



# User Reference Guide

## WebGrants 4 Students *Updating Profile Information*

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## COURSE OVERVIEW

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### What is Profile Information?

Within Web Grants 4 Students there is a profile information section. In this section the student will be able to view and directly update their contact information, and 3<sup>rd</sup> party representative information. Students will also be able to view their demographic information.

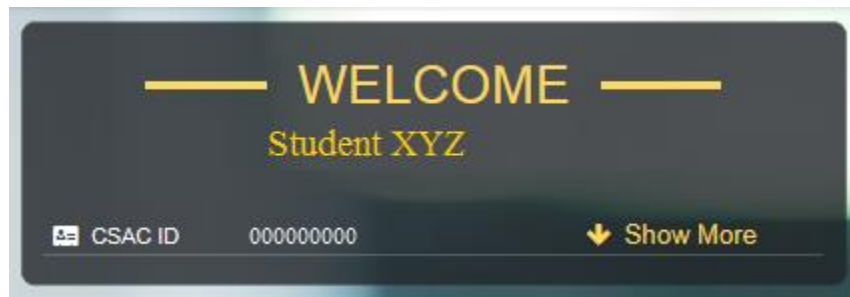
## 1 UPDATING PROFILE INFORMATION

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Lesson Objectives:

- The student will learn how to update their 'Contact Information'.
- The student will learn how to update their 'Demographic information'.
- The students will learn how to add a 3<sup>rd</sup> Party Representative.

### 1.1 Expanding the 'Welcome' box



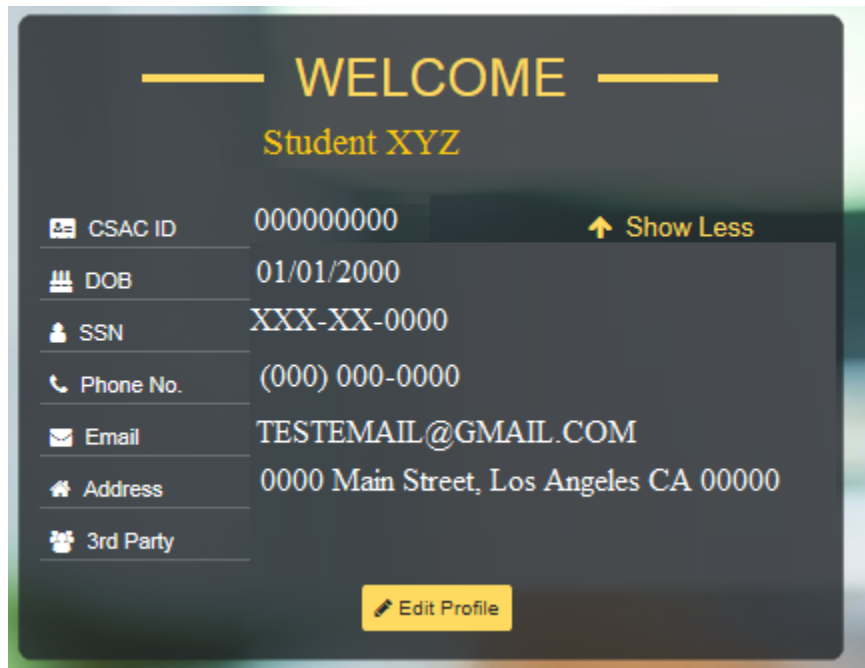
(Figure 1 – WebGrants for Students)

Step	Description	Action
1.	The student will need to log into their WebGrants 4 Students account.	Log into WebGrants 4 Students
2.	Once logged in the student will see a 'Welcome' box (Figure 1) with their name, CSAC ID and a 'Show More' drop down option displayed. The student will need to click the 'Show More' drop down option to expand the box.	Click 'Show More'

#### 1.1.1 Key Points

- Log into WebGrants 4 Students.
- Click the 'Show More' drop down icon to expand the 'Welcome' box.

