Middle Class Scholarship (MCS 2.0)

Handbook

Contents

Introduction & Overview

The Middle Class Scholarship (MCS) handbook covers the required policies, processes, and procedures to administer the MCS program. The intended audience for this document is primarily college financial aid administrators. MCS is currently only offered at the University of California (UC), California State Universities (CSU), and select California Community Colleges (CCC) that offer a baccalaureate program.

The 2021-22 State Budget introduced significant changes to the MCS program starting in the 2022-23 academic year. The 2022-23 State Budget approved the $515 million appropriation in the General Fund bringing the total appropriation to $632 million. The annual appropriation amount for the MCS program is determined in the Annual Budget Act.

The new MCS program starting in the 2022-23 year will be referred to as MCS 2.0.

Education Code

California Education Code Section 70022 outlines the statutory requirements for the administration of the Middle Class Scholarship program available to undergraduate students enrolled in the California State University or the University of California, as well as Community College students enrolled in upper division coursework of a Community College baccalaureate program.

Applicant Eligibility & Requirements

Financial Aid Application Requirements

Applicants must meet ALL of the following requirements:

1. Complete and submit a FAFSA or CADAA no later than March 2 or the on-time deadline specified by CSAC for that processing year
2. Be attending a UC, CSU, or a participating CCC with a Baccalaureate program
3. Not be in default on a federal student loan
4. Be pursuing their first undergraduate baccalaureate degree or has completed a baccalaureate degree and has been admitted to, and is enrolled in, a program of professional teacher preparation at an institution approved by the California Commission on Teacher Credentialing

5. Not be incarcerated
6. Be a California resident **and** a U.S. citizen or eligible noncitizen, **or** meet the eligibility the eligibility criteria of California Education Code Section 68130.5 commonly known as AB 540 status
7. Maintain satisfactory academic progress
8. Be attending at least half-time

Income and Asset Requirements

Applicants must meet the annual [MCS 2.0 household income and asset ceilings](#) specified for the applicable academic year. Per California Education Code section 70022, MCS 2.0 income and asset ceilings are adjusted annually using the change in the cost of living which is the percentage change in California per capita personal income from the preceding year.

Renewal of scholarship award

Per California Education Code section 70022.5 (a), MCS 2.0 awards may be renewed for a total of the equivalent of four years of full-time attendance in an undergraduate program. The total number of years of eligibility for MCS 2.0 awards are based on the student's educational level (EL) in his or her course of study as designated by the school of attendance. CSAC uses the EL reported by the school on the enrollment file or through a correction on the Payment Roster File during the initial MCS year, and NOT the EL found on the ISIR. A student's eligibility percentage is considered "established" at the time the student receives their initial MCS payment.

Students may track their MCS 2.0 lifetime eligibility through their WebGrants for Students account. This information is also available in WebGrants on the MCS Student Award Summary and Display Roster screens.

- EL 0 or 1   = 400%
- EL 2   = 300%
- EL 3   = 200%
- EL 4   = 100%
- EL 5   = additional 100 % for students in an approved TCP or 5-year undergraduate program.

Teacher Credential Program (TCP)

In accordance with California Education Code section 70022(a)(3)(I), a student pursuing his or her first undergraduate baccalaureate degree or who has

completed a baccalaureate degree and has been admitted to, and is enrolled in, a program of professional teacher preparation at an institution approved by the California Commission on Teacher Credentialing is eligible for a MCS 2.0 award if all other eligibility requirements are met.

California Education Code section 70022.5(c), states that a recipient of a MCS 2.0 award who has completed a baccalaureate degree, and who has been admitted to and is enrolled in a program of professional teacher preparation at an institution approved by CSAC on Teacher Credentialing, is eligible for, but not entitled to, renewal of the scholarship award for an additional academic year of full-time attendance as long as the student meets the requirements of Section 70022.

Students pursuing an eligible teacher credential program who meet the criteria as specified above and all other eligibility requirements for the MCS 2.0 program, are eligible for an additional 100 percent of MCS lifetime eligibility including:

- Students pursuing a subsequent teacher credential if they have not previously received an MCS award for a TCP while obtaining a prior teacher credential.
- Students who are dually enrolled in a master's degree program or who have obtained a master's degree. MCS funds for TCPs are subject to the teacher credential units the student is enrolled in.
  - When determining the cost of attendance and enrollment status for a student who is dually enrolled in a master's degree program, schools may not include any coursework other than the coursework required for the teacher credential.
  - For students whose tuition is charged based on the master's degree program, an adjustment to the cost of attendance (COA) reported to CSAC will be required – based on the equivalent COA for the credential program.

Institutionally Prescribed Five-Year Undergraduate Programs

California Education Code section 70022.5(b), states that a recipient of a MCS 2.0 award who is enrolled in an institutionally prescribed 5-year undergraduate program, can have its MCS 2.0 award renewed for a total of up to five academic years of attendance as long as the students meets the requirements of Section 70022.

- Only campuses with eligible 5-year programs are allowed to submit records for consideration.
- A student with and EL => 5 does not qualify for MCS 2.0
- Enrollment records submitted with an EL of 5 are only for students enrolled in an approved TCP or 5-year undergraduate program.

Award determination and use of enrollment files

Under the MCS 2.0, awards will be determined based on the difference between the student's cost of attendance and the sum of the following amounts:

1. Other federal, state, institutional administered scholarships, grants and fee waivers awarded to the student;

   a) as well as any private scholarships awarded to the student that are in excess of the sum of items 2 and 3 below. See additional details in the Private scholarships section below.

2. $7,898 reflecting an expected student contribution toward cost of attendance from work earnings or other resources.

3. 33% of the parents' contribution from adjusted available income (abbreviated as AAI on federal/Cal ISIR file), as determined using the federal Title IV methodology for dependent students with an annual household income greater than $100,000 dollars.

Private Scholarships

Formula for MCS 2.0 award for dependent students with household income greater than $100,000 dollars = (federal aid + state aid + institutional aid/waivers) + [private scholarships – ($7,898 + 33% of parent's contribution from AAI)]

EXAMPLE:

- Institutional grants and fee waivers: $2,000
- Student contribution: $7,898 (fixed)
- Private scholarships: $9,000
- Parent contribution from AAI (ISIR or Cal ISIR field 324): $3,000

1.   33% of Parent Contribution from AAI: 33% X $3,000 = $990

2. Private scholarships (excess): $9,000 – ($7,898 + $990) = $112 (excess)

3. Report on enrollment file field 17: $2,000 (institutional grants) + $112 (excess) = **$2,112**

Formula for MCS 2.0 award for all other household types = (federal aid + state aid + institutional aid/waivers) + (private scholarships - $7,898)

Note: *Students who have no private scholarships or whose scholarship amount is less than the expected student contribution of $7,898, will have that part of the formula equal zero.*

EXAMPLE:

- Institutional grants and fee waivers: $2,000
- Student contribution: $7,898 (fixed)
- Private scholarships: $9,000

1. Private scholarships: $9,000 – $7,898 = $1,102 (excess)

2. Report on enrollment file field 17: $2,000 (institutional grants) + $1,102 (excess) = **$3,102**

2023-24 Planned Update: *CSAC will separate out the private scholarships from the Institutional grants and fee waivers field and add as a new field in the enrollment file. Campuses can then report out the total private scholarship amount and CSAC will perform the calculation.*

MCS 2.0 award consideration is performed through the campus submission of enrollment files. Submitting student enrollment records to the CSAC is effectively providing MCS 2.0 applications for UC and CSU students. Please refer to the enrollment file layout and upload process sections on pages 25 and 26. CSAC uses this information contained in the enrollment files to determine a student's MCS 2.0 award eligibility and calculate an award amount for an Eligible Applicant. Once CSAC has determined an Eligible Applicant's award amount, an award notification is sent to the student. A Roster file is then created and available for campuses in WebGrants.

The initial enrollment files are uploaded typically during the first two weeks of July. Once the payment and correction process are opened in late July or August, enrollment files can be uploaded on a weekly basis. Subsequent enrollment files may be submitted to process any records **not previously submitted or previously determined ineligible students** that need to be re-evaluated due to new information (COA, financial aid awards).

Campuses should not include enrollment records for the following:

- Eligible Applicants that have already been awarded the MCS 2.0.

- Corrections to Eligible Applicants that are already awarded. To make corrections to awarded Eligible Applicants, campuses should utilize the payment and correction file (see payment and correction file section on pages 33 - 41).

Submitting duplicate or awarded Eligible Applicant enrollment records may prevent the processing of new enrollment records.

Financial aid programs reported on the enrollment file

The following list contains the most common awards to cover the federal, state, and institutionally administered student scholarships, grants, and fee waivers. If there are awards not listed but that meet the criteria to be considered, please identify the source or provider of the award, and determine which award category it belongs to. There are some sources of aid that should not be considered as indicated below.

Note: *Cal Grants are considered when determining MCS 2.0 eligibility but **are not reported** by the school on the enrollment file, CSAC will add Cal Grant awards into the MCS 2.0 awarding formula.*

Sources that are not to be considered:

- Federal Veterans Education Benefits Excluded from EFA per USDE (Updated)
- CA Volunteers Living Allowance
- Internship or Assistantship (if treated as employment)
- Dream Act Service Incentive Grant (DSIG)

Enrollment file field 16 - Federal Awards:

- Pell Grant
- FSEOG
- Teach Grant
- BIA Grants
- Iraq Service Grant

Enrollment file field 17 - Institutional Grants, fee waivers and Private Scholarships:

- Institutional grants
- Athletic scholarships
- Fee waivers such as, but not limited to Alan Pattee, Foster Youth, COVID-19, Cal Vet Fee Waiver, California Department of Rehabilitation, employee tuition assistance, etc.
- EOP
- Institutionally administered scholarships (including internship payments counted as EFA), and basic needs direct awards if counted as EFA.
- Private Scholarships – report the amount that is in excess of the sum of the $7,898 student contribution and if applicable, 33% of parents' contribution from adjusted available income for dependent students with annual household income over $100,000 (See section on private scholarships on pages 7 and 8)

Enrollment field 18 - State Awards:

- Chafee Grant
- Child Development Grant
- LEPD
- National Guard
- CA Volunteers - College Corps (Education Award if not used for repayment of student loans)
- Golden State Teachers Grant Program

Awarding Formula

The following table illustrates the MCS 2.0 awarding formula and data sources used to evaluate an award.

Awarding Elements	Provided by	Source
Cost of Attendance	Campus	Enrollment file
(less) Aid Awarded		
Federal	Campus	Enrollment file
Institutional	Campus	Enrollment file
State	Campus	Enrollment file
Cal Grant	CSAC	WebGrants
(less) Student Contribution - $7,898	CSAC	WebGrants
(less) 33% Parent Contribution*	CSAC	WebGrants
(multiply by) Phase in factor - 26%	CSAC	WebGrants
Raw MCS Award amount	CSAC	WebGrants
a) Divide by 6	CSAC	WebGrants
b) Round to nearest whole dollar**	CSAC	WebGrants
c) Multiply by 6	CSAC	WebGrants
Final MCS Award Amount	CSAC	WebGrants

Only applicable for dependent students with annual household income greater than $100,000. The Parent Contribution is derived from the Adjusted Available Income.

*** .49 or below rounds down and .50 and above rounds up.*

Note: *For less than full time enrollment amounts, please refer to the MCS Display Roster as it will calculate the corresponding award amount.*

Award amounts

For any student who qualifies for an MCS 2.0 award of at least one dollar ($1), the minimum annual amount for full-time enrollment is ninety dollars ($90). When the annual award is split in the different terms, the extra dollar(s) that may result from this calculation, will be applied to the first term(s).

Currently, a maximum award cap does not exist.

Part-time or partial year students

For students attending less than full time or students enrolled or a partial year (one semester or less than three quarters), campuses should still provide full year student enrollment information. Initial MCS 2.0 awards for students will be evaluated at a full-time student basis and campuses should report accordingly. Once the applicant has been offered an MCS 2.0 award, campuses can make term or annual adjustments to reflect the student's status.

Reporting less than full time or partial year information for a student on the enrollment file will calculate an incorrect annual award amount.

Repeated coursework policy

Consistent with federal rules, in order for a repeated course to count toward the student's MCS 2.0 enrollment status, students may only repeat a previously passed course once (a total of two attempts). This rule applies whether or not the student received MCS 2.0 aid for earlier enrollments in the course.

- Students may receive MCS 2.0 aid when repeating a course for the first time.

- Students may receive MCS 2.0 aid when repeating a course that was previously failed or withdrawn from regardless of the number of times the course was attempted and failed. (Satisfactory Academic Progress Policy still applies).

- Students may receive MCS 2.0 aid to repeat a previously passed course one additional time. If the student fails the second attempt, no more MCS 2.0 aid will be given to repeat the course a third time. If the second attempt is a withdrawal, then it is allowable for a third attempt.

Education abroad or travel study programs

Students in education abroad or travel study programs administered by the campus, or a third-party organization are eligible for MCS 2.0 if they meet these conditions:

1. The home campus should be a UC, CSU or CCC and should administer all the student's financial aid

a. Campuses should disburse the MCS 2.0 award based on existing federal student aid guidelines for education / travel study programs.

2. Courses taken will count towards the completion of the student's college degree.

Treatment of MCS 2.0 award

The MCS 2.0 award is not based on a student's Expected Family Contribution (EFC)or Student Aid Index (SAI), and thus considered a non-need-based award. The maximum MCS 2.0 award plus any other estimated gift aid shall not exceed the COA, but may exceed financial need for state aid programs (e.g. Cal Grant). Therefore, an MCS 2.0 award may supplant the EFC/SAI for state aid programs, while recognizing and maintaining consistency with the campus's rules for institutional aid. Campuses may need to adjust federal or institutional aid to comply with federal financial aid rules.

