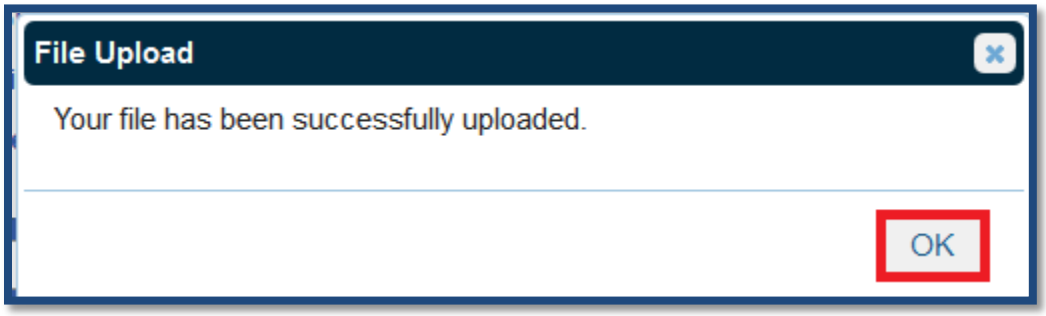
Screen 6 – MCS – File Upload – File Upload Exception Message

17. If the file type does not comply with file format requirements, the system will display an exception message.
    - **Note:** The file format **must** be a **fixed field length text file** with an encoding of **ANSI** and shall **not** exceed 25MB
18. Select the ***OK*** button.
19. The system will display the ***MCS File Upload*** screen.
20. Correct the ***File Format*** so that it complies with the requirements.
21. Select the corrected file to re-upload.



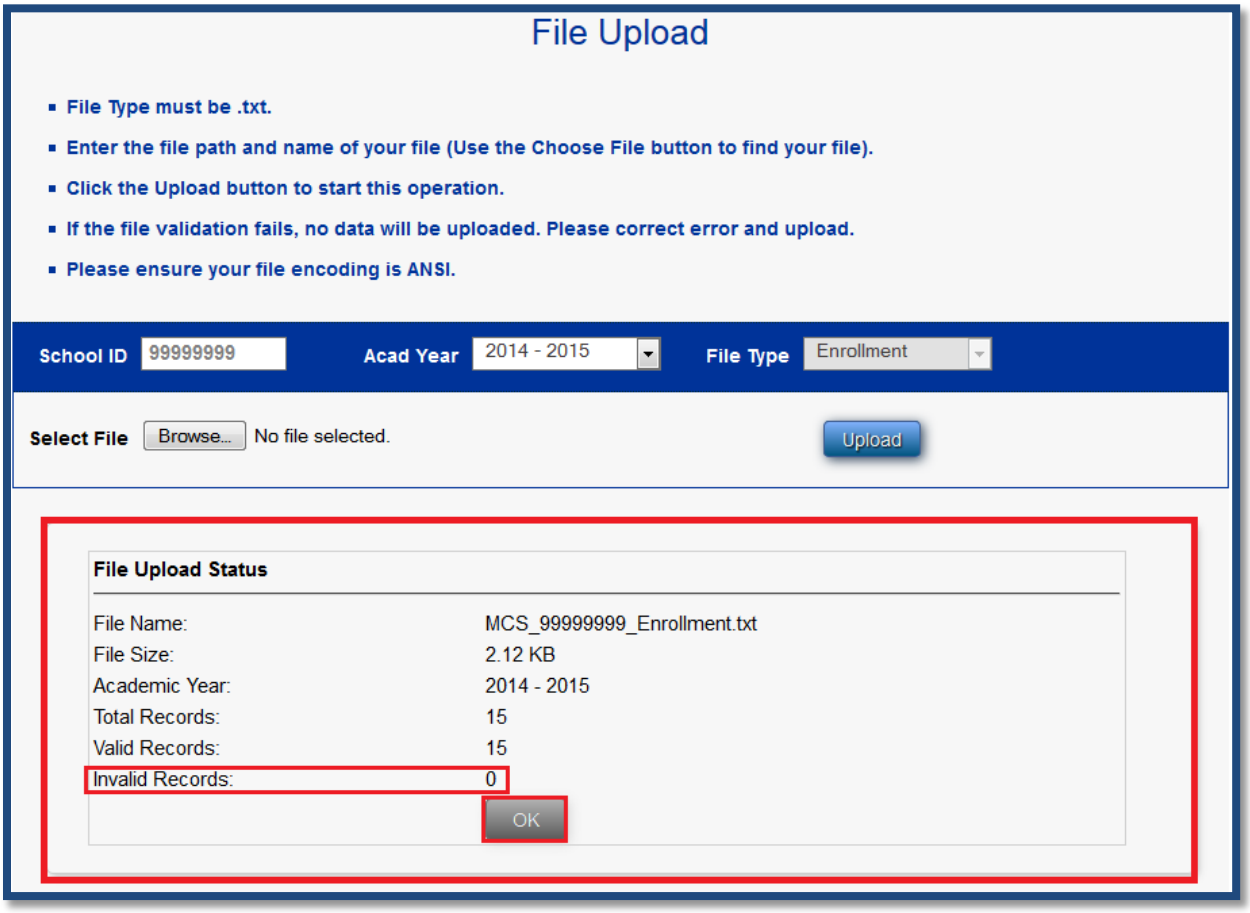
Screen 7 – MCS – File Upload – File Format Exception Message

