Manuals+ — User Manuals Simplified.

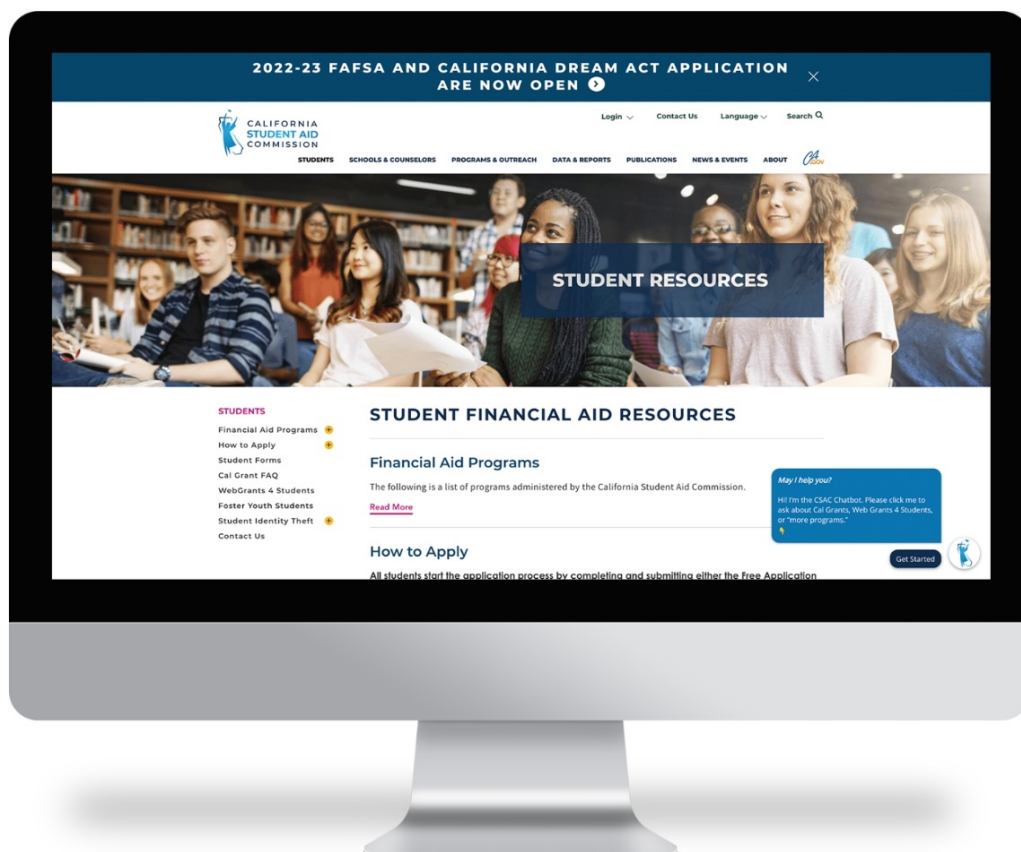# CSAC Student Aid Commission GPA Matching and Editing User Guide

CSAC Student Aid Commission GPA Matching and Editing

Contents

Introduction

For Cal Grant consideration, the California Student Aid Commission (CSAC) requires a certified GPA to be matched to a completed financial aid application. Once a Non-SSN GPA is submitted, CSAC will attempt to match it to a student's Free Application for Federal Student Aid (FAFSA) or California Dream Act Application (CADAA) based on their demographic information such as First and Last Name, Date of Birth, Address, and Email Address. GPA records that are not automatically matched in Web Grants will need to be reviewed and manually matched by school staff to ensure their students are given Cal Grant consideration. If a student's GPA remains unmatched (due to differing demographic information between the GPA submitted by the school and the financial aid application submitted by the student), the student's application will not be processed for Cal Grant consideration. Therefore, school staff must ensure their students' GPAs are matched to the corresponding financial aid applications. This job aid goes over the steps required for school staff to make certain their students' GPAs are correctly matched to the students' financial aid applications.

GPA REPORTS

CSAC provides helpful reports such as the Financial Aid Application Status Report and the Non-SSN GPA Status Report to support schools and school districts. The Financial Aid Application Status Report is an outreach tool to help confirm that students have submitted a FAFSA or CADAA, while the Non-SSN GPA Status Report is a tool used to identify records that require manual GPA Matching.