Updating information for awarded students

Campuses can make corrections to awarded Eligible Applicants to reflect changes to a student's COA, financial aid information and eligibility through the payment and correction file (see payment and correction file layout and section). The correction and payment file has a transaction type on field 42 that campuses can select to indicate if the record is a correction or a payment.

To reiterate this from the awarding section earlier, campuses should not update information through an enrollment file for awarded students. Instead, use the correction and payment file process or post manually on the MCS 2.0 Display Roster screen.

Once a campus submits a correction for a student, CSAC will re-evaluate the award with the updated information and provide a new award amount if the student continues to meet eligibility.

Dependent students with annual household income greater than $100k

As described earlier, dependent students with annual household income greater than $100k are subject to a reduction of their MCS 2.0 award by 33% of the parents' contribution from adjusted available income.

- Annual household income or total income is field 310 on the federal or Cal ISIR which represents both the student and parent incomes.

- The parent contribution from adjusted available income is field 324 on the federal or Cal ISIR. CSAC will calculate 33% of the parents' contribution using the amount from field 324 when applicable.

For the MCS 2.0 program, income corrections should be submitted only in these situations:

1. Not meeting income ceiling - if the awardee no longer meets the authorized income ceiling, then a correction should be made to the student's record.

2. Total income over $100k – if the dependent awardee now exceeds the total income of $100,000 dollars, or if the income remains over $100,000 dollars but the amount has changed, then a correction should be made to the student's record.

3. Total income under $100k – if the dependent awardee is now under the total income of $100,000 dollars, then a correction should be made to the student's record.

Upcoming 2022-23 Update: *CSAC will be updating its system shortly to recalculate a student's MCS 2.0 award based on corrections submitted by campuses based on new ISIR information. It is not currently looking at the updated value for the parent contribution and other values in the ISIR reported with the correction. A communication will be released via CSAC Listserv once this has been completed.*

Payments, withdrawals, and refunds

Campuses can report payments for MCS 2.0 using the online roster or through the batch upload process with the payment and correction file.

Please refer to the payment and correction section including scenarios for further information.

Students are eligible to receive MCS 2.0 disbursements based on their enrollment status for that term:

- Full time (12 units or higher) – full time term payment
- ¾ time (9 to 11 units) – ¾ time term payment
- ½ time (6 to 8 units) – ½ time term payment
- Less than half time (5 units or less) – not eligible for term payment

If any of the less than full time enrollment causes a change in the cost of attendance or financial aid awards, then campuses should submit an appropriate correction for the term or at the annual level to reevaluate the MCS 2.0 award. Once the MCS 2.0 award has been reevaluated, the campus can post the applicable payment and adjustment code.

MCS 2.0 census date

CSAC will allow campuses to utilize their financial aid census date for the MCS 2.0 program. MCS 2.0 payments should be disbursed based on the recipient's enrollment status using the institution's financial aid census date, or its equivalent. Any payment adjustments past the census date should follow the institution's financial aid census date policies.

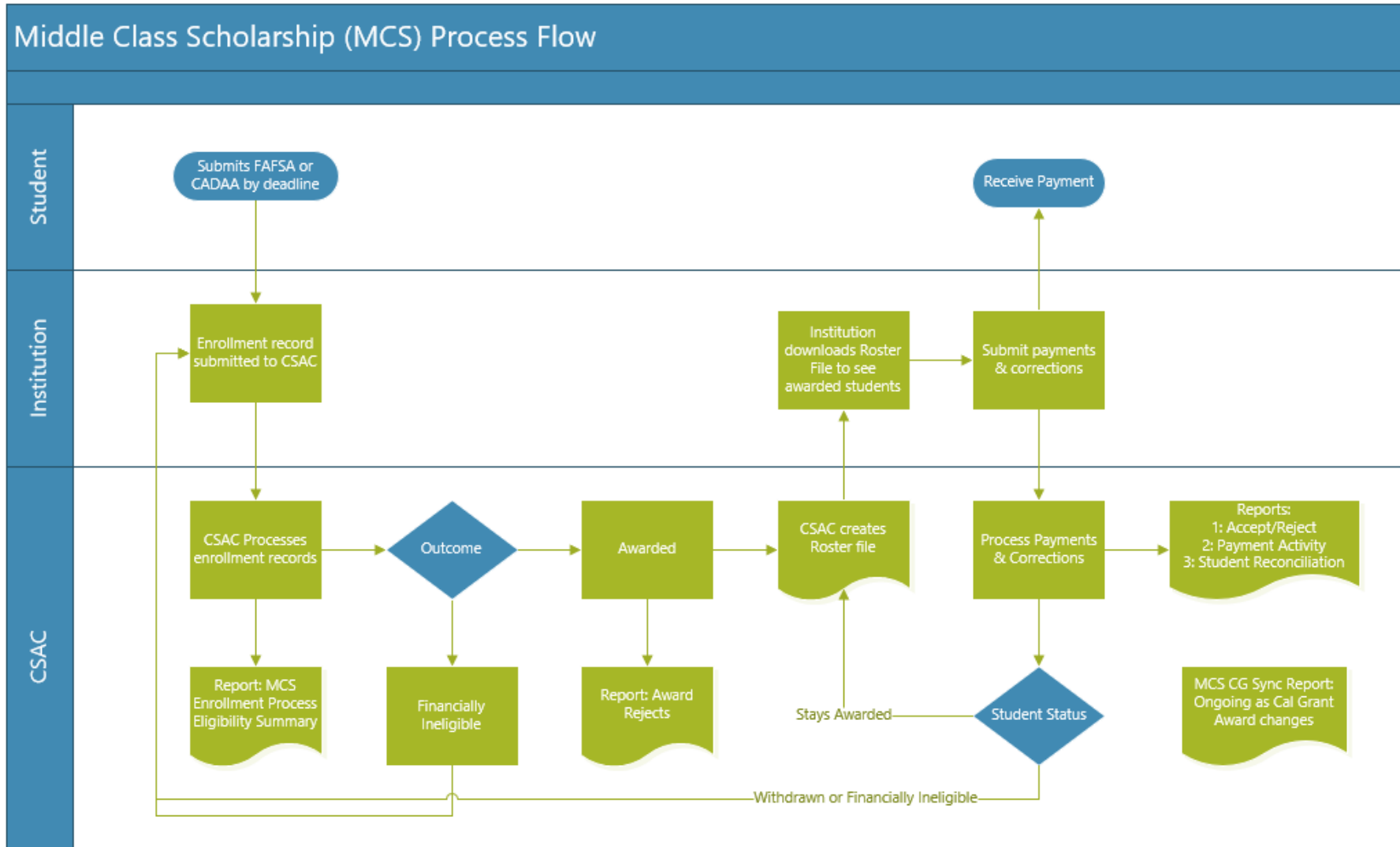## MCS 2.0 Drop, Withdraw and Refund Policy (R2T4)

The Commission requires that schools have a written Middle Class Scholarship refund policy under the MCS 2.0 program to be implemented in the 2022-23 academic year. This policy should consider and comply with any federal Return of Title IV requirements. Under §484B of the HEA (20 U.S.C. §1091b), if a recipient of a Title IV grant or loan assistance withdraws from an institution during a payment period or period of enrollment in which the student began attendance, a participating institution must determine the amount of grant and/or loan assistance to be returned to the Title IV programs. Similarly, institutions are required to determine the earned and unearned portions of the MCS 2.0 award based on the amount of time the student attended.

Other considerations:

- Once the MCS 2.0 portion has been determined through the withdrawal calculation and the amount has been appropriately applied or adjusted for that term, no further corrections are required for that withdrawn term.

- For students who withdraw prior to disbursement, campuses should determine the MCS 2.0 award amount for that term per their MCS 2.0 refund policy.

Once the withdrawal calculation is complete and the MCS 2.0 amount has been determined for that term, campuses shall report the payment or correction on the MCS 2.0 roster utilizing the adjustment reason "5" for Refund/Adjusted Payment with the appropriate MCS 2.0 payment. However, the less than maximum term payment due to the withdrawal calculation will still use the student's full term's eligibility.

Given this system limitation, campuses may cancel the MCS 2.0 award for a student in this scenario and use the "not enrolled" option in WebGrants for that term.
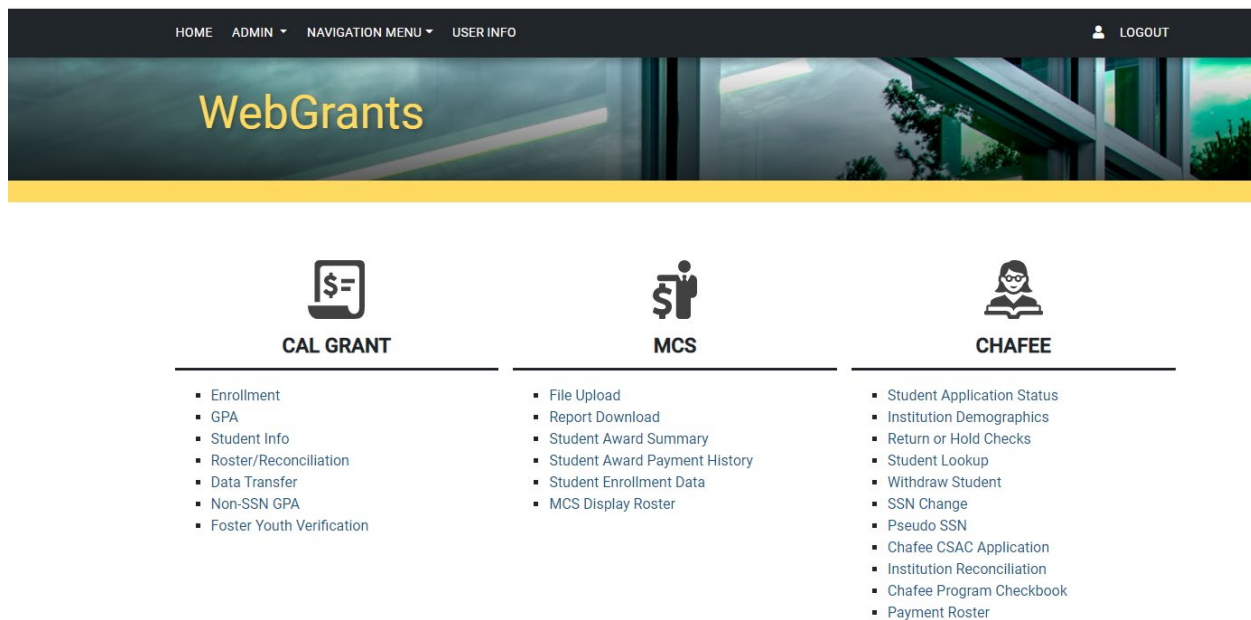
MCS Process Flow

Middle Class Scholarship (MCS) Process Flow

Student
- Submits FAFSA or CADAA by deadline
- Receive Payment

Institution
- Enrollment record submitted to CSAC
- Institution downloads Roster File to see awarded students
- Submit payments & corrections

CSAC
- CSAC Processes enrollment records
- Outcome
- Awarded
- CSAC creates Roster file
- Process Payments & Corrections
- Reports: 1: Accept/Reject 2: Payment Activity 3: Student Reconciliation
- Report: MCS Enrollment Process Eligibility Summary
- Financially Ineligible
- Report: Award Rejects
- Stays Awarded
- Student Status
- MCS CG Sync Report: Ongoing as Cal Grant Award changes
- Withdrawn or Financially Ineligible

WebGrants Screens

MCS has its own section within WebGrants. There are screens for tasks such as viewing information, making updates, making payments, viewing reports, uploading, and downloading files.

1. Navigate to the WebGrants System login page and login with your credentials

   [CSAC - WebGrants Home (ca.gov)](#)

If the MCS menu is not visible, then the current profile is not authorized to access MCS. If needed, reach out to your school's WebGrants administrator for access.

The 6 sub-menus are as follows:

1. File Upload
2. Report Download
3. Student Award Summary
4. Student Award Payment History
5. Student Enrollment Data
6. MCS Display Roster

1: File Upload

The File Upload screen is where campuses can submit information to CSAC such as Enrollment Files and Payment Roster Files further detailed in the MCS Data Uploads & File Layouts section in this document.

2: Report Download

The Report Download screen is where campuses can download CSAC provided reports. Additional detailed information is included within this document at the following location (pages 30-32):

1. Report Download: [MCS Output Reports / Files Provided by CSAC](#)

3: Student Award Summary

- This screen provides an overview of the student's information and award details:
    - Demographic
    - Year Entered Program
    - Eligibility % (Total, Used and Remaining)
    - TCP/5th Year Flag
    - Educational Level (Established and Current)
    - Award Status (Awarded, Financially Ineligible, Withdrawn)
    - Award Amounts (by term and total)
    - Income & Asset Amounts
    - Cost of Attendance
    - Other Aid (Cal Grant, State Aid, Federal, Institutional Aid)
    - Dependency Status
    - Marital Status
    - Family Size
    - Award Status Date
    - Award Details Section

Home > MCS > Student Award Summary

Close Page Instructions

- Enter the SSN / Dream Act ID or CSAC ID and select the academic year for search.
- If "All" is selected for the Acad Year, the most current information on file will display for the following fields: Total Eligibility, Used Eligibility, Remaining Eligibility.