22. If the file passes the file format validation, the system will display the ***MCS Successful Upload*** dialogue box.
23. Select the ***OK*** button.



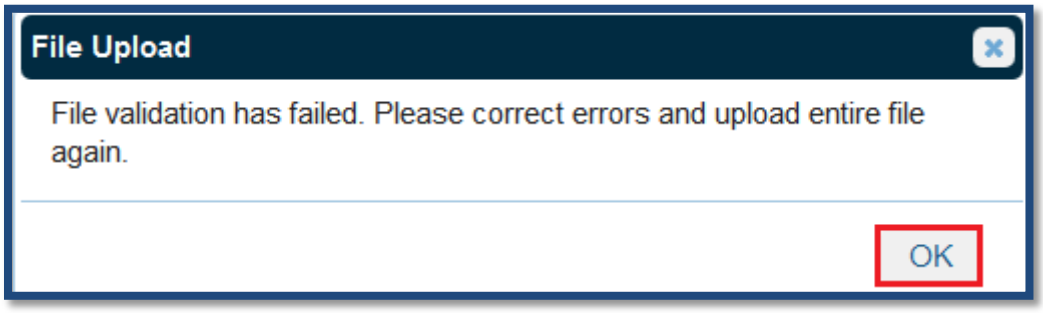
Screen 8 – MCS – File Upload – Successful Upload Message

24. The system will display the ***MCS File Upload Status*** embedded panel which provides a high level overview of the file status.
    - **Note:** There are no invalid records for this file.