## 1.2 'Edit Profile' Menu Access



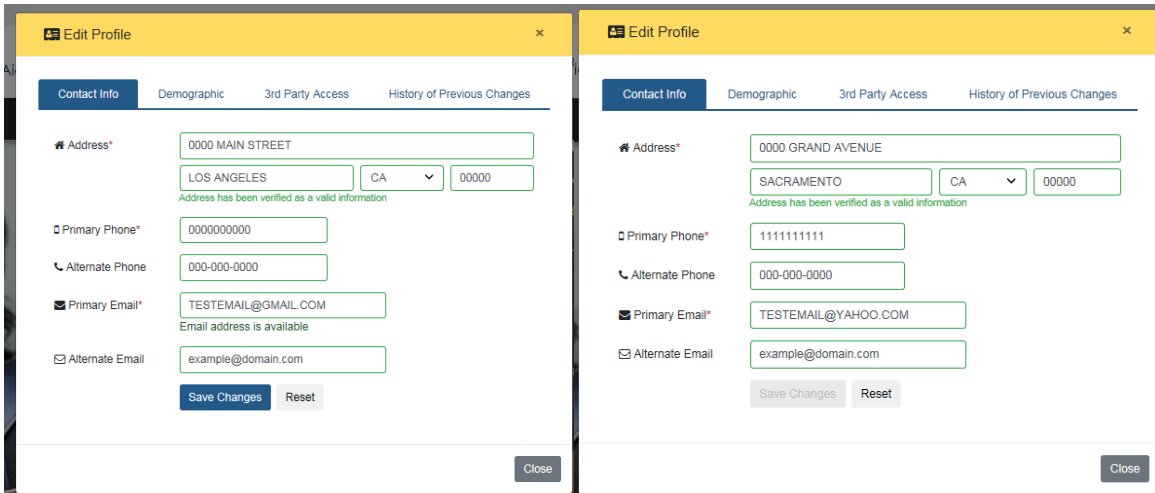
(Figure 2 – WebGrants for Students)

Step	Description	Action
1.	Once the student expands the 'Welcome' box (Figure 2) they will be able to view their currently saved profile information. If the student notices something is no longer valid or needs to make an update, they need to click the 'Edit Profile' button to access the 'Edit Profile' menu.	Click 'Edit Profile'

### 1.2.1 Key Points

- Click the 'Edit Profile' button if you need to update or correct profile information.

### 1.3 Updating Contact Information



(Figure 3 – WebGrants 4 Students)

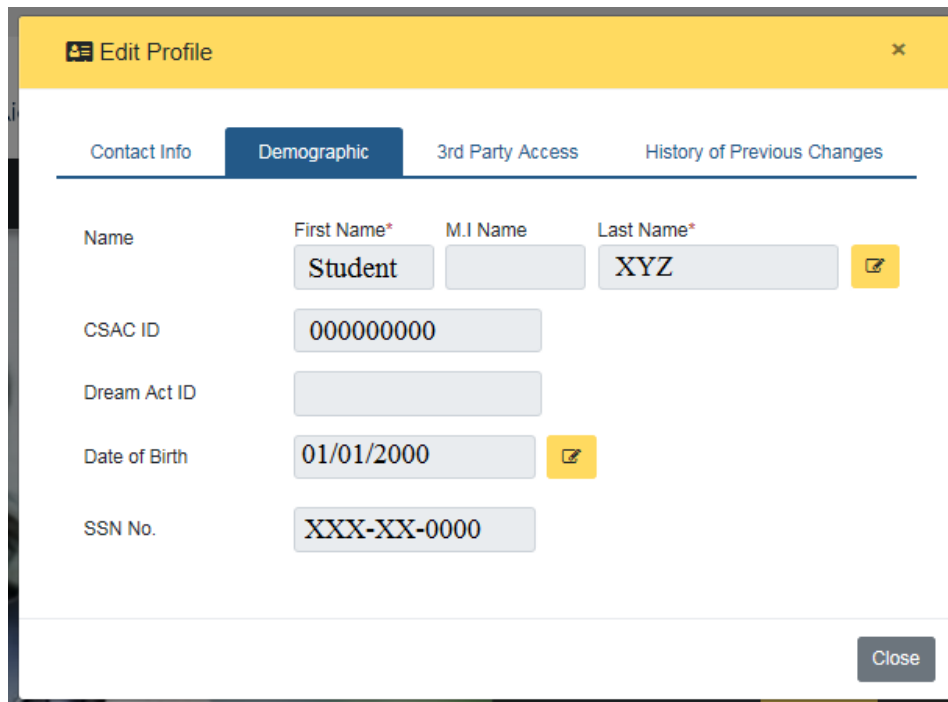
(Figure 4 – WebGrants 4 Students)

Step	Description	Action
1.	After the student clicks the 'Edit Profile' button the 'Edit Profile' menu (Figure 3) will pop up with the 'Contact info' tab selected as default. If the student needs to update their contact information all they need to do is type the updated information into the box and the outdated information will be overwritten (Example in Figure 4).	Type updated information into appropriate box.
2.	The student must then click 'Save Changes' or the information that they typed in will not be saved.	Click 'Save Changes'
3.	<b>Note:</b> Contact information includes the physical address, the primary phone number, the alternative phone number, the primary email address, and the alternative email address.	'NA'

#### 1.3.1 Key Points

- For updating contact information, you just type the updated information directly into the appropriate space.
- Then click 'Save Changes' or the information will not be saved.