Download PDF

Student Info

Name:		5th Yr Program:	No
Address:		Year-Entered:	2022
		Total-Eligibility:	100.00%
Home Phone:		Used-Eligibility:	0.00%
Cell Phone:		Remaining-Eligibility:	100.00%
Email:		Established Educational Level:	4th year/senior
Dream Act ID / SSN:			
CSAC ID:		Current Educational Level:	4th year/senior
DOB:		Dependency Status:	INDEPENDENT
TCP Flag:	No	Marital Status:	SINGLE
		Family Size:	2
		Award Status Date:	09/23/2022

Award Details

Acad Year	Institution Name	Award Status	Reported Total Income	Reported Asset Amount	Reported Cost of Attendance	Reported Cal Grant Amount	Reported State Award	Reported Federal Grant	Reported Institutional Aid	Fall Award Amount	Winter Award Amount
2022	CSU SACRAMENTO (00115000)	AWARDED	$40,894	$0	$34,312	$0	$0	$0	$5,742	$2,688	

4: Student Award Payment History

- The MCS Student Award Payment History screen will provide information on any payments and/or corrections that have been processed for that student at both the annual and term level.
- Includes eligibility used with payments.

5: Student Enrollment Data

- This screen allows the user to view the student's enrollment information submitted by the campus.
- You must enter the School ID, Academic Year and SSN for the search criteria.
- There are 3 Enrollment Statuses:
  1. **Blank**: Student rejected from the Enrollment file, is not awarded or is not on the roster
  2. **Pending**: Not processed through the award cycle.
     - The record does not match CSAC's data or
     - Another campus uploaded an enrollment record for the student
  3. **Found in Roster**: Student is on campus' roster

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HOME   ADMIN ▾   NAVIGATION MENU ▾   USER INFO   👤 LOGOUT

| School ID | | Acad Year | 2022 - 2023 ▾ | Dream Act ID / SSN | | Retrieve | Add |

⚠ • You only have read access to this screen.

Home > MCS > Student Enrollment Data   📖 Close Page Instructions

- Enter the School ID, select the Academic year, enter Dream Act ID / SSN and click on the Retrieve Button to review and update information.
- Enter the School ID, select the Academic year, enter Dream Act ID / SSN and click on the Add Button to update information in a blank form.
- Only records with a blank or Pended Enrollment status can be modified.
- Students that have been awarded cannot be modified. Awarded students will have an Enrollment status of Found in Roster.
- Click Submit to update the record.

Student Enrollment Data   ⌄

Student Enrollment Data   ⌄

CSU SACRAMENTO

SSN ▮▮▮▮▮▮▮▮▮▮▮▮▮   Academic Year   2022

First Name ▮▮▮▮▮▮▮▮▮▮ MI ▮▮▮   Last Name ▮▮▮▮▮▮▮▮▮▮

Email Address ▮▮▮▮▮▮▮▮▮▮   Date of Birth ▮▮▮▮▮▮▮▮▮▮

Education Level | 4th year/senior ⌄ | Dependent Status | 2 - Independent ⌄ |

Student Status | 2 - Continuing ⌄ | Term Type | 1 - Semester ⌄ |

ISIR Txn Nbr | 02 | Total Income | 40,894 |

Federal Award Amount | 0 | Institution Aid Amount | 5,742 |

State Award Amount | 0 | TCP or 5th Year Program | ⌄ |

Cost of Attendance | 34,312 |

Upload Date **08/19/2022**   Enrollment Status **Found in Roster**

Submit   Reset

6: MCS – Roster

Detailed information on how to use the MCS Roster is located within this document at:
[How to use the Online Payment Roster](#)

UC LOS ANGELES

Student List	⌄

Payment Roster	⌄

Student Demographics

Name		Cal Grant Award	$0	Total Elig-%	400
CSAC ID		Max Award Amount	$3042	Used Elig-%	33.33
SSN No		Annual Award	$3042	Remain Elig-%	366.67
DOB		Asset Amount	$200407	Year Entered	2022
Education Level	1st year, never attended college	TCP/5th Yr-Indicator		Student Contribution	$7898
				Parent Contribution	$53880

Transaction

📖 Close Page Instructions

- Select the transaction type to make corrections or payments.
- If Correction type is selected, please choose annual data to make changes at the annual level or term data to make changes at the term level.
- After making changes, save the data.

✕

Transaction Type   ○ Correction ○ Payment   [Payment History]

Annual Data

Eligibility Change	-- Select One --	Total Income	$187963	$
Academic Year	2022 - 2023	Cost of Attendance	$37385	$
Open Terms	Fall, Winter, Spring	Federal Aid	$0	$
		Institutional Aid	$0	$
		State Aid	$0	$
		ISIR Tran #	04	

Term Data

	FALL TERM	WINTER TERM	SPRING TERM
Enrollment Status	-- Select One --	-- Select One --	-- Select One --
	[FT - (Pay)]	[ ]	[ ]
Max Term Award Amount	$ 1014	$ 1014	$ 1014
	[$1014]	[$1014]	[$1014]
Term Award Amount	$ 1014	$ 1014	$ 1014
	[$1014]	[$1014]	[$1014]
Adj. Reason Code	-- Select One --	-- Select One --	-- Select One --
	[ ]	[ ]	[ ]
Amount Paid/Verified	$	$	$
	[$1014]	[$]	[$]
Cost of Attendance	$	$	$
	[$12462]	[$12462]	[$12461]
Federal Aid	$	$	$
	[$0]	[$0]	[$0]
Institutional Aid	$	$	$
	[$0]	[$0]	[$0]
State Aid	$	$	$
	[$0]	[$0]	[$0]
Payment Status	Reconciled	Not Reconciled	Not Reconciled

California Student Aid Commission
MCS Handbook
Version 1.0 MM/DD/YYYY

MCS Data Uploads & File Layouts

The MCS award process requires schools to submit student enrollment data to CSAC. The financial aid eligibility data included in the enrollment file allows CSAC to determine the MCS award amounts for eligible students.

Specific file layouts must be followed when transmitting information to CSAC. Current file layouts are located on the CSAC website at: https://www.csac.ca.gov/post/middle-class-scholarship-0

There are two file layouts provided for UC's and CSU's that must be uploaded each year:

1. MCS Enrollment File
2. MCS Payment Roster File

For participating CCC's with approved baccalaureate programs, please contact CSAC's School Support Unit to request the current file layout as these programs have different specifications. For more information, refer to the 'California Community College Baccalaureate Programs' section within this document for additional information

1: MCS Enrollment File

The campus provides specific information for new and continuing enrolled undergraduate students to CSAC. The campus includes the student's total cost of attendance (COA), financial information and the ISIR or Cal ISIR number used in providing the data. CSAC uses this information to calculate the maximum award values. Once CSAC has determined the student's award amounts, an award notification is sent to the student. A Roster file is created and available for campuses in WebGrants. The initial enrollment files are uploaded during the first two weeks of July. Once the payment & correction process is opened in late July or August, new enrollment records can be uploaded and processed on a weekly basis. All new records to be considered for MCS should be submitted to CSAC by Friday close of business.

Include students who meet the following criteria:

- Completed an on-time FAFSA or CADAA
- New and continuing students (including transfer students)
- Meet the income and asset ceiling – Current AY income and asset ceilings can be found at:

- o https://www.csac.ca.gov/middle-class-scholarship
- Are meeting Satisfactory Academic Progress (SAP)

Subsequent enrollment files may be submitted to process any records **not previously submitted or previously determined ineligible students** that need to be re-evaluated due to new information (COA, financial aid awards).

Campuses should not include enrollment records for the following:

- Eligible Applicants that have already been awarded an MCS 2.0 award

- Corrections to Eligible Applicants that are already awarded. To make corrections to awarded Eligible Applicants, campuses should utilize the payment and correction file (see payment and correction file section).

Submitting duplicate or awarded Eligible Applicant enrollment records may prevent the processing of new enrollment records.

2: MCS Payment Roster File

The MCS payment process does not advance funds like the Cal Grant program, MCS funds are disbursed once campuses start applying payments. Prior to posting payments, campuses should verify student attendance and eligibility. Upon reconciliation of the payment file, CSAC 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 and manual postings are accepted throughout the week and processed on Tuesday and Friday nights. Updates to the records will be available on Wednesdays and Mondays and the delivery of funds will follow approximately one week after payments are processed.

Payment files can begin as early as late July and are contingent on budget enactment for the corresponding award year.

How to upload MCS files

1. Select 'File Upload' from the MCS Menu in WebGrants*

MCS

- File Upload
- Report Download
- Student Award Summary
- Student Award Payment History
- Student Enrollment Data
- MCS Display Roster

*If the MCS menu is not visible, then the current profile is not authorized to access MCS. If needed, reach out to your school's WebGrants system administrator for access.

2. On the File Upload screen, enter your School ID, Academic Year, and select the desired option from the 'File Type' dropdown

Home > MCS > File Upload > MCS File Upload   📖 Close Page Instructions

- File type must be .txt or .csv
- Enter the file path and name of your file (Use the Browse button to find your file).
- Click the Begin Upload button to start this operation.
- If the file validation fails, no data will be uploaded. Please correct error and upload.
- Please ensure your file encoding is ANSI.

File Upload   ⌄

School ID *

Please enter School Code.

Academic Year *   – Select –

File Type *   – Select –

File *   Choose file...   Browse

Please enter the file path and file name.

Begin Upload

3. Click on 'Choose File' to select the file to upload
4. Click the 'Begin Upload' button

Failed Upload (General Error)

If the file fails the field level validation, the system will reject the file and display an exception message. The file must be corrected, and the entire file must be uploaded again.

In the **File Upload Status** panel, you will see the **Download Error Report** button. This is only created when invalid records are discovered in the file.

Clicking the button will display the **MCS Payment File Format Exception Report** which provides the details of the errors for each of the invalid records.

```
                              CALIFORNIA STUDENT AID COMMISSION
                          MCS Payment File Format Exception Report
                                 CAL POLY STATE UNIVERSITY
                                                                    | 2022-12-13 16:12:31 PST
------------------------------------------------------------------------------------------------
File Header/Footer error.Please correct errors and upload entire file again:
MCSP09    00114300SCAL POLY STATE UNIVERSITY       202212132022
Incorrect length of file header
------------------------------------------------------------------------------------------------
```

Successful Upload

If the file passes the file format validation, the system will display the MCS Successful Upload dialogue box.

Once successfully uploaded, the system will display the **MCS File Upload Status** embedded panel which provides a high- level overview of the file status.

California Student Aid Commission
MCS Handbook
Version 1.0 MM/DD/YYYY

MCS Output Reports / Files Provided by CSAC

- Reports are generated twice a week, except for the Enrollment File and MCS Cal Grant Sync which are only produced once a week, and contain information only for those students who had enrollment records, corrections, or payments applied during the week. Roster files, however, will generate twice a week even if no payments or corrections were applied.
- Available to UC & CSU campuses and CSAC staff
- Reports are found under Report Download in the MCS menu.

MCS

- Report Download
- Student Award Summary
- Student Award Payment History
- Student Enrollment Data
- MCS Display Roster

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HOME   ADMIN ▾   NAVIGATION MENU ▾   USER INFO   👤 LOGOUT

School ID: _____   Acad Year: [2022 - 2023 ▾]   Month: [December ▾]

File Type: [---SELECT--- ▾]   Media: [Data File ▾]   [Search]

---SELECT---
Enrollment File Report
Roster File Report
Accept/Reject Report
Payment Activity Report
Admission File Report
Award Rejects Report
Student Reconciliation Report
MCS CG Sync Report

Home > MCS   📖 Close Page Instructions

- To select _____ search.
- To download _____ load button.
- File Type - _____ ile Report (Manual), Student Reconciliation Report can be retrieved and downloaded in Data File and Report media type.
- File Type - Roster File Report, Accept/Reject Report can be retrieved and downloaded in Data File media type only.
- File Type - Awards Reject Report, Payment Activity Report, MCS CG Sync Report can be retrieved and downloaded in Report media type only.

Not all reports are available in both 'Data File' and 'Report' media formats. The table below shows which reports are available in which format. If you select a combination that is not available, you will get a 'No Data Found' popup error.

Report Type	Data File	Report
Enrollment File	Yes	Yes
Award Rejects	No	Yes
Roster File	Yes	No
Accept / Reject	Yes	No
Payment Activity	No	Yes
Student Reconciliation	Yes	Yes
MCS Cal Grant Sync	No	Yes

Enrollment File - Data

This report contains a list of students who are ineligible or rejected from the Enrollment files.

The "Data File" version displays the ineligible or rejected codes followed by minimal student data. This version is utilized by the campuses to upload into their system.

Enrollment File – Report

The "Report" version displays the ineligible or rejected codes followed by a full description of the codes. It also displays the student's enrollment record that was submitted by the campus.

Roster File

The report provides a list of students currently on the school's roster. It holds the payments, adjustments, award amount, eligibility, income, other aid, etc...

Accept / Reject

The report provides a list of the students who had payments or corrections applied during the week. The report is broken down into 3 sections; Exception, Rejected & Accepted.

- o Exception Section:
    - ▪ This occurs when the system cannot define the type of transaction being applied. The transaction submitted is either invalid or there is no valid transaction for the record in the file. Most records that appear under this section stem from the attempt to:
        - • Apply a payment and correction to the same student

- Apply annual and term level corrections to the same student
  - o Rejected Section:
    - The payment or correction was rejected due to an edit in place for the transaction. The majority reject for not following the correct format.
  - o Accepted Section:
    - The payment or correction was accepted and applied to the student's record.

Payment Activity

The report provides the amount of funds disbursed to the campus, reconciled payment transactions & balances with a summary of the Year-to-Date activity. It is a cumulative report and displays the weekly activity from the first time a payment is applied through the most current information and up to year-end.