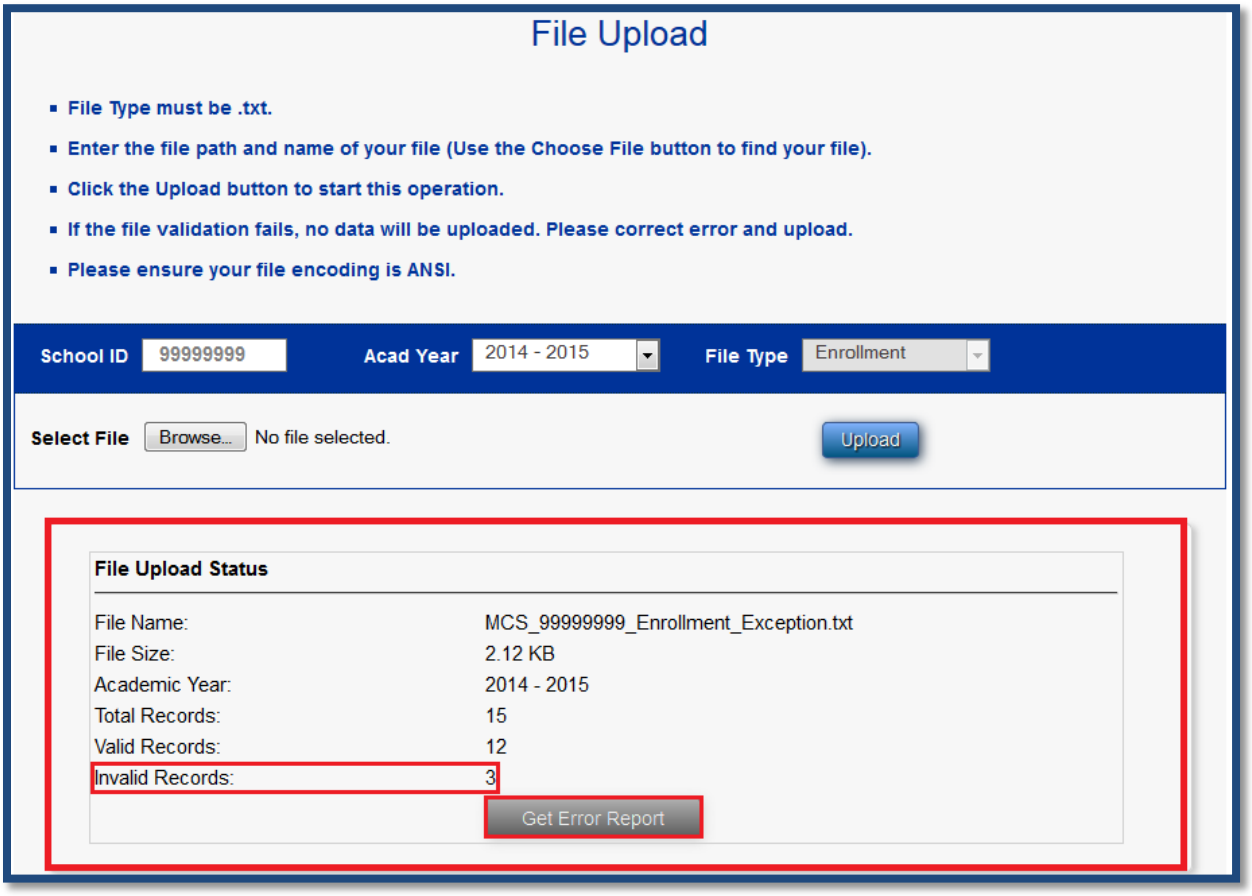
Screen 9 – MCS – File Upload – Successful Upload – File Upload Status

25. If the file fails field level validation, the system will reject the file and display an exception message.
    - **Note:** The file **must** be corrected and the **entire file** must be **uploaded** again.
26. Select the ***OK*** button.



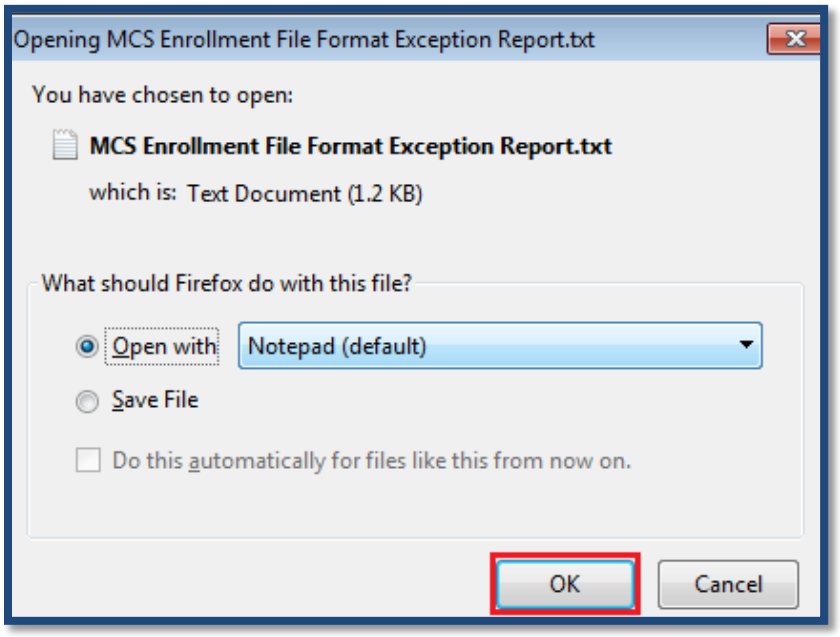
Screen 10 – MCS – File Upload – Validation Failure Exception Message

27. The system will display the ***File Upload Status*** embedded panel which provides a high level overview of the file status.
28. Review the file status details.
29. The system will display the ***Get Error Report*** button **only** when invalid records are discovered in the file.
30. Select the ***Get Error Report*** button.