Financial Aid Application Status Report

The Financial Aid Application Status Report is an outreach tool to help confirm that students have submitted a FAFSA or CADAA.
How to Access the Financial Aid Application Status Report

- Log in to Web Grants
- Click "Data Transfer" under the Cal Grant section on the homepage
- Click "Report Download" on the pop-up menu
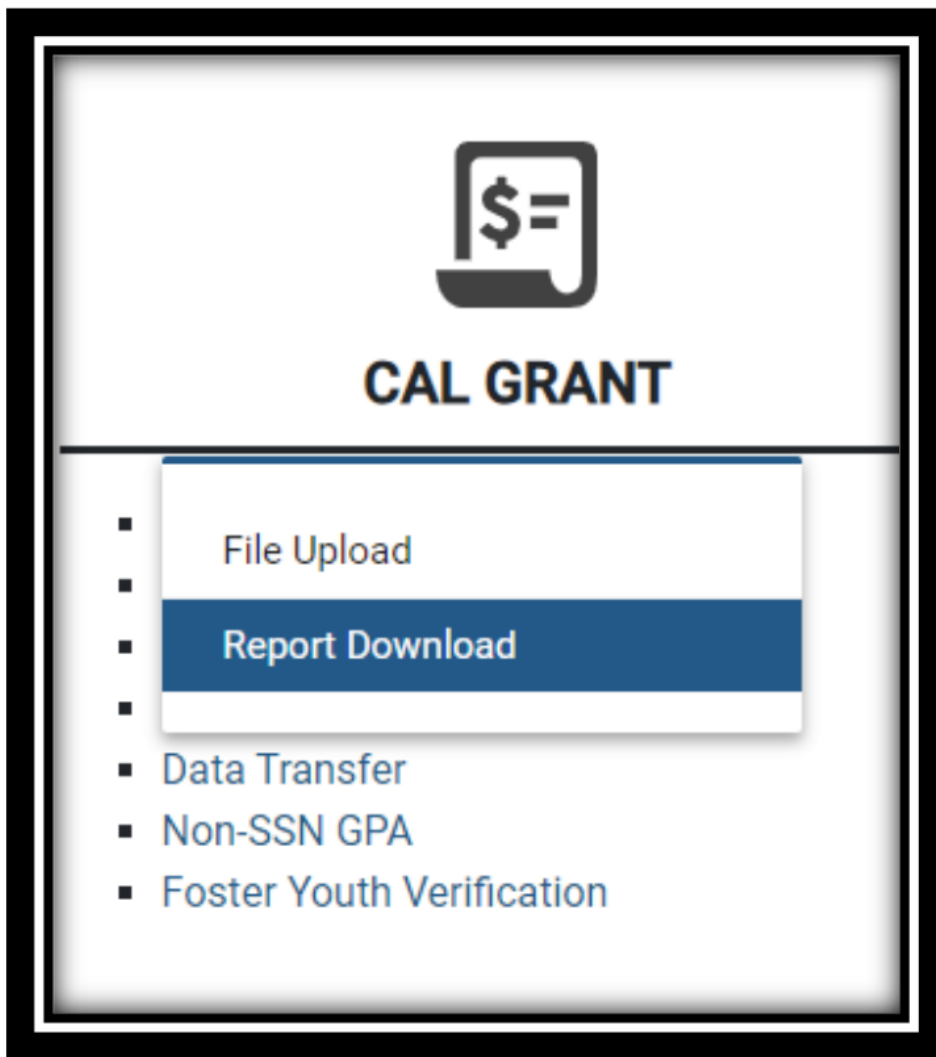
- Click the dropdown menu for "Report" and select "Financial Aid Application Status Report "

- Choose Text or CSV

- Click Download *may take a few minutes to download

- Click the file to open the report

Tip! When using the Financial Aid Application Status Report for student outreach purposes, choose the CSV (Excel) option so you can add filters to the 'Action Needed' column and sort students by the recommended actions.

NON-SSN GPA Status Report

The Non-SSN GPA Status Report is the most comprehensive report required to identify records for GPAs to be matched to their corresponding financial aid applications.