Admission File

This report is no longer in use as the UC and CSU campuses are no longer required to submit admission files to CSAC.

Award Rejects

The report provides a list of students who rejected during the award process due to mismatch data between the enrollment record and CSAC's system.

Students will continue to appear until their record is fixed.

Student Reconciliation

The report provides a list of students who have reconciled payments to date. Only payments greater than $0 will appear on the report.

Will be enhanced to include $0 payments and payment type.

MCS Cal Grant Sync

The report provides a list of students who went through the MCS/Cal Grant data match process that week. The report lists the Cal Grant /MCS awards and breaks down the "before" and "after" amounts for each student. Records that go through this process are only those that have an MCS enrollment record and a Cal Grant record.
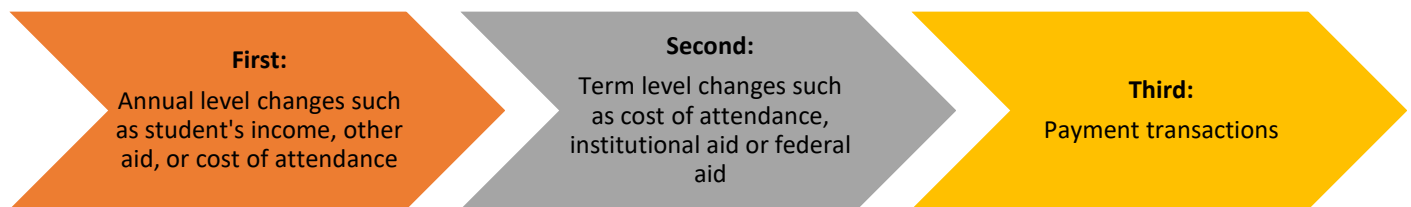
MCS Correction Guidelines

Introduction

The correction process is used to update student award information. Due to the limited funding available for MCS, CSAC must recalculate each student's award and provide any revised award values to the campus. The process of submitting corrections will allow CSAC to maintain and monitor the funding level each year, and ensure the program is not over subscribed. The two methods that are available to submit corrections are via the batch file upload process and the Online Payment Roster screen functionality. Both methods will be reconciled during the mid- week or week-end processing. Changes will be available the following Wednesday or Monday.

General Guidelines

When a student has been awarded the MCS, but new information is available that may affect the student's eligibility or award, the campus must follow the correction process to have CSAC recalculate that student's award. In general, the following hierarchy of changes should be applied:

1. Annual level changes, such as a student's total cost of attendance, total income or other aid, should be submitted before term level changes or payment transactions.
2. Term level changes, such as a student's institutional aid or federal aid, should be submitted before payment transactions.
3. Payment transactions should only be applied once a student's award information has been verified as accurate.

First:
Annual level changes such as student's income, other aid, or cost of attendance

Second:
Term level changes such as cost of attendance, institutional aid or federal aid

Third:
Payment transactions

MCS Payments and Corrections via Batch File Upload:

Uploading correction records for MCS follows the same process as uploading the MCS payment file. When uploading corrections, a campus will select the "Payment" File Type.

Within the file layout, field 42 (Transaction Type), the detailed record will hold either "P" – for Payment Information or "C" – for Correction.

Enrollment Status Code	Enrollment Status	Payment Amount	Term Eligibility Used
1	FT - (Pay)	Payment amount must equal the Max Term Award Amount	Semester = 50.00% Quarter = 33.33%
2	Less than HT - (Do Not Pay)	Payment amount must equal $0	Semester = 0.00% Quarter = 0.00%
3	Not Enrolled	Payment amount must equal $0	Semester = 0.00% Quarter = 0.00%
4	HT - (Pay)	Payment amount must equal half of the Max Term Award Amount (round to the nearest dollar*)	Semester = 25.00% Quarter = 16.66%
5	TT - (Pay)	Payment amount must equal 3/4 or 75% of the Max Term Award Amount (round to the nearest dollar*)	Semester = 37.50% Quarter = 25.00%

*.49 and below rounds down, and .50 and above rounds up

Adjustment Reason Code	Adjustment Reason	Payment Amount	Term Eligibility Used
1	Post Bacc	Payment amount must equal $0	Semester = 0.00% Quarter = 0.00%
2	SAP	Payment amount must equal $0	Semester = 0.00% Quarter = 0.00%
5	Refund/Adjusted Payment	Any payment amount is accepted as long as it's between $0 and up to the Max Term Award Amount	Semester = 50.00% Quarter = 33.33%
7	Other	Payment amount must equal $0	Semester = 0.00% Quarter = 0.00%

General Rules for uploading corrections via the payment file:

1. Correction and payment transactions may be submitted within the same file, but not for the same record. If the same record is submitted for a correction or payment, the system will only apply either one or possibly reject both transaction types.
2. When submitting a correction for a student, you may only submit an annual level correction or term level correction within the same file. Annual and term level corrections cannot be submitted for the same student record, in the same file, or else the transactions will be rejected. When possible, please follow the correction process hierarchy, to determine which correction to submit first. Multiple term level corrections are allowed within the same week as well as annual level corrections.
3. Term level corrections may only be submitted for "open" terms.

Correction Fields

When submitting corrections via a batch file upload, if any of the following fields are provided in the file, CSAC's system will assume a student's MCS award should be recalculated:

Annual Level Changes and Corrections:

Annual level changes should be performed when the campus has updated

information on total cost of attendance, total income, federal financial aid, institutional aid and state aid that could potentially impact the student's MCS award eligibility and amount. When annual level corrections are submitted, CSAC will recalculate the student's MCS award during the weekly processes and update the MCS roster accordingly the following Wednesday or Monday. If the student remains eligible, and their award value has gone up or down, new information will be available to the campus the following Wednesday or Monday. If the change results in a student no longer being eligible for their MCS award, the student will be removed from the roster.

Field #11 – Total Income: Only provide a value in this field if you are submitting a correction to previously reported Total Income. In addition to submitting a value in field 11, a value of "3" should be submitted in field 41 (noting a change in eligibility), and a value of "C" should be reported in field 42 (noting the Transaction Type as a "Correction"). See Scenario 9

Field #12 – Student's Federal Aid: Only provide a value in this field if you are submitting a correction to previously reported Federal Aid. In addition to submitting a value in field #12, a value of "3" should be submitted in field 41 (noting a change in eligibility), and a value of "C" should be reported in field 42 (noting the Transaction Type as a "Correction"). See Scenario 10

Field #13 – Student's Institutional Grants and Fee Waivers: Only provide a value in this field if you are submitting a correction to previously reported Institutional Grants and Fee Waivers. In addition to submitting a value in field #13, a value of "3" should be submitted in field 41 (noting a change in eligibility), and a value of "C" should be reported in field 42 (noting the Transaction Type as a "Correction"). See Scenario 10

Field #14 – Student's State Aid: Only provide a value in this field if you are submitting a correction to previously reported State Aid. In addition to submitting a value in field #14, a value of "3" should be submitted in field 41 (noting a change in eligibility), and a value of "C" should be reported in field 42 (noting the Transaction Type as a "Correction"). See Scenario 10

NOTE: *As a reminder, when reporting State Aid, at the annual or term level, Cal Grant awards should be **EXCLUDED** from any value reported by the campus. CSAC will identify if a student has a Cal Grant and factor that in during the award calculation.*

Field # 19 – Student's Annual Cost of Attendance: Only provide a value in this field if a correction is needed. In addition to submitting a value in field 19, a value of "3"

should be submitted in field 41 (noting a change in eligibility), and a value of "C" should be reported in field 42 (noting the Transaction Type as a "Correction"). See Scenario 8

Field #41 – Eligibility Change (for Academic Year): This field is always used when making corrections at an annual level. If there is a value provided in this field, then a value of "C" should be reported in field 42 (noting the Transaction Type as a "Correction"):

- The following data values result in the student being withdrawn from the campus roster:
    - 1 - Post Bacc
    - 2 - SAP
    - 4 - Not Enrolled
    - 5 - Other
    - 7 - Over Asset Ceiling

    By submitting one of these values, the student is considered no longer eligible for the MCS award unless other information is received by CSAC. The student's MCS award will be withdrawn, and the student will be removed from the roster.

    - If a payment exists for this student, the transaction will be rejected. The school is responsible for determining if the student should have received all or part of the payment. The school must address the payment change **PRIOR** to submitting one of the values.

- If the data value submitted is:
    - The value of 3 (Eligibility), then the school is required to provide one or more values in fields 11 through 14 (Total Income, Federal Aid, Institutional Aid, State Aid) and field 19 (Cost of Attendance). CSAC will use that new information to recalculate the student's award. If no new value is provided in one of the additional fields, then the recalculation will be performed using the existing values previously submitted.
    - The value of 8 (Add Teacher Credential Program/5th Year Program Flag), CSAC will recalculate the student's award amount at the annual level. The school must also provide an updated Cost of Attendance in Field 19, which needs to include the tuition/fees cost for TCP or 5th year programs.
    - The value of 9 (Remove TCP/5th Year Program), requires the school to provide an updated Cost of Attendance in field 19. CSAC will

recalculate the student's award amount at the annual level using the adjusted Cost of Attendance which does not include the tuition/fees cost for TCP or 5th year programs.

- If the data value submitted is a 3, 8 or 9 (Eligibility, Add TCP/5th Year Program or Remove TCP/5th Year Program) and a payment exists for this student, the award will be recalculated, and the school will be required to recertify the payment amount.

  NOTE: This includes records where the eligibility change or recalculation process results in the student no longer being eligible for MCS award consideration. In these cases, the student's MCS award will be set to $0.00, and the school will be required to recertify the $0.00 payment amount. After the recertification takes place, the student will be removed from the campus roster.

Term Level Changes:

These changes should be performed when the campus needs to update information on a specific term's cost of attendance, federal financial aid, institutional aid and state aid. CSAC will recalculate the student's MCS award for that term during the weekly processes and update the MCS roster accordingly the following Wednesday and Monday. After the recalculation, the term amounts may not equal since a specific term was re-evaluated. However, the sum of all terms amount will equal the annual MCS award amount.

Field #22/29/36 – Fall/Winter/Spring Adjustment Reason Code: Used to indicate term adjustment reasons. Valid content includes numeric values 1, 2, 3, 4, 5 and 7. Value 6 is used by CSAC to alert the campus that the term's payment amount requires recertification.

- If the school provides a value of **3 or 4 (Eligibility or Fees)**, then a value of "C" must also be submitted in field 42 (Transaction Type). If not, then the record will be rejected. If selecting 3 or 4, values must also be reported in fields 23-26/30-33/37-40. CSAC will use the new reported information to recalculate the student's award for the applicable term. The Annual Award Amount will be adjusted to reflect the new term amount.

- If the school provides a value of **1, 2, 5 or 7 (Post Bacc, SAP, Refund/Adjusted Payment or Other)**, then a value of "P" must also be submitted in field 42 (Transaction Type) with the related payment amount in fields 21/28/35. If not, then the record will be rejected.

- If the school submits a value of **1, 2, or 7 (Post Bacc, SAP or Other)**, then the school must also submit a value of zero in field 21/28/35 (Fall/Winter/Spring MCS Award Payment). This indicates that the student is not eligible for the term and should not be paid for the Fall/Winter/Spring term and should remain on their roster. Using the values of 1, 2 or 7 will reduce the term award amount to zero.

  NOTE: The ineligible term status of Post Bacc, SAP or Other should be applied to one term and not across the board. If the student is ineligible for the entire year, then the transaction needs to be applied at the annual level.

  NOTE 2: If ineligible status is applied across all terms, the record is removed from the roster. However, if the school submits an enrollment record to reconsider the student, the enrollment record will not be processed because the system reads the student as ineligible. This only happens when applied to all terms and not at the annual level. The school must contact CSAC to fix the record via a data maintenance.

If a payment has already been made for this student, the difference between the previous payment amount and the "zero" payment amount will be taken into consideration during the school reconciliation process.

Field #23/30/37 – Fall/Winter/Spring Cost of Attendance Amount: Used to adjust a student's term specific Cost of Attendance amount.

CSAC will provide a value in this field based on the annual Cost of Attendance amount divided by the number of terms.

If a value is reported in this field by the campus, it cannot be greater than the Annual Cost of Attendance amount and must also submit a "C" value in field 42 to indicate the transaction type is a Correction. In addition to field 42, an adjustment reason code of 4 (Fees) must be indicated in field 22/29/36 (for the Fall/Winter/Spring term). CSAC will use this information, along with other new values provided in fields 23-26 / 30-33 / 37-40, to recalculate the student's award for the term. If no new values are provided in these additional fields, then the recalculation will be performed using the existing values stored in the WebGrants database for those corresponding fields, plus the new value provided in this field. The recalculated term award will be used to

adjust the Maximum Annual MCS Award Amount (field 52).

Field #24/31/38 – Fall/Winter/Spring Federal Aid Amount: Used to adjust a student's term specific Federal Aid amount.

CSAC will provide a value in this field (the annual Federal Aid amount divided by the number of terms).

If a different value is reported in this field by the campus, it cannot exceed the annual Federal Aid amount. When reporting changes to the term Federal Aid amounts, you must also indicate a "C" in field 42 to indicate the transaction type is a Correction. In addition to field 42, an adjustment reason code of 3 (Eligibility) must also be reported in field 22/29/36 (for the Fall/Winter/Spring term).

Field #25/32/39 – Fall/Winter/Spring Institutional Aid Amount: Used to adjust a student's term specific Institutional Aid amount.

CSAC will provide a value in this field (the annual Institutional Aid Amount divided by the number of terms).