## 1.4 Updating Demographic Information

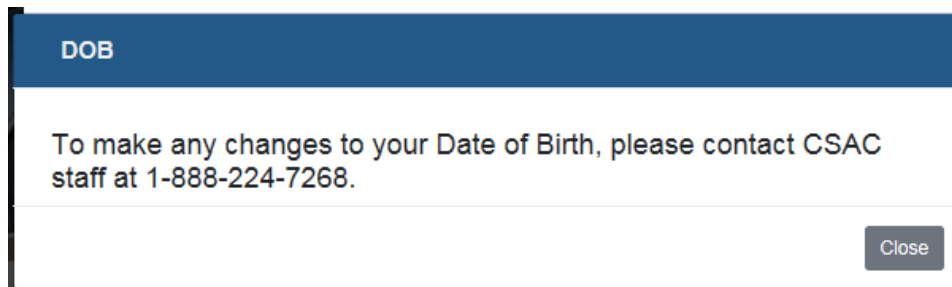


The screenshot shows a web application window titled "Edit Profile" with a yellow header and a close button. Below the header are four tabs: "Contact Info", "Demographic" (which is selected and highlighted in blue), "3rd Party Access", and "History of Previous Changes". The "Demographic" tab contains several input fields:

Name	First Name*	M.I Name	Last Name*
	Student		XYZ
CSAC ID	000000000		
Dream Act ID			
Date of Birth	01/01/2000		
SSN No.	XXX-XX-0000		

Each input field has a small yellow edit icon to its right. A "Close" button is located in the bottom right corner of the window.

(Figure 5 – WebGrants 4 Students)



The screenshot shows a blue header with the text "DOB". Below the header is a white box containing the following text:

To make any changes to your Date of Birth, please contact CSAC staff at 1-888-224-7268.

A "Close" button is located in the bottom right corner of the white box.

(Figure 6 – WebGrants 4 Students)

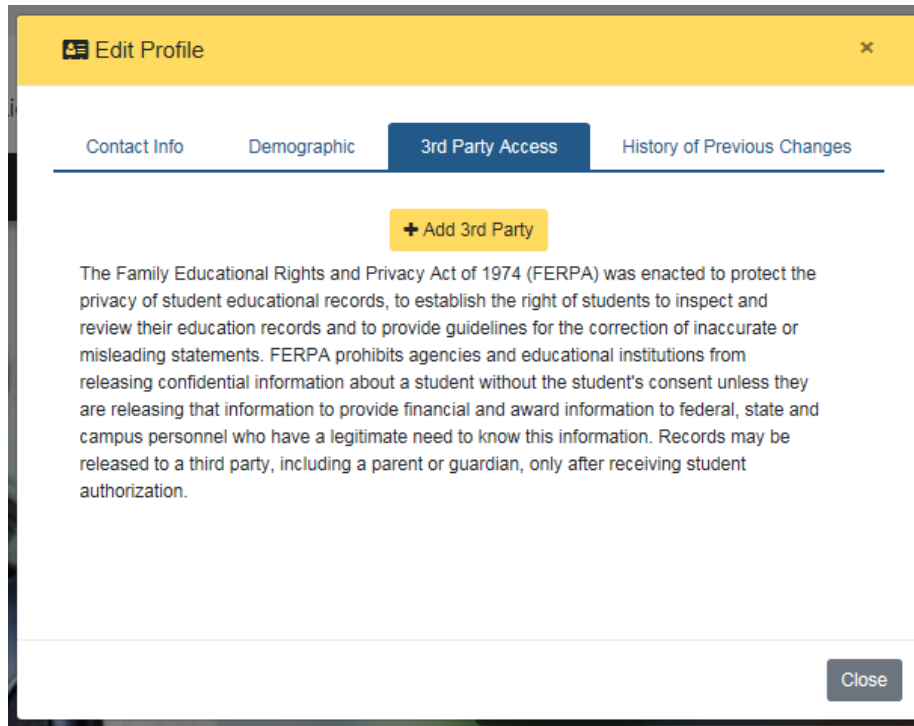
## WebGrants 4 Students: Updating Profile Information

Step	Description	Action
1.	After the student clicks the 'Edit Profile' button the 'Edit Profile' menu will pop up with the 'Contact info' tab selected as default. In order for the student to access the 'Demographics' tab all they have to do is click on it.	Click on 'Demographics' tab
2.	After the student clicks on 'Demographics' all their demographic information will display (Figure 5). If the student needs to update their name or date of birth, then they should click the yellow icon next to the field in need of updating and call the number listed in the info box (Figure 6).	Click yellow box and call listed number
3.	During the call you will speak to a representative of CSAC who will ask for certain documentation in order to change your demographic information for you.	Follow the instructions of the representative.
4.	<b>Note:</b> A future enhancement to this system may include the ability to directly upload necessary documentation into the 'Edit Profile' > 'Demographics' tab.	'NA'
5.	<b>Note:</b> Demographic information includes the student's name, CSAC ID, Dream Act ID (if applicable), and last four digits of their social security card number (if applicable)	'NA'

### 1.4.1 Key Points

- Click on the 'demographics' tab within the 'Edit Profile' menu.
- Click on one of the yellow icons.
- Call CSAC.
- Follow the instructions of the representative.