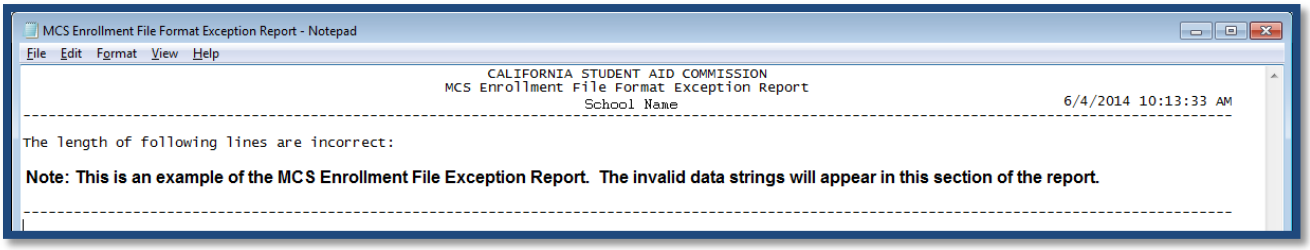
Screen 11 – MCS – File Upload – File Upload Status – Invalid Records

31. The system will display the ***MCS Enrollment File Format Exception Report*** dialogue box.
32. Select the ***OK*** button.



Screen 12 – MCS – File Upload – Validation Error Report Dialogue Box

33. The system will display the ***MCS Enrollment File Format Exception Report*** which provides the details of the errors for each of the invalid records.
34. Correct the invalid records in the file and resubmit the **entire** file.



Screen 13 – MCS – File Upload – Validation Error Report

MCS REPORT DOWNLOAD GUIDELINES

2.1 INTRODUCTION

After the first week of the initial reporting period for the ***MCS Enrollment File,*** the ***MCS Enrollment Process Eligibility Summary*** report will be available to view and download for each successfully uploaded file. The report provides a summary of the data processed in their ***MCS Enrollment***. Each file is processed on a weekly basis and once the processing is complete the ***MCS Enrollment Process Eligibility Summary*** will be made available.

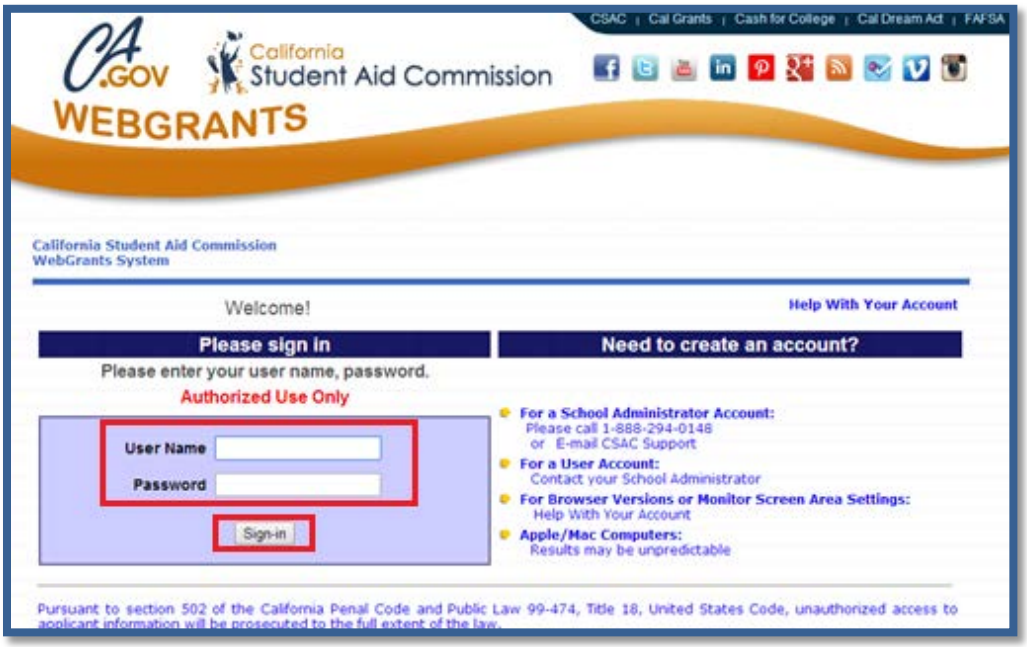
2.1.1 ASSUMPTIONS:

To complete the process of downloading the ***MCS Enrollment Process Eligibility Summary*** report, the following assumptions have been made:

- The individual retrieving the report has a valid WebGrants user account.
- The individual retrieving the report has access to the MCS menu.
- A valid ***MCS Enrollment File*** has been uploaded for the institution.
- The valid ***MCS Enrollment File*** was uploaded a week prior to attempting to retrieve the report.

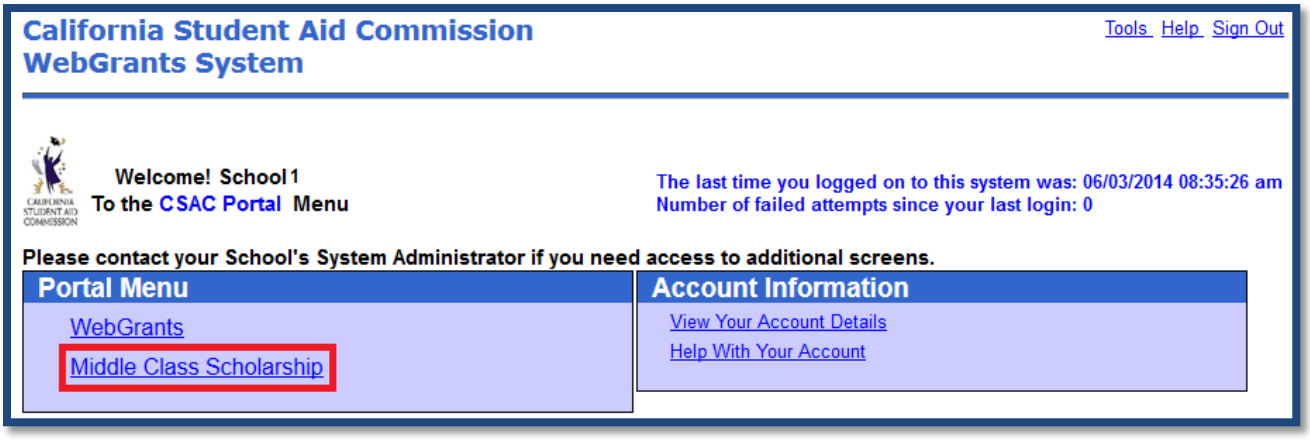
2.2 DOWNLOADING THE MCS ENROLLMENT PROCESS ELIGIBILITY SUMMARY:

1. Navigate to the WebGrants System login page.
   - This is the entry point through which all authorized user can access the WebGrants application.
2. Enter the ***User Name*** and ***Password*** and select the the ***Sign-in*** button.