If a different value is reported in this field by the campus, it cannot exceed the annual Institutional Aid amount. When reporting changes to the term Institutional Aid amounts, you must also indicate a "C" in field 42 to indicate the transaction type is a Correction. In addition to field 42, an adjustment reason code of 3 (Eligibility) must also be reported in field 22/29/36 (for the Fall/Winter/Spring term).

Field #26/33/40 – Fall/Winter/Spring State Aid Amount: Used to adjust a student's term specific State Aid amount (excluding Cal Grant).

CSAC will provide a value in this field (the annual State Aid amount divided by the number of terms).

If a different value is reported in this field by the campus, it cannot exceed the annual State Aid amount. When reporting changes to the term State Aid amounts, you must also indicate a "C" in field 42 to indicate the transaction type is a Correction. In addition to field 42, an adjustment reason code of 3 (Eligibility) must also be reported in field 22/29/36 (for the Fall/Winter/Spring term).

NOTE*: As a reminder, when reporting State Aid, at the annual or term level, Cal Grant awards should be **EXCLUDED** from any value reported by the campus. CSAC will identify if a student has a Cal Grant and factor that in during the award calculation.*

Term Level Corrections – When Payments are Reconciled:

If the **data value submitted is 3 or 4 (Eligibility or Fees)** and a payment exists for the student, both the max term award and the term award will be recalculated, and the school will be required to recertify the payment amount.

When applying the recertify amount for a "Recertify Payment," the payment cannot be greater than the recalculated Max Term Award Amount. The amount must be less than or equal to the Max Term Award Amount.

NOTE: This includes records where the Eligibility/Fee change recalculation process results in an MCS Max Term Award Amount and the Term Award Amount = $0.00. In the instances where this particular term is the only term that the student is attending, the student's annual MCS award will also be set to $0.00, and the school will be required to recertify the $0.00 payment amount. After the recertification takes place, the student will be removed from the school's roster.

Recertify Payments

Students who have payments in a "Recertify Payment" status can be searched through the **Roster Screen** or found in the **MCS Roster File Report**. To recertify means the campus needs to go in and verify the new payment amount. Recertify happens when the student was previously paid for the term(s) and a correction was applied at the annual and/or term level.

The MCS/Cal Grant match process could also cause payments to go into a recertify status. The update to the student's record triggered the award to be recalculated which then alters the payment amount that was in place.

Online Payment Roster Screen:

Select the MCS Display Roster from the MCS menu. Enter the school code along with selecting the academic year, check the "Recertify Only" box and click on the Search button.

The system will display a list of students who have payments in a "Recertify Payment" status. The list of students can be exported by choosing the file type and selecting the Download Roster button.

A payment in this status is identified at the term level by having a [Recertify Payment] status display under the "Adj. Reason Code" field in red font.

NOTE: *If the campus does not have any existing payments in this status, the system will generate a message stating "No data found".*

In the example below, the student was originally paid at $160 for the Fall term. When the award was recalculated, it did so at a lower award amount of $60 for the Fall term. The new payment must now be recertified at the $60 amount. Payments being recertified must be based on the Max Term Award Amount.

Term Data

	FALL TERM	WINTER TERM	SPRING TERM
Enrollment Status	– Select One –	– Select One –	– Select One –
	[HT - (Pay)]	[]	[]
Max Term Award Amount	$ 60	$ 320	$ 320
	[$60]	[$320]	[$320]
Term Award Amount	$ 60	$ 320	$ 320
	[$60]	[$320]	[$320]
Adj. Reason Code	– Select One –	– Select One –	– Select One –
	[Recertify Payment]	[]	[]
Amount Paid/Verified	$	$	$
	[$160]	[$]	[$]
Cost of Attendance	$	$	$
	[$11695]	[$11695]	[$11695]
Federal Aid	$	$	$
	[$449]	[$448]	[$448]
Institutional Aid	$	$	$
	[$8384]	[$7384]	[$7383]
State Aid	$	$	$
	[$0]	[$0]	[$0]
Payment Status	Reconciled	Not Reconciled	Not Reconciled

MCS Roster File Report:

The **MCS Roster File Report** will display an adjustment reason code of "6" in Fields 22/29/36 (Fall/Winter/Spring Adjustment Reason Code) to show the terms' payment is in a "Recertify Payment" status.

Example: Fall Term in Recertify Status (Field 22 = 6):

```
001150120161111111111TESTCASE    DANIEL    1998010101100000975860000000000000000000001    010920005472005460054 0002736
001150120162222222222TESTCASE    ANDREW    W1998020203100001117760000000000000000000001   009000005472004500044 60002736
001150120163333333333TESTCASE    MELISSA   J1998030301100001085150000000000000000000001   009480005472004740047 0002736
001150120164444444444TESTCASE    ALLEN     H1998040402100000808360000000000000000000001   010920005472005460054 0002736
```

MCS Correction via the Online Payment Roster

All correction transactions can be handled through either the batch upload process or individually utilizing the MCS Online Payment Roster screen.

Below is an example of making an Annual Level change (Cost of Attendance) and a Term Level change (decreased Institutional Aid). For more descriptions of potential correction and/or payment scenarios, please reference pages 52 to 71 for the corresponding steps needed to complete the transaction. The steps are provided for the manual and payment file process.

Correction Process Examples:

Example 1: Adjusting a student's Cost of Attendance via the MCS Display Roster Screen (Annual Level Change)

From the MCS Display Roster section, select the student you would like to report a correction for. Then, on the Roster screen, select the following criteria:

- At the Transaction Type section, select the "Correction" radio button
- Select "Annual Data" radio button
- From the "Eligibility Change" drop down box, select "Eligibility"
- Enter the student's new Cost of Attendance in the "Cost of Attendance" field
- If applicable, report the ISIR transaction number associated with the correction
- Click the "Save" button

Student Demographics

Name		Cal Grant Award	$7390	Total Elig-%	300
CSAC ID		Max Award Amount	$1182	Used Elig-%	0
SSN No		Annual Award	$1182	Remain Elig-%	300
DOB		Asset Amount	$3000	Year Entered	2022
Education Level		TCP/5th Yr-Indicator		Student Contribution	$7898
				Parent Contribution	$4548

Transaction

📋 Open Page Instructions

[Payment History]

Transaction Type   ⦿ Correction ○ Payment

⦿ Annual Data ○ Term Data

Annual Data

Eligibility Change	Eligibility ▾	Total Income	$68472	$
Academic Year	2022 - 2023	Cost of Attendance	$19836	$ 25000
Open Terms	Fall, Winter, Spring	Federal Aid	$0	$
		Institutional Aid	$0	$
		State Aid	$0	$
		ISIR Tran #	02	

[Save] [Reset]

A pop-up box will confirm that your transaction has been saved. Once a transaction has been saved, the newly reported data will be reflected the following Wednesday or Monday after CSAC completes the processing of files.

Transaction

The MCS Student Award Payment History screen will provide information on any payments and/or corrections that have been processed for that student at both the annual and term level.

Example 2: Decreasing a Student's Institutional Aid to a Term (Term Level Change)

From the MCS Display Roster section, select the student you would like to report a correction for, and select the following criteria:

- At the Transaction Type section, select the "Correction" radio button
- Select "Term Data" radio button
- At the term level, select "Eligibility" from the Adj. Reason Code drop down and select "Eligibility"
- Enter the reduced Institutional Aid amount in the Institutional Aid field
- Click the "Save" button

Term Data

	FALL TERM		SPRING TERM	
Enrollment Status [ ]	-- Select One --		Enrollment Status [ ]	-- Select One --
Max Term Award Amount [$939]	$ 939		Max Term Award Amount [$939]	$ 939
Term Award Amount [$939]	$ 939		Term Award Amount [$939]	$ 939
Adj. Reason Code [ ]	Eligibility		Adj. Reason Code [ ]	-- Select One --
Amount Paid/Verified [$]	$ 0		Amount Paid/Verified [$]	$
Cost of Attendance [$12425]	$		Cost of Attendance [$12425]	$
Federal Aid [$1173]	$		Federal Aid [$1172]	$
Institutional Aid [$2871]	$ 1500		Institutional Aid [$2871]	$
State Aid [$0]	$		State Aid [$0]	$
Payment Status	**Not Reconciled**		Payment Status	**Not Reconciled**

Save   **Reset**

A pop-up box will confirm that your transaction has been saved. Once a transaction has been saved, the newly reported data will be reflected the following Wednesday or Monday after CSAC completes the processing of files.

If after saving the transactions you would like to delete the submission, you can do so by pulling up the student record again and selecting the radio button for the type of transaction that was applied (Payment or Correction). Once selected, click on the "Delete Transaction" button.

Note: *You can delete the transaction prior to processing. The transaction cannot be deleted after it has been processed.*

Once a correction has been processed, you can view it under the MCS Student Award Payment History Screen; or the MCS Display Roster screen, click on the "Payment History" link found in the Annual Data section.

The MCS Student Award Payment History screen will provide information on any payments and/or corrections that have been processed for that student at both the annual and term level.

The Roster File will also hold the latest information for the record.

Transaction

> - Select the transaction type to make corrections or payments.
> - If Correction type is selected, please choose annual data to make changes at the annual level or term data to make changes at the term level.
> - After making changes, save the data.   ✕

Transaction Type	⦿ Correction ○ Payment		Delete Transaction	Payment History
	○ Annual Data ○ Term Data			

Annual Data

Eligibility Change	-- Select One -- ▾	Total Income	$54226	$
Academic Year	**2022 - 2023**	Cost of Attendance	$24850	$
Open Terms	**Fall, Winter, Spring**	Federal Aid	$2345	$
		Institutional Aid	$5742	$
		State Aid	$0	$
		ISIR Tran #	02	

Results will be available on the following Monday or Wednesday. Schools can download the MCS Accept/Reject Report to verify if the posted transactions were accepted or rejected.

PAYMENTS

Posting of payments are based on the Max Term Award Amount. The Term Award Amount will display the payment amount applied.

Scenario	Annual or Term Level Transaction	MCS Display Roster Screen (Manual Process)	Batch – Payment/Correction File (Upload Process)

1. Posting Full-Time Payment
 	
-Payment amount must equal the max term award amount
 	
- A Full-Time payment will use the following eligibility for the term:
 	
Semester = 50.00%
Quarter = 33.33%
	Term	• Under the Transaction section, select Payment radio button
		
		• Under the Term Data section, select the term the payment will be applied to
		
		• Select "FT-(Pay)" from the Enrollment Status drop-down field
		
		• The Amount Paid/Verified field is automatically populated with the related payment amount for the term.
		
		• Hit the Save button
		
		Results:
		-On the Display Roster screen, the Enrollment Status field and the Amount Paid/Verified field will display [FT - (Pay)] and the related payment amount in red font [$1000]. The Payment Status for the term will display "**Reconciled**".
		-The Max Term Award Amount will remain.
		-The Term Award Amount will equal the payment amount applied.
		-On the Student Award Payment History screen, a line item will appear to reflect the payment posted.
			• Student's Fall/Winter/Spring Enrollment Status
			  o Fields 15/16/17 (Positions 92/93/94)
			  o Enter 1 for FT-(Pay)
			
			• Fall/Winter/Spring MCS Award Payment
			  o Fields 21/28/35 (Positions 112-116/151-155/190-194)
			  o Enter related payment amount for the term (01000)
			
			• Transaction Type
			  o Field 42 (Position 225)
			  o Enter P for "Payment Information"
			
			Results:
			The roster file will display "1" in Fields 15/16/17 and the payment amount in Fields 21/28/35.

| 2. Posting Half-Time Payment

-Payment amount must equal half the max term award amount

- A Half-Time payment will use the following eligibility for the term:

Semester = 25.00%
Quarter = 16.66% | Term | • Under the Transaction section, select Payment radio button

• Under the Term Data section, select the term the payment will be applied to

• Select "HT-(Pay)" from the Enrollment Status drop-down field

• The Amount Paid/Verified field is automatically populated with the related payment amount for the term.

• Hit the Save button

Results:
-On the Display Roster screen, the Enrollment Status field and the Amount Paid/Verified field will display [HT - (Pay)] and the related payment amount in red font [$500]. The Payment Status for the term will display "Reconciled".

-The Max Term Award Amount will remain.

-The Term Award Amount will equal the payment amount applied.

-On the Student Award Payment History screen, a line item will appear to reflect the payment posted. | • Student's Fall/Winter/Spring Enrollment Status
  o Fields 15/16/17 (Positions 92/93/94)
  o Enter 4 for HT-(Pay)

• Fall/Winter/Spring MCS Award Payment
  o Fields 21/28/35 (Positions 112-116/151-155/190-194)
  o Enter related payment amount for the term (00500)

• Transaction Type
  o Field 42 (Position 225)
  o Enter P for "Payment Information"

Results:
The roster file will display "4" in Fields 15/16/17 and the payment amount in Fields 21/28/35.

The related fields will also be updated based on the payment type and term it is applied to:

o Field 18 – Adjusted Annual MCS Award Amount (Position 95-99)

o Fields 20/27/34 - Fall/Winter/Spring MCS Award Amount (Position 107-111/146-150/185-189) |

| 3. Posting TT – ¾ Time Payment

-Payment amount must equal ¾ of the max term award amount

- A TT-¾ Time payment will use the following eligibility for the term:

Semester = 37.50%
Quarter = 25.00% | Term | • Under the Transaction section, select Payment radio button

• Under the Term Data section, select the term the payment will be applied to

• Select "TT – ¾ time - (Pay)" from the Enrollment Status drop-down field

• The Amount Paid/Verified field is automatically populated with the related payment amount for the term.

