CALIFORNIA STUDENT AID COMMISSION

PROGRAM ADMINISTRATION & SERVICES DIVISION

MEMORANDUM

March 30, 2015

TO: University of California Financial Aid Directors
               California State University Financial Aid Directors

FROM: Catalina G. Mistler *Catalina G. Mistler*
               Chief, Program Administration & Services Division

SUBJECT: 2015-16 Middle Class Scholarship – Admission Files

This memorandum provides information on the Middle Class Scholarship (MCS) eligibility/award determination and data submission/file upload processes for the 2015-16 academic year. The submission of MCS data to the California Student Aid Commission (Commission) begins April 1, 2015. The record layout for the admission/enrollment file is enclosed with this memorandum.

Eligibility Determination

The MCS program provides a scholarship for new and continuing undergraduate students with family incomes up to $150,000 attending the University of California (UC) or the California State University (CSU) who are not already receiving federal, state or institutional grants that exceed 40% of the charged mandatory system-wide tuition/fee amount. The legislation authorizing the MCS establishes a phase in of the awards over four years. Second year funding allows an award maximum of 50% of 40% of the charged tuition/fees, resulting in MCS awards reduced to a maximum of 20% of the charged fees in 2015-16.

Maximum Award Determination

Despite a statutorily defined award maximum, the actual award amounts for the MCS program, based on appropriated funding, may be less than the authorized maximum. To set the actual maximum, several factors will be used, including the following:

1. The student's total family income as taken from the Total Income figure displayed on the student's federal ISIR or Cal ISIR.
2. The total amount of a student's pertinent federal, state and institutional grant awards.
3. The total number of MCS eligible students.
4. The budget appropriation in a given award year. Second year total program funding is set at $152 million.
5. The anticipated maximum award for the UC in the 2015-16 year is $2,436.
6. The anticipated maximum award for the CSU in the 2015-16 year is $1,092.

Data Submission Phases

MCS record layouts (created in collaboration with the UC and CSU system offices) allow the Commission to gather the student specific financial aid award data needed to set the maximum awards. These are student specific records since not all students will receive the same amount of qualifying grants and scholarships.

The submission of student specific data is made in three phases:

1. **Admission file submission:** The campus provides specific information (see record layout comments) for new undergraduate students who have been admitted to the University as well as continuing undergraduate students. The Commission uses these files to model the award selection for budget projection purposes and to notify students of potential eligibility for an award. This initial correspondence to the student (developed with input from the segmental offices and campuses), indicates the student may be eligible for the MCS program and explains that the Commission will notify the student and the school in late July 2015 if the student is awarded an MCS. All MCS data uploads must be submitted through WebGrants. The admission file submission occurs annually on April 1.

2. **Enrollment file submission:** The campus provides specific information (see record layout comments) for new and continuing enrolled undergraduate students to the Commission. The campus includes the student's financial information and the ISIR or Cal ISIR number used in providing the data. The Commission uses this information to calculate the maximum award values and to determine the amount of funds to "hold back". Once the Commission has determined the student's award amounts, an award notification is sent to the student. A Payment file is created and posted for campuses in WebGrants. Initial fall enrollment data uploads are required by July 15, 2015. Enrollment file submissions for students initially missed for fall and those enrolling first time for the winter or spring terms occur at a later time.

3. **Payment file submission:** The MCS payment process is similar to the Cal Grant payment process. Campuses certify student attendance and eligibility, and request funds for each term. Upon reconciliation of the payment file, the Commission submits a claim to the State Controller's Office to process an EFT payment to the campus for disbursement of the MCS award. Payment file submissions are accepted on a weekly basis. Payments are processed by term. Payment files are processed beginning in August contingent on budget enactment for the 2015-16 award year.

File Upload Process

The admission, enrollment and payment files use the existing file upload process in WebGrants. The System Administrators (SA) for each UC and CSU campus have access to the Middle Class Scholarship link on the home portal in WebGrants. The SA's can grant access to any of their campus WebGrants users.

Upon submission of each file, the campus is notified if the file was accepted or rejected:

- If the file is accepted, the campus is able to view a report that indicates the number of records accepted, validated and rejected.

- If a record is rejected, the reason for the rejection is provided. The campus should review the reason and correct any invalid information and resubmit only the corrected information (do not resubmit the entire file).

All corrections to admission file records must be completed by April 10, 2015.

If you have any questions regarding the information in this memo, please contact the Commission's Institutional Support at schoolsupport@csac.ca.gov or at (888) 294-0153.

Enclosures: 2015-2016 Admission/Enrollment MCS Record Layout