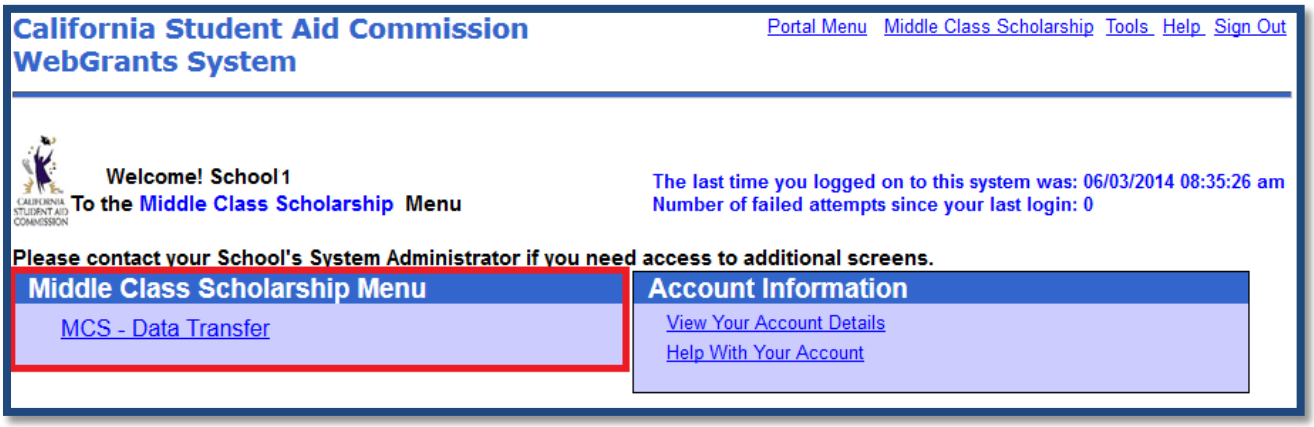
Screen 1 – WebGrants System – Login

3. The system will display the ***CSAC Portal Menu*** screen upon successfully authenticating the login credentials.
   - **Note:** Depending on the profile authorization there may be more options available in the CSAC Portal Menu.
4. Select the ***Middle Class Scholarship*** menu option.



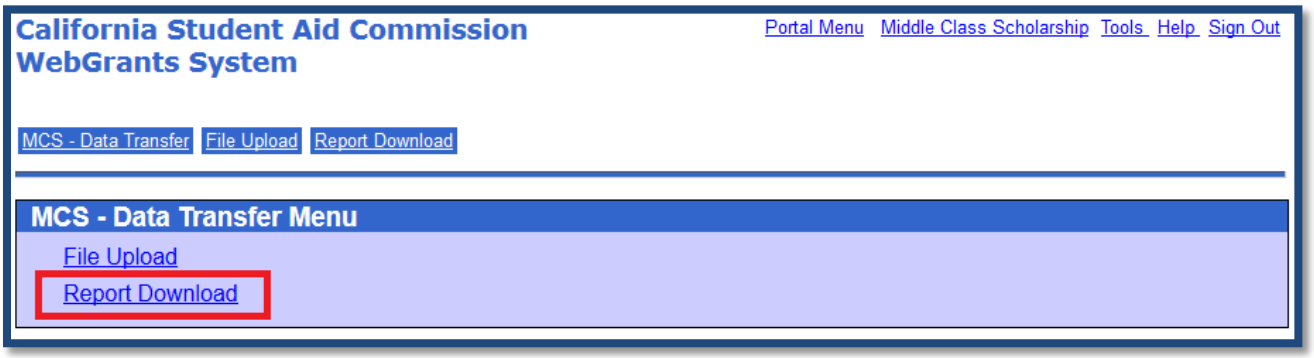
Screen 2 – WebGrants System – CSAC Portal Menu

5. The system will display the ***Middle Class Scholarship Menu*** screen.
6. Select the ***MCS – Data Transfer*** menu selection.



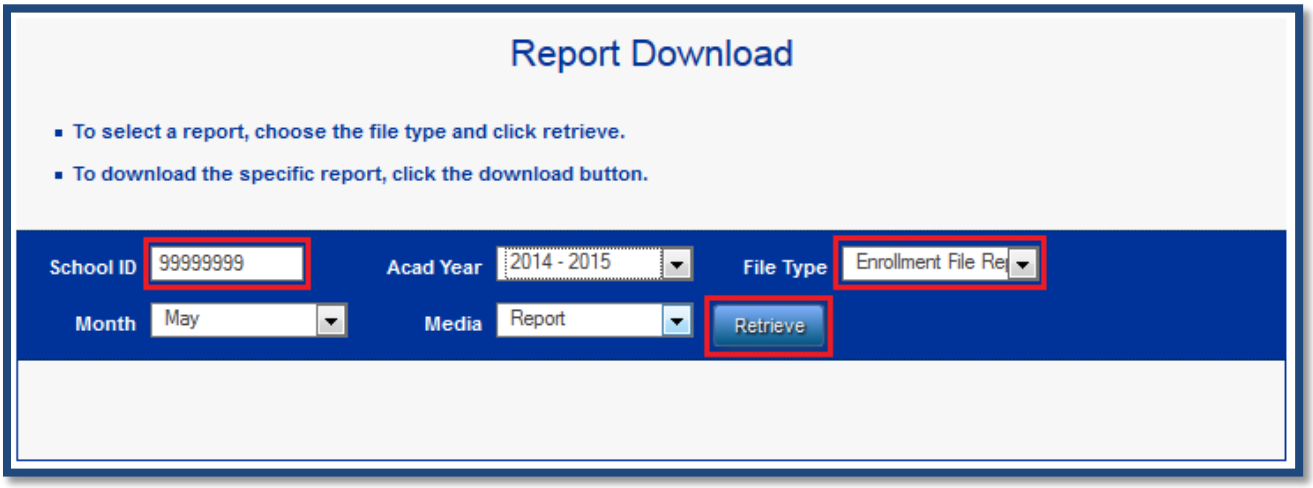
Screen 3 – WebGrants System – Middle Class Scholarship Menu