• Hit the Save button

Results:
-On the Display Roster screen, the Enrollment Status field and the Amount Paid/Verified field will display [TT - 3/4 time - (Pay)] and the related payment amount in red font [$750]. The Payment Status for the term will display "**Reconciled**".

-The Max Term Award Amount will remain.

-The Term Award Amount will equal the payment amount applied.

-On the Student Award Payment History screen, a line item will appear to reflect the payment posted. | • Student's Fall/Winter/Spring Enrollment Status
  o Fields 15/16/17 (Positions 92/93/94)
  o Enter 5 for TT – ¾ time - (Pay)

• Fall/Winter/Spring MCS Award Payment
  o Fields 21/28/35 (Positions 112-116/151-155/190-194)
  o Enter related payment amount for the term (00750)

• Transaction Type
  o Field 42 (Position 225)
  o Enter P for "Payment Information"

Results:
The roster file will display "5" in Fields 15/16/17 and the payment amount in Fields 21/28/35.

The related fields will also be updated based on the payment type and term it is applied to:

o Field 18 – Adjusted Annual MCS Award Amount (Position 95-99)

o Fields 20/27/34 - Fall/Winter/Spring MCS Award Amount (Position 107-111/146-150/185-189) |

| 4. Posting Less than HT Payment

-Payment amount must equal zero ($0)

- This payment type will not use any eligibility.

-This payment type will reduce Term Award Amount to zero but will maintain the Max Term Award Amount.

NOTE:
If this payment type is posted across all terms and/or combined with other payment types that reduces the term award to zero ($0), the student will be considered financially ineligible and may be removed from the school's roster. | Term | • Under the Transaction section, select Payment radio button

• Under the Term Data section, select the term the payment will be applied to

• Select "Less Than HT – (Do Not Pay)" from the Enrollment Status drop-down field

• The Amount Paid/Verified field is automatically populated with a $0 payment amount

• Hit the Save button

Results:
-On the Display Roster screen, the Enrollment Status field and the Amount Paid/Verified field will display [Less Than HT - (Do Not Pay)] and the related payment amount in red font [$0]. The Payment Status for the term will display "**Reconciled**".

-The Max Term Award Amount will remain.

-The Term Award Amount will equal the payment amount applied and the field will display [$0].

-On the Student Award Payment History screen, a line item will appear to reflect the payment posted. | • Student's Fall/Winter/Spring Enrollment Status
  ○ Fields 15/16/17 (Positions 92/93/94)
  ○ Enter 2 for Less Than HT – (Do Not Pay)

• Fall/Winter/Spring MCS Award Payment
  ○ Fields 21/28/35 (Positions 112-116/151-155/190-194)
  ○ Enter $0 payment amount for the term (00000)

• Transaction Type
  ○ Field 42 (Position 225)
  ○ Enter P for "Payment Information"

Results:
The roster file will display "2" in Fields 15/16/17 and the payment amount in Fields 21/28/35.

The related fields will also be updated based on the payment type and term it is applied to:

○ Field 18 – Adjusted Annual MCS Award Amount (Position 95-99)

○ Fields 20/27/34 - Fall/Winter/Spring MCS Award Amount (Position 107-111/146-150/185-189) |

5. Posting Not Enrolled Payment
 	
-Payment amount must equal zero ($0)
 	
- This payment type will not use any eligibility.
 	
-This payment type will reduce Term Award Amount to zero but will maintain the Max Term Award Amount.
 	
NOTE:
If this payment type is posted across all terms and/or combined with other payment types that reduces the term award to zero ($0), the student will be considered financially ineligible and may be removed from the school's roster.
	Term	• Under the Transaction section, select Payment radio button
		
		• Under the Term Data section, select the term the payment will be applied to
		
		• Select "Not Enrolled" from the Enrollment Status drop-down field
		
		• The Amount Paid/Verified field is automatically populated with a $0 payment amount
		
		• Hit the Save button
		
		Results:
		-On the Display Roster screen, the Enrollment Status field and the Amount Paid/Verified field will display [Not Enrolled] and the related payment amount in red font [$0]. The Payment Status for the term will display "**Reconciled**".
		
		-The Max Term Award Amount will remain.
		
		-The Term Award Amount will equal the payment amount applied and the field will display [$0].
		
		-On the Student Award Payment History screen, a line item will appear to reflect the payment posted.
			• Student's Fall/Winter/Spring Enrollment Status
			  ○ Fields 15/16/17 (Positions 92/93/94)
			  ○ Enter 3 for Not Enrolled
			
			• Fall/Winter/Spring MCS Award Payment
			  ○ Fields 21/28/35 (Positions 112-116/151-155/190-194)
			  ○ Enter $0 payment amount for the term (00000)
			
			• Transaction Type
			  ○ Field 42 (Position 225)
			  ○ Enter P for "Payment Information"
			
			Results:
			The roster file will display "3" in Fields 15/16/17 and the payment amount in Fields 21/28/35.
			
			The related fields will also be updated based on the payment type and term it is applied to:
			
			○ Field 18 – Adjusted Annual MCS Award Amount (Position 95-99)
			
			○ Fields 20/27/34 - Fall/Winter/Spring MCS Award Amount (Position 107-111/146-150/185-189)

6. Posting Refund/Adjusted Payment
 	
-This option allows campuses to post a zero ($0) payment amount or an amount that is less than the max term award amount.
 	
If a payment is posted greater than $0, it will use the following eligibility for the term:
 	
Semester = 50.00%
Quarter = 33.33%
 	
NOTE:
CSAC recommends that schools use the Enrollment Status options to post payments as provided under Scenarios 1-5.
	Term	• Under the Transaction section, select Payment radio button
		
		• Under the Term Data section, select the term the payment will be applied to
		
		• Select "Refund/Adjusted Payment" from the Adj. Reason Code drop-down field
		
		• The Amount Paid/Verified field will open to allow the campus to input the payment amount
		
		• Hit the Save button
		
		Results:
		-On the Display Roster screen, the Adj. Reason Code field will display [Refund/Adjusted Payment] and the related payment amount in red font [$325]. The Payment Status for the term will display "**Reconciled**".
		
		-The Max Term Award Amount will remain.
		
		-The Term Award Amount will equal the payment amount applied.
		
		-On the Student Award Payment History screen, a line item will appear to reflect the payment posted.
			• Fall/Winter/Spring MCS Award Payment
			  o Fields 21/28/35 (Positions 112-116/151-155/190-194)
			  o Enter related payment amount for the term (from 00000 up to term award amount, i.e., 00325)
			
			• Fall/Winter/Spring Adjustment Reason Code
			  o Fields 22/29/36 (Positions 117/156/195)
			  o Enter 5 for Refund/Adjusted Payment
			
			• Transaction Type
			  o Field 42 (Position 225)
			  o Enter P for "Payment Information"
			
			Results:
			The roster file will display "5" in Fields 22/29/36 and the payment amount in Fields 21/28/35.
			
			The related fields will also be updated based on the payment type and term it is applied to:
			
			o Field 18 – Adjusted Annual MCS Award Amount (Position 95-99)
			
			o Fields 20/27/34 - Fall/Winter/Spring MCS Award Amount (Position 107-111/146-150/185-189)

| 7. Posting of Post Bacc, SAP and Other **(Ineligible term status)** **NOTE:** CSAC recommends using the transaction for one term and not apply it across all terms. If the student is ineligible for the entire year, use the annual level transaction to withdraw the student from the roster (see Scenario 11). | Term | • Under the Transaction section, select Payment radio button

• Under the Term Data section, select the term the payment will be applied to

• Select either "Post Bacc, SAP or Other" from the Adj. Reason Code drop-down field

• The Amount/Paid Verified field will automatically populate with a $0 payment amount

• Hit the Save button

Results:
-On the Display Roster screen, the Adj. Reason Code field will display the following based on the type of payment posted, [Post Bacc] , [SAP] , [Other] and the related payment amount in red font [$0]. The Payment Status for the term will display "**Reconciled**".

-The Max Term Award Amount will remain.

-The Term Award Amount will equal the payment amount applied and the field will display [$0].

-On the Student Award Payment History screen, a line item will appear to reflect the payment posted.

NOTE:
If a reconciled payment exists, the payment will be reversed out from the term. The payment amount will also be reversed from the overall campus balance. The amount that was reversed can be viewed under the MCS Payment Activity Report. | • Fall/Winter/Spring MCS Award Payment
   o Fields 21/28/35 (Positions 112-116/151-155/190-194)
   o Enter related payment amount for the term (00000)

• Fall/Winter/Spring Adjustment Reason Code
   o Fields 22/29/36 (Positions 117/156/195)
      ▪ Enter 1 for Post Bacc
      ▪ Enter 2 for SAP
      ▪ Enter 7 for Other

• Transaction Type
   o Field 42 (Position 225)
   o Enter P for "Payment Information"

Results:
The roster file will display "1, 2 or 7" in Fields 22/29/36 and the payment amount in Fields 21/28/35.

The related fields will also be updated based on the payment type and term it is applied to:

o Field 18 – Adjusted Annual MCS Award Amount (Position 95-99)

o Fields 20/27/34 - Fall/Winter/Spring MCS Award Amount (Position 107-111/146-150/185-189) |

CORRECTIONS

A correction will recalculate the MCS award. If an annual correction is posted, the annual award will be recalculated. If a term correction is posted, only the term will be recalculated. This may also result in having payments in a recertify status if the term(s) have existing reconciled payments when the correction was applied.

Scenario	Annual or Term Level Transaction	MCS Display Roster Screen (Manual Process)	Batch – Payment/Correction File (Upload Process)
8. Cost of Attendance Update - The student's annual award will be recalculated using the new Cost of Attendance amount. The student's new award may be higher, lower or zero based on the new amount provided. -This update may result in the student being found financially ineligible and removed from the roster. **NOTE:** Multiple annual level changes can be made in the same submission. For example, the Cost of Attendance, Total Income and all three other aid amounts can be updated and submitted as one transaction. These are considered annual level changes and use the "Correction" transaction type.	Annual	• Under the Transaction section, select Correction radio button • Select Annual Data radio button • Under the Annual Data section, select "Eligibility" from the Eligibility Change drop-down field • Enter the new amount in the Cost of Attendance field • Hit the Save button Results: -On the Display Roster screen, the new amount will display in the Cost of Attendance field. • Under the Student Demographics section, the new annual award amount displays on the Max Award Amount and Annual Award fields. • Under the Term Data section, the Max Term Award Amount and the Term Award Amount fields will display the new term award. -On the Student Award Payment History screen, a line item will appear to reflect the annual correction posted. "AY" displays under the Term column.	• Annual Cost of Attendance 　○ Field 19 (Position 100-106) 　○ Enter new Cost of Attendance amount (0025378) • Eligibility Change 　○ Field 41 (Position 224) 　○ Enter 3 for Eligibility Change • Transaction Type 　○ Field 42 (Position 225) 　○ Enter C for "Correction" Results: The roster file will display the new Cost of Attendance amount in Field 19. The new award amounts will also display in the following fields: ○ Field 18 - Adjusted Annual MCS Award Amount (Position 95-99) ○ Fields 20/27/34 - Fall/Winter/Spring MCS Award Amount (Position 107-111/146-150/185-189) ○ Fields 23/30/37 - Fall/Winter/Spring Cost of Attendance (Position 118-124/157-163/196-202) ○ Field 52 - Maximum Annual MCS Award Amount (Position 262-266) ○ Fields 55/56/57 - Maximum Fall/Winter/Spring MCS Award Amount (Position 279-283/284-288/289-293)

9. Total Income Update	Annual	• Under the Transaction section, select Correction radio button	• ISIR/Cal ISIR Transaction Number used for Financial Aid determination
-This update may result in the student being found financially ineligible and removed from the roster.		• Select Annual Data radio button	o Field 9 (Position 58-59) o Enter new ISIR/Cal ISIR Transaction Number (02)

NOTE:
Multiple annual level changes can be made in the same submission. For example, the Cost of Attendance, Total Income and all three other aid amounts can be updated and submitted as one transaction. These are considered annual level changes and use the "Correction" transaction type.
		• Under the Annual Data section, select "Eligibility" from the Eligibility Change drop-down field
		
		• Enter the new amount in the Total Income field
		
		• Enter the ISIR Txn number related to the change in the ISIR Tran # field.
		
		• Hit the Save button
		
		Results:
		-On the Display Roster screen, the new amount will display in the Total Income field.
		
		• Under the Student Demographics section, the new annual award amount displays on the Max Award Amount and Annual Award fields.
		
		• Under the Term Data section, the Max Term Award Amount and the Term Award Amount fields will display the new term award.
		
		-On the Student Award Payment History screen, a line item will appear to reflect the annual correction posted. "AY" displays under the Term column.
			• Total Income
			   o Field 11 (Position 61-70)
			   o Enter new Total Income amount (0000052380)
			
			• Eligibility Change
			   o Field 41 (Position 224)
			   o Enter 3 for Eligibility Change
			
			• Transaction Type
			   o Field 42 (Position 225)
			   o Enter C for "Correction"
			
			Results:
			The roster file will display the new Total Income amount in Field 11 and the ISIR/Cal ISIR Txn number used in Field 9. The new award amounts will also display in the following fields:
			
			o Field 18 - Adjusted Annual MCS Award Amount (Position 95-99)
			
			o Fields 20/27/34 - Fall/Winter/Spring MCS Award Amount (Position 107-111/146-150/185-189)
			
			o Field 52 - Maximum Annual MCS Award Amount (Position 262-266)
			
			o Fields 55/56/57 - Maximum Fall/Winter/Spring MCS Award Amount (Position 279-283/284-288/289-293)

| **10. Other Aid Update**

Other Aid consists of changes to Federal Aid, Institutional Aid and State Aid*.