## 1.5 Accessing '3<sup>rd</sup> Party Access' menu



(Figure 7 – WebGrants 4 Students)

Step	Description	Action
1.	After the student clicks the 'Edit Profile' button the 'Edit Profile' menu will pop up with the 'Contact info' tab selected as default. In order for the student to access the '3 <sup>rd</sup> Party Access' tab all they have to do is click on it.	Click on '3 <sup>rd</sup> Party Access' tab
2.	After the student clicks the '3 <sup>rd</sup> Party Access' tab they will have a screen (Figure 7) displaying a button to add a 3 <sup>rd</sup> party and a paragraph explaining FERPA. The student should first read the FERPA statement.	Read FERPA statement
3.	After reading the FERPA statement, if the student wants to add a third party to their account, they must start by clicking the '+ Add 3 <sup>rd</sup> Party' button.	Click the '+ Add 3 <sup>rd</sup> Party' button

### 1.5.1 Key Points

- Click on the '3<sup>rd</sup> Party Access' tab
- Read FERPA statement and determine if adding a 3<sup>rd</sup> party is what you want to do.
- If you want to add a 3<sup>rd</sup> party, click the '+ Add 3<sup>rd</sup> Party' button.



## 1.6 Adding a 3<sup>rd</sup> Party Representative

PERSON 1

Name\*

Address\*

Relation\*

By checking the box, I authorize the California Student Aid Commission to release my confidential financial and award information to the person listed above. I understand that this consent is valid for up to five(5) years and that I have the ability to cancel consent at any time.

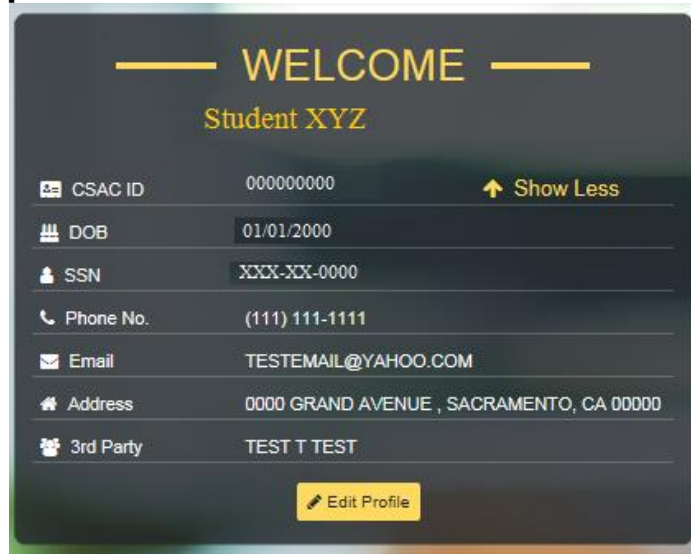
(Figure 8 – WebGrants 4 Students)

Step	Description	Action
1.	After clicking the '+ Add 3 <sup>rd</sup> Party' button, a drop down will appear where the student must enter the name of, address of, and relation to the 3 <sup>rd</sup> party person they would like to add.	Fill in fields with 3 <sup>rd</sup> party identifiers
2.	The student should then read the disclaimer, check the box next to it, and click 'Save Changes'.	Read disclaimer, click check box next to disclaimer, and click 'save changes'
3.	<b>Note:</b> A 3 <sup>rd</sup> Party user can be removed anytime by going back to the '3 <sup>rd</sup> Party Access' tab and clicking the 'Remove this person' button.	To remove a person, click the 'Remove this person' button.

### 1.6.1 Key Points

- Fill in the fields with the 3<sup>rd</sup> party identifiers.
- Read and check the disclaimer, and save your changes
- To remove a person, click the 'Remove this person' button.

## 1.7 Verifying Updates went Successful



(Figure 9 – WebGrants 4 Students)

Step	Description	Action
1.	The student should verify that the information was saved and the easiest way to do this is to go back to the 'Welcome' box (Figure 9) on the student's landing page and verify that all the information has updated correctly.	Verify information updated correctly in 'Welcome' box

### 1.7.1 Key Points

- Verify information updated correctly in the 'Welcome box' located on the Student Landing page.