7. The system will display the ***MCS – Data Transfer Menu*** screen.
8. Select the ***Report Download*** menu selection.



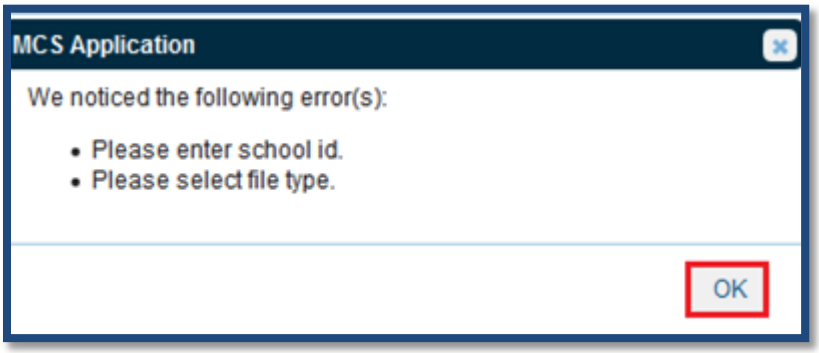
Screen 4 – MCS - Data Transfer Menu

9. The system will display the ***MCS Report Download*** screen
10. Enter the ***School ID*** and select the ***File Type*** from the drop down menu.
    - **Note:** The ***Academic Year*** field is defaulted to the current year, the ***Month*** field is defaulted to the current month and the ***Media Type*** is defaulted to ***Report***.
11. Select the ***Retrieve*** button.



Screen 14 – MCS – Report Download Screen

12. If the ***School ID*** and ***File Type*** are not selected the system will display an exception message.
13. Select the ***OK*** button.
14. The system will display the ***MCS Report Download*** screen.