Do not include Cal Grant awards as part of the State Aid. If the student has an existing Cal Grant, CSAC's system will factor it in when it recalculates.

-This update may result in the student being found financially ineligible and removed from the roster.

NOTE:
Multiple annual level changes can be made in the same submission. For example, the Cost of Attendance, Total Income and all three other aid amounts can be updated and submitted as one transaction. These are considered annual level changes and use the "Correction" transaction type. | Annual | • Under the Transaction section, select Correction radio button

• Select Annual Data radio button

• Under the Annual Data section, select "Eligibility" from the Eligibility Change drop-down field

• Enter the new aid amount in the related field:

    o Federal Aid
    o Institutional Aid
    o State Aid

• Hit the Save button

Results:
-On the Display Roster screen, the new amount will display in the fields that were updated.

• Under the Student Demographics section, the new annual award amount displays on the Max Award Amount and Annual Award fields.

• Under the Term Data section, the Max Term Award Amount and the Term Award Amount fields will display the new term award.

-On the Student Award Payment History screen, a line item will appear to reflect the annual correction posted. "AY" displays under the Term column. | • Student's Federal Aid
    o Field 12 (Position 71-77)
    o Enter new Federal Aid amount (0006895)

AND/OR

• Student's Institutional Grants and Fee Waivers
    o Field 13 (Position 78-84)
    o Enter new Institutional Aid amount (0014901)

AND/OR

• Student's State Aid
    o Field 14 (Position 85-91)
    o Enter new Federal Aid amount (0002333)

• Eligibility Change
    o Field 41 (Position 224)
    o Enter 3 for Eligibility Change

• Transaction Type
    o Field 42 (Position 225)
    o Enter C for "Correction"

Results:
The roster file will display the new aid amount in Field(s) 12, 13, 14. The new award amounts will also display in the following fields:

o Field 18 - Adjusted Annual MCS Award Amount (Position 95-99)

o Fields 20/27/34 - Fall/Winter/Spring MCS Award Amount (Position 107-111/146-150/185-189)

o Field 52 - Maximum Annual MCS Award Amount (Position 262-266)

o Fields 55/56/57 - Maximum Fall/Winter/Spring MCS Award Amount (Position 279-283/284-288/289-293) |

| 11. Not Eligible for MCS (Withdraw)

Ineligible Reason Types:
- Post Bacc
- SAP
- Not Enrolled
- Other
- Over Asset Ceiling

-Student will be withdrawn from the roster.

NOTE:
If the student has an existing reconciled payment, the transaction will be rejected. Payment(s) will need to be removed first before withdrawing the student. | Annual | • Under the Transaction section, select Correction radio button

• Select Annual Data radio button

• Under the Annual Data section, select one of the following options from the Eligibility Change drop-down field

    o Post Bacc
    o SAP
    o Not Enrolled
    o Other
    o Over Asset Ceiling

• Hit the Save button

Results:
-The student will no longer appear in the Display Roster screen.

-The Student Award Summary screen will display "WITHDRAWN" under the Award Status column.

-On the Student Award Payment History screen, a line item will appear to reflect the annual correction posted. "AY" displays under the Term column. The withdrawal reason type will appear under the Adj. Reason column. | • Eligibility Change
    o Field 41 (Position 224)
    o Enter one of the following options:
       ▪ 1 - Post Bacc
       ▪ 2 - SAP
       ▪ 4 - Not Enrolled
       ▪ 5 - Other
       ▪ 7 - Over Asset Ceiling

• Transaction Type
    o Field 42 (Position 225)
    o Enter C for "Correction"

Results:
The student will no longer exist in the roster data file. |
| --- | --- | --- | --- |

| 12. Educational Level Changes

-Educational Level (EL) changes are only allowed within the initial academic year used to establish a student's original EL.

-Changes to the EL will not be allowed in subsequent academic years.

-This function only allows EL changes between 0 – 4.

NOTE:
EL changes to a 5 are only allowed if the student is in a Teacher Credential Program or 5th Year eligible program (TCP/5th YR). See Scenarios 13 and 14 to add TCP or 5th Year program.

EL change may also result in the annual award being recalculated due to the correction. | Annual | • Under the Transaction section, select Correction radio button

• Select Annual Data radio button

• Under the Annual Data section, select "Educational Level" from the Eligibility Change drop-down field

• A new field displays, titled Educational Level

• Select the new Educational Level from the drop-down options:

   o 1st year, never attended (EL 0)
   o 1st year, attended college before (EL1)
   o 2nd year/sophomore (EL 2)
   o 3rd year/junior (EL 3)
   o 4th year/senior (EL 4)

• Hit the Save button

Results:
-On the Display Roster screen, the Educational Level will display under the Student Demographics section. The Total Elig % and Remain Elig % fields will be updated accordingly.

-On the Student Award Summary screen, the Educational Level and the Total and Remaining Eligibility fields will be updated accordingly.

-On the Student Award Payment History screen, a line item will appear to reflect the EL correction posted. "AY" displays under the Term column and "Educational Level" under the Adj. Reason column. | • Eligibility Change
   o Field 41 (Position 224)
   o Enter 0 for Educational Level Change

• Transaction Type
   o Field 42 (Position 225)
   o Enter C for "Correction"

• Educational Level
   o Field 46 (Position 233)
   o Enter a value between 0 - 4

Results:
The roster file will display the new Educational Level with the new eligibility amounts in the following fields:

   o Field 46 – Educational Level (Position 233)

   o Field 47 –Total Eligibility (Position 234-238)

   o Field 49 –Remaining Eligibility (Position 244-248)

   Eligibility display examples:
   400% = 40000
   125% = 12500
   50% = 05000
   33.33% = 03333
   5% = 00500 |

| 13. Adding the Teacher Credential Program (TCP)

-TCP is added at the annual level.

-Educational Level will change to EL 5

NOTE:
Cost of Attendance is required each time TCP/5th Year is added or removed. | Annual | • Under the Transaction section, select Correction radio button

• Select Annual Data radio button

• Under the Annual Data section, select "Add TCP/5th Year" from the Eligibility Change drop-down field

• A new field displays titled TCP or 5th Year

• Select Add TCP from the drop-down options

• Enter the new amount in the Cost of Attendance field

• Hit the Save button

Results:
-On the Display Roster screen, under the Student Demographics section, the TCP/5th Yr-Indicator field will display "TCP-Yes". The Educational Level field will display "5th year/other undergraduate". The Total Elig % and Remain Elig % fields will be updated accordingly. Under the Annual data section, the Cost of Attendance displays the amount entered for the TCP.

-On the Student Award Summary screen, the TCP Flag field will display "Yes". The Educational Level and the Total and Remaining Eligibility fields will be updated accordingly.

-On the Student Award Payment History screen, a line item will appear to reflect the TCP. "AY" displays under the Term column and "Add TCP/5th Year" under the Adj. Reason column. | • Annual Cost of Attendance
 ○ Field 19 (Position 100-106)
 ○ Enter new Cost of Attendance amount (0032148)

• Eligibility Change
 ○ Field 41 (Position 224)
 ○ Enter 8 for Add Teacher Credential Program Flag (TCP) / 5th Yr Program Flag

• Transaction Type
 ○ Field 42 (Position 225)
 ○ Enter C for "Correction"

• Teacher Credential Program (TCP) /Fifth Year of 5-Year Program Flag
 ○ Field 43 (Position 226)
 ○ Enter a value of 1 for Yes – TCP

Results:
The roster file will display the TCP related values in the following fields:

○ Field 19 – Annual Cost of Attendance (Position 100-106)
○ Field 43 – Teacher Credential Program (TCP) /Fifth Year of 5-Year Program Flag (Position 226)
○ Field 46 – Educational Level (Position 233)
○ Field 47 –Total Eligibility (Position 234-238)
○ Field 49 –Remaining Eligibility (Position 244-248)

The new award amounts will also display in the following fields:

○ Field 18 - Adjusted Annual MCS Award Amount (Position 95-99)
○ Fields 20/27/34 - Fall/Winter/Spring MCS Award Amount (Position 107-111/146-150/185-189)
○ Fields 23/30/37 - Fall/Winter/Spring Cost of Attendance (Position 118-124/157-163/196-202)
○ Field 52 - Maximum Annual MCS Award Amount (Position 262-266)
○ Fields 55/56/57 - Maximum Fall/Winter/Spring MCS Award Amount (Position 279-283/284-288/289-293) |

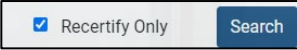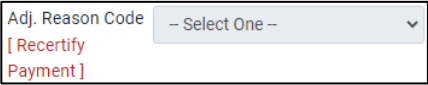| 14. Adding the 5th Year Program	Annual	- Under the Transaction section, select Correction radio button - Select Annual Data radio button - Under the Annual Data section, select "Add TCP/5th Year" from the Eligibility Change drop-down field - A new field displays titled TCP or 5th Year - Select Add 5th Year from the drop-down options - Enter the new amount in the Cost of Attendance field - Hit the Save button	- Annual Cost of Attendance - Field 19 (Position 100-106) - Enter new Cost of Attendance amount (0032148) - Eligibility Change - Field 41 (Position 224) - Enter 8 for Add Teacher Credential Program Flag (TCP) / 5th Yr Program Flag - Transaction Type - Field 42 (Position 225) - Enter C for "Correction" - Teacher Credential Program (TCP) /Fifth Year of 5-Year Program Flag - Field 43 (Position 226) - Enter a value of 3 for Yes – 5th-Yr
-Educational Level will change to EL 5 -If the campus does not have an eligible 5th Year program, the transaction will be rejected. **NOTE:** Cost of Attendance is required each time TCP/5th Year is added or removed.		Results: -On the Display Roster screen, under the Student Demographics section, the TCP/5th Yr-Indicator field will display "5th Year - Yes". The Educational Level field will display "5th year/other undergraduate". The Total Elig % and Remain Elig % fields will be updated accordingly. Under the Annual data section, the Cost of Attendance displays the amount entered for the 5th Year program. -On the Student Award Summary screen, the 5th Yr Program field will display "Yes". The Educational Level and the Total and Remaining Eligibility fields will be updated accordingly. -On the Student Award Payment History screen, a line item will appear to reflect the TCP. "AY" displays under the Term column and "Add TCP/5th Year" under the Adj. Reason column.	Results: The roster file will display the 5th Year related values in the following fields: - Field 19 – Annual Cost of Attendance (Position 100-106) - Field 43 – Teacher Credential Program (TCP) /Fifth Year of 5-Year Program Flag (Position 226) - Field 46 – Educational Level (Position 233) - Field 47 –Total Eligibility (Position 234-238) - Field 49 –Remaining Eligibility (Position 244-248) The new award amounts will also display in the following fields: - Field 18 - Adjusted Annual MCS Award Amount (Position 95-99) - Fields 20/27/34 - Fall/Winter/Spring MCS Award Amount (Position 107-111/146-150/185-189) - Fields 23/30/37 - Fall/Winter/Spring Cost of Attendance (Position 118-124/157-163/196-202) - Field 52 - Maximum Annual MCS Award Amount (Position 262-266) - Fields 55/56/57 - Maximum Fall/Winter/Spring MCS Award Amount (Position 279-283/284-288/289-293)

| 15. Removing the Teacher Credential or 5th Year Programs (TCP/5th Year)

NOTE:
Cost of Attendance is required each time TCP/5th Year is added or removed. | Annual | • Under the Transaction section, select Correction radio button

• Select Annual Data radio button

• Under the Annual Data section, select "Remove TCP/5th Year" from the Eligibility Change drop-down field

• Enter the new amount in the Cost of Attendance field

• Hit the Save button

Results:
-On the Display Roster screen, under the Student Demographics section, the TCP/5th Yr-Indicator field will display "No". The Educational Level field will display the prior EL that was in place. The Total Elig % and Remain Elig % fields will be updated accordingly. Under the Annual data section, the Cost of Attendance displays the amount entered for the program.

-On the Student Award Summary screen, the TCP Flag or 5th Yr Program fields will display "No". The Educational Level and the Total and Remaining Eligibility fields will be updated accordingly.

-On the Student Award Payment History screen, a line item will appear to reflect the removal of the TCP or 5th Year program. "AY" displays under the Term column and "Remove TCP/5th Year" under the Adj. Reason column. | • Annual Cost of Attendance
  o Field 19 (Position 100-106)
  o Enter new Cost of Attendance amount (0025378)

• Eligibility Change
  o Field 41 (Position 224)
  o Enter 9 for Remove TCP/5th-Yr Program

• Transaction Type
  o Field 42 (Position 225)
  o Enter C for "Correction"

• Teacher Credential Program (TCP) /Fifth Year of 5-Year Program Flag
  o Field 43 (Position 226)
  o Enter a value of 2 for No – TCP/5th-Yr

Results:
The roster file will display the related values in the following fields:

o Field 19 – Annual Cost of Attendance (Position 100-106)
o Field 43 – Teacher Credential Program (TCP) /Fifth Year of 5-Year Program Flag (Position 226)
o Field 46 – Educational Level (Position 233)
o Field 47 –Total Eligibility (Position 234-238)
o Field 49 –Remaining Eligibility (Position 244-248)

The new award amounts will also display in the following fields:

o Field 18 - Adjusted Annual MCS Award Amount (Position 95-99)
o Fields 20/27/34 - Fall/Winter/Spring MCS Award Amount (Position 107-111/146-150/185-189)
o Fields 23/30/37 - Fall/Winter/Spring Cost of Attendance (Position 118-124/157-163/196-202)
o Field 52 - Maximum Annual MCS Award Amount (Position 262-266)
o Fields 55/56/57 - Maximum Fall/Winter/Spring MCS Award Amount (Position 279-283/284-288/289-293) |

16. Cost of Attendance Update to Fall, Winter Spring Terms
 	
-Only the term(s) that was updated will be recalculated.
 	