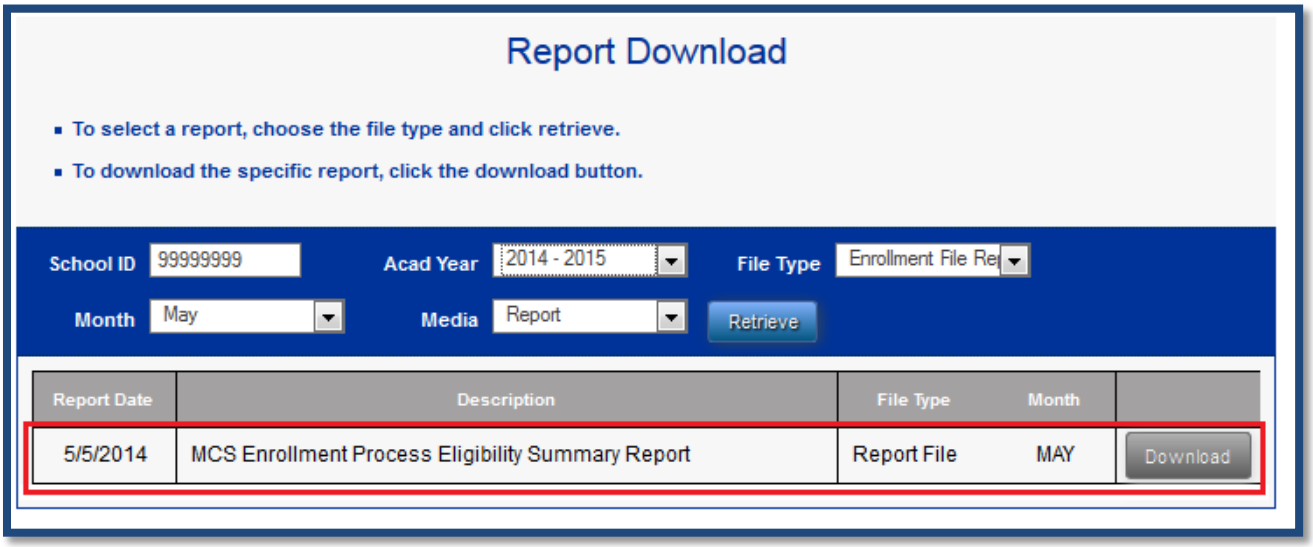


Screen 15 – MCS – Report Download –Exception Message

15. If there is no data to report, the system will display an exception message.
16. Select the ***OK*** button.
17. The system will display the ***MCS Report Download*** screen.

Screen 16 – MCS – Report Download – No Data Found Exception Message

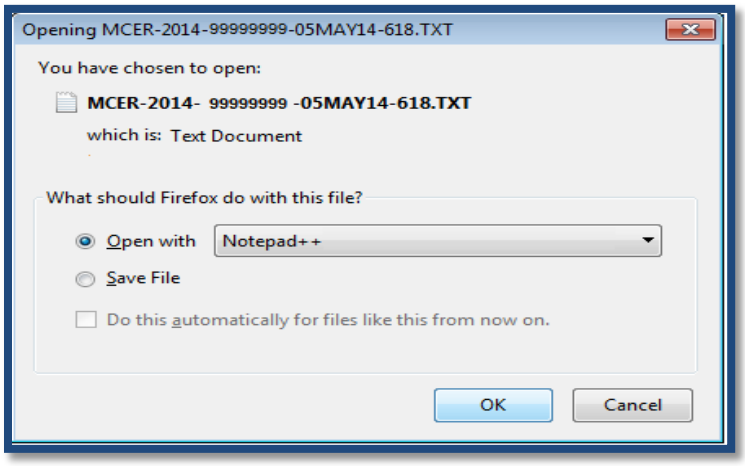
18. If there is data to report and the ***Report Download*** field entries are valid, the system will display the ***MCS Enrollment Process Eligibility Summary Report*** in an embedded panel.
    - **Note:** If multiple files were submitted, there will be multiple reports contained within the embedded panel which will be sorted by *Report Date.*
19. To review the content in the report select the ***Download*** button.



Screen 17 – MCS – Report Download – MCS Enrollment Process Eligibility Summary Report

20. The system will display the ***MCS Enrollment Process Eligibility Summary Report*** dialogue box.

21. Select the ***OK*** button.



Screen 18 – MCS - Report Download – MCS Enrollment Process Eligibility Summary Report Dialogue Box

22. The system will display the ***MCS Enrollment Process Eligibility Summary Report*** which provides the summary details of the records submitted in the ***MCS Enrollment File***.

```
00114322014200030801BRIDGE          LEO         D19940805501 LBRIDGE.30801@CSAC.CA.GOV                    3100010139200000000000000000000000
Ineligible - Incomplete Verification

00114322014200046167KIDD            ANTHONY     M19950231501 AKIDD.46167@CSAC.CA.GOV                      2100010000000000000000000000000000
Rejected - Invalid Date of Birth: 19950231
Ineligible - Incomplete Verification

00114312014200078233SAWYER          RYAN        K19920102101 RSAWYER.78233@CSAC.CA.GOV                    5100016018900000000000000000000000
Rejected - Invalid Term Type: 1
Ineligible - Total Income Exceeds Limit: 000160189

---------------------------------------------------------------------
Summary Information
---------------------------------------------------------------------
Total Number      Eligible       Rejected       Ineligible     Pended
of Records        Records        Records        Records        Records
---------------------------------------------------------------------
      21             13              5              3              0
---------------------------------------------------------------------

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.
```

Screen 19 – MCS - Report Download – MCS Enrollment Process Eligibility Summary Report

The *MCS Enrollment Process Eligibility Summary Report* includes the following report definition at the bottom of the report:

- 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.

REFERENCE INFORMATION

For more information visit the *Middle Class Scholarship Information* webpage on the California Student Aid Commission website.

http://www.csac.ca.gov/doc.asp?id=1481