-This update may result in the student being found financially ineligible for the term. If found financially ineligible for all terms, the student will be removed from the roster.
 	
NOTE:
Multiple term level changes can be made in the same submission. For example, the Cost of Attendance and all three other aid amounts can be updated and submitted as one transaction. These are considered term level changes and use the "Correction" transaction type.
	Term	• Under the Transaction section, select Correction radio button
		
		• Select Term Data radio button
		
		• Under the Term Data section and the term you will be updating, select "Fees" from the Adj. Reason Code drop-down field
		
		• Enter the new amount in the Cost of Attendance field
		
		• Hit the Save button
		
		Results:
		-On the Display Roster screen, the new amount will display in the Cost of Attendance field under the Annual Data and Term Data sections.
		
		• Under the Student Demographics section, the new annual award amount displays on the Max Award Amount and Annual Award fields.
		
		• Under the Term Data section, the Max Term Award Amount and the Term Award Amount fields will display the new term award.
		
		-On the Student Award Payment History screen, a line item will appear to reflect the term level correction posted. Under the Term column, the related term updated displays with "Fees" under the Adj Reason column.
			• Fall/Winter/Spring Adjustment Reason Code
			   o Field 22/29/36 (Position 117/156/195)
			   o Enter 4 for Fees
			
			• Fall/Winter/Spring Cost of Attendance
			   o Field 23/30/37 (Position 118-124/157-163/196-202)
			   o Enter new Cost of Attendance amount for the term (0012546)
			
			• Transaction Type
			   o Field 42 (Position 225)
			   o Enter C for "Correction"
			
			Results:
			The roster file will display the related values in the following fields:
			
			o Field 18 - Adjusted Annual MCS Award Amount (Position 95-99)
			
			o Field 19 – Cost of Attendance (Position 100-106)
			
			o Fields 20/27/34 - Fall/Winter/Spring MCS Award Amount (Position 107-111/146-150/185-189)
			
			o Fields 23/30/37 - Fall/Winter/Spring Cost of Attendance (Position 118-124/157-163/196-202)
			
			o Field 52 - Maximum Annual MCS Award Amount (Position 262-266)
			
			o Fields 55/56/57 - Maximum Fall/Winter/Spring MCS Award Amount (Position 279-283/284-288/289-293)

17. Other Aid Update to Fall, Winter, Spring Terms	Term	• Under the Transaction section, select Correction radio button	• Fall/Winter/Spring Adjustment Reason Code
			   o Field 22/29/36 (Position 117/156/195)
			   o Enter 3 for Eligibility

17. Other Aid Update to Fall, Winter, Spring Terms

Other Aid consists of changes to Federal Aid, Institutional Aid and State Aid*.

Do not include Cal Grant awards as part of the State Aid. If the student has an existing Cal Grant, CSAC's system will factor it in when it recalculates.

-Only the term(s) that was updated will be recalculated.

-This update may result in the student being found financially ineligible for the term. If found financially ineligible for all terms, the student will be removed from the roster.

NOTE:
Multiple term level changes can be made in the same submission. For example, the Cost of Attendance and all three other aid amounts can be updated and submitted as one transaction. These are considered term level changes and use the "Correction" transaction type.

Term

• Under the Transaction section, select Correction radio button

• Select Term Data radio button

• Under the Term Data section and the term you will be updating, select "Eligibility" from the Adj. Reason Code drop-down field

• Enter the new aid amount in the related fields:

   o Federal Aid
   o Institutional Aid
   o State Aid

• Hit the Save button

Results:
-On the Display Roster screen, under the Annual Data and Term Data sections, the new amount will display in the related other aid field that was updated.

• Under the Student Demographics section, the new annual award amount displays on the Max Award Amount and Annual Award fields.

• Under the Term Data section, the Max Term Award Amount and the Term Award Amount fields will display the new term award.

-On the Student Award Payment History screen, a line item will appear to reflect the term level correction posted. Under the Term column, the related term updated displays with "Eligibility" under the Adj Reason column.

• Fall/Winter/Spring Adjustment Reason Code
   o Field 22/29/36 (Position 117/156/195)
   o Enter 3 for Eligibility

• Fall/Winter/Spring Federal Aid Amount
   o Field 24/31/38 (Position 125-131/164-170/203-209)
   o Enter new Federal Aid amount for the term (0001948)

AND/OR

• Fall/Winter/Spring Institutional Aid Amount
   o Field 25/32/39 (Position 132-138/171-177/210-216)
   o Enter new Institutional Aid amount (0001040)

AND/OR

• Fall/Winter/Spring State Aid Amount
   o Field 26/33/40 (Position 139-145/178-184/217-223)
   o Enter new State Aid amount (0000556)

• Transaction Type
   o Field 42 (Position 225)
   o Enter C for "Correction"

Results:
The roster file will display the related values in the following fields:

o Field 18 - Adjusted Annual MCS Award Amount (Position 95-99)
o Fields 20/27/34 - Fall/Winter/Spring MCS Award Amount (Position 107-111/146-150/185-189)
o Field 24/31/38 - Fall/Winter/Spring Federal Aid Amount (Position 125-131/164-170/203-209)
o Field 25/32/39 - Fall/Winter/Spring Institutional Aid Amount (Position 132-138/171-177/210-216)
o Field 26/33/40 - Fall/Winter/Spring State Aid Amount (Position 139-145/178-184/217-223)
o Field 52 - Maximum Annual MCS Award Amount (Position 262-266)
o Fields 55/56/57 - Maximum Fall/Winter/Spring MCS Award Amount (Position 279-283/284-288/289-293)

| 18. Reinstating a Term

-This function will recalculate a term that does not have an award (Max and Term Award Amounts = $0)

-Cost of Attendance amount required to recalculate the term. If the term has other aid being updated, that can also be updated at the same time. | Term | • Under the Transaction section, select Correction radio button

• Select Term Data radio button

• Under the Term Data section, select "Fees" from the Adj. Reason Code drop-down field

• Enter the Cost of Attendance amount

• If there are updates to the other aid, enter the amount in the related fields:

    o Federal Aid
    o Institutional Aid
    o State Aid

• Hit the Save button

Results:
-On the Display Roster screen, under the Annual Data and Term Data sections, the new amount(s) will display for the Cost of Attendance and the other aid (if it was updated).

• Under the Student Demographics section, the new annual award amount displays on the Max Award Amount and Annual Award fields.

• Under the Term Data section, the Max Term Award Amount and the Term Award Amount fields will display the new term award. The amounts entered to recalculate the term will also display.

-On the Student Award Payment History screen, a line item will appear to reflect the term level correction posted. Under the Term column, the related term updated displays with "Fees" under the Adj Reason column. | • Fall/Winter/Spring Adjustment Reason Code
    o Field 22/29/36 (Position 117/156/195)
    o Enter 4 for Fees

• Fall/Winter/Spring Cost of Attendance
    o Field 23/30/37 (Position 118-124/157-163/196-202)
    o Enter Cost of Attendance amount for the term (0012750)

If there are updates to the other aid, enter the amount in the related fields:

    o Fall/Winter/Spring Federal Aid Amount; Field 24/31/38 (Position 125-131/164-170/203-209)
    o Fall/Winter/Spring Institutional Aid Amount; Field 25/32/39 (Position 132-138/171-177/210-216)
    o Fall/Winter/Spring State Aid Amount; Field 26/33/40 (Position 139-145/178-184/217-223)

• Transaction Type
    o Field 42 (Position 225)
    o Enter C for "Correction"

Results:
The roster file will display the related values in the following fields:

o Field 18 - Adjusted Annual MCS Award Amount (Position 95-99)
o Field 19 – Annual Cost of Attendance (Position 100-106)
o Field 20/27/34 - Fall/Winter/Spring MCS Award Amount (Position 107-111/146-150/185-189)
o Field 23/30/37 - Fall/Winter/Spring Cost of Attendance (Position 118-124/157-163/196-202)
o Field 52 - Maximum Annual MCS Award Amount (Position 262-266)
o Fields 55/56/57 - Maximum Fall/Winter/Spring MCS Award Amount (Position 279-283/284-288/289-293)

If the other aid was updated, the following fields will display the new value(s):
o Field 24/31/38 - Fall/Winter/Spring Federal Aid Amount (Position 125-131/164-170/203-209)
o Field 25/32/39 - Fall/Winter/Spring Institutional Aid Amount (Position 132-138/171-177/210-216)
o Field 26/33/40 - Fall/Winter/Spring State Aid Amount (Position 139-145/178-184/217-223) |

19. Mid-Year Transfer Students -There is no mechanism in place to do a school change for Winter or Spring term transfers. -A data maintenance fix will need to be completed by CSAC. Campus A or B must contact CSAC's Institutional Support Unit to request the transfer. **NOTE:** If CSAC determines the transfer to Campus B will not grant the student an award, the transfer request will not move forward. The student will remain on Campus A roster for the remainder of the year. The campus can apply a payment of Not Enrolled to the remaining term(s).	Term	**Campus A**: Prerequisite Winter Transfer Student: Campus must apply a payment to the Fall term. Spring Transfer Student: Campus must apply a payment to the Fall and/or Winter terms. **Campus B:** Must submit an Enrollment record before the transfer occurs. The Student's Status field must be designated as a Winter or Spring Transfer on the MCS Student Enrollment Data screen. Results: -Display Roster screen: • Campus A: Student will no longer appear • Campus B: Only the term(s) that were transferred appear under the Term Data section (i.e., Winter and Spring or Spring only) - Student Award Summary screen: • Campus A: Student will no longer appear • Campus B: Student will display award only for related term(s) transferred - Student Award Payment History screen: Campus A and B will be able to view all payment and corrections applied for the year. -Student Reconciliation Report: Based on the type of transfer, • Campus A will display the payment(s) applied to Fall and/or Winter terms • Campus B will display the Winter and/or Spring payments (after payment(s) are applied)	**Campus A**: Prerequisite Winter Transfer Student: Campus must apply a payment to the Fall term. Spring Transfer Student: Campus must apply a payment to the Fall and/or Winter terms. **Campus B:** Must submit an Enrollment record before the transfer occurs. The Enrollment file must have the student record designated as a Winter or Spring Transfer. • Student's Status - Field 9 - Position 58 must be designated as a '3' for Winter or '4' for Spring Transfer. Results: • Campus A: Student will no longer appear in the Roster File Report • Campus B: Student will appear in the Roster File Report with amounts related to the term(s) that were transferred: o Field 18 - Adjusted Annual MCS Award Amount (Position 95-99) o Fields 20*/27*/34 – Fall*/Winter*/Spring MCS Award Amount (Position 107-111/146-150/185-189) o Fields 23/30/37 – Fall*/Winter*/Spring Cost of Attendance (Position 118-124/157-163/196-202) o Field 24/31/38 – Fall*/Winter*/Spring Federal Aid Amount (Position 125-131/164-170/203-209) o Field 25/32/39 – Fall*/Winter*/Spring Institutional Aid Amount (Position 132-138/171-177/210-216) o Field 26/33/40 – Fall*/Winter*/Spring State Aid Amount (Position 139-145/178-184/217-223) o Field 52 - Maximum Annual MCS Award Amount (Position 262-266) o Fields 55/56/57 - Maximum Fall*/Winter*/Spring MCS Award Amount (Position 279-283/284-288/289-293) *Amounts will display zero or blank for term(s) not transferred since the term(s) are not awarded under Campus B.

20. Recertifying a Payment	Term	Payments in recertify status can be found under the MCS Display Roster screen:	Payments in recertify status can be found in the MCS Roster Data file:

-Recertify happens when the student record has reconciled payments in place and a correction was applied at the annual or term level which caused the award to be recalculated. This alters the payment that was in place due to the new award amount.
 	
-To recertify means the campus needs to go in and post a payment amount based on the new max term award amount.
 	
NOTE:
You cannot recertify a term and apply a payment or correction to another term for the same student in one transaction. The recertify payment must be completed first. The following processing day, the school can post the payment or correction to the next term.
		• At the search bar, click the "Recertify Only" box for a list of records:
		
		☑ Recertify Only Search
		
		• Under the Term Data section, the term in recertify will hold the following status under the Adj. Reason Code field:
		
		Adj. Reason Code -- Select One --
		[Recertify Payment]
		
		There are two options available to recertify a payment:
		
		• **Option 1 – Using the "Enrollment Status" function:**
		
		Refer to Scenarios 1 through 5 and follow the steps listed for the type of payment that will be applied.
		
		• **Option 2 - Using the "Refund/Adjusted Payment" function:**
		
		Refer to Scenario 6 and follow the steps listed.
		
		<u>Results:</u>
		For results, refer to the related scenario used.
			• Recertify payments are identified as follows:
			
			  o Fall/Winter/Spring Adjustment Reason Code
			  o Field 22/29/36 (Position 117/156/195)
			  o Adj. Reason Code = 6
			
			There are two options available to recertify a payment:
			
			• **Option 1 – Using the "Enrollment Status" function:**
			
			Refer to Scenarios 1 through 5 and follow the steps listed for the type of payment that will be applied.
			
			• **Option 2 - Using the "Refund/Adjusted Payment" function:**
			
			Refer to Scenario 6 and follow the steps listed.
			
			<u>Results:</u>
			For results, refer to the related scenario used.