How to Access the Non-SSN GPA Status Report

- Log in to Web Grants
- Click "Data Transfer" under the Cal Grant section on the homepage
- Click "Report Download" on the pop-up menu
- Click the dropdown menu for "Report" and select "Non-SSN GPA Status Report"

- Media Type:
    - **Report:** text file pops up in new window
    - **Data File**: removes headers to import data to Excel and easily filter results
- Select Download File

Schools can use the "Non-SSN GPA Status Report" to see which GPA records need to be matched. Look at the "Matched" column and use the key below to determine the next steps. Once you have identified Unmatched GPAs, you can then manually match the GPAs.

Note: The more fields that appear in the matched field column, the greater the likelihood it is the same student and will result in a successful match. For example, a record that shows LNAME, FNAME, and INIT could be a

different student that has the same name, so the student wouldn't be matched automatically. Your report will not be color-coded like the example below.

MANUALLY MATCH GPA

Step 1: Identify Unmatched GPAs using the Non–SSN GPA Status report which reveals students who have not been matched. For example, in the image below, Shannon Aguilera-Gonzalez shows "FNAME, DOB, CITY" in the matched fields column. This means we have found a financial aid application in our system that matches those three demographic fields from the GPA record and may indicate that a manual match will be required.

Step 2: Match GPA in Web Grants

- Log in to Web Grants
- Click "Non-SSN GPA" under the Cal Grant section on the homepage
- Click Match Non-SSN GPA to Fin App on the pop-up menu (Schools also have the option to use the Match Fin App to Non- SSN GPA) Pro tips for a successful query:
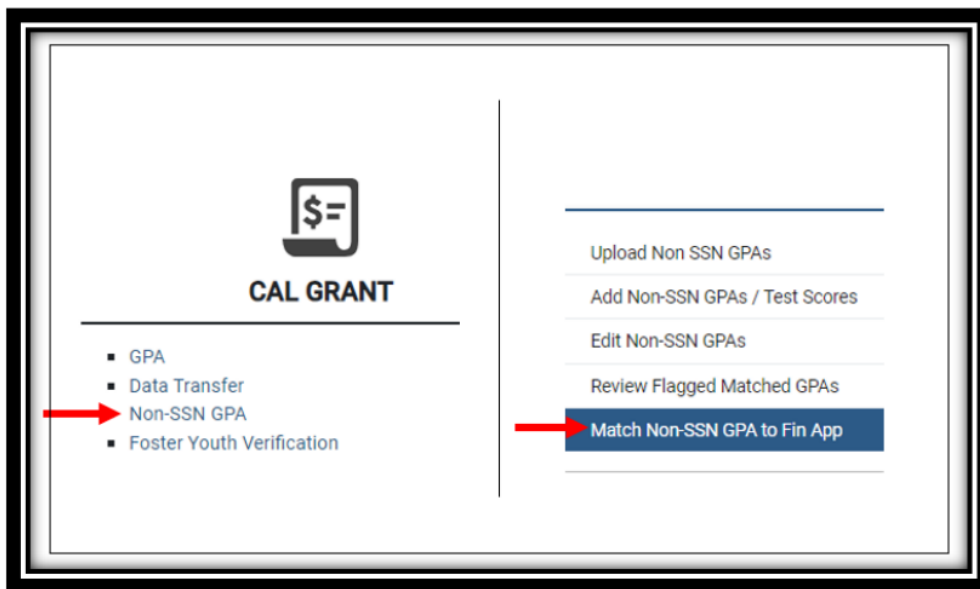
- Leave LAST NAME blank to expand query (use last name if search results indicate there were too many records that matched the search criteria
- Enter the first 3 letters of the student's FIRST NAME as submitted on the GPA record
- Enter the student's DOB as submitted on the GPA record
- Enter your 6-digit school board ID and add two trailing zeroes at the end
- Press "Search" When the student list populates:

- Locate your student from the list and click to open the student record. To select the record to match, the record will turn blue when you place your cursor over it. Records highlighted in green already had a GPA matched to their application and were processed for Cal Grant consideration. Therefore no further GPA can be matched using this screen. You may contact us if you believe an incorrect GPA has been matched to your student and would like assistance correcting the issue.

After opening your student record by double clicking on their name:

- The GPA record that was uploaded by your school/district will appear in the green column on the left
- Any student applications matching your search criteria appear in white columns
- Click 'Match' on your student's record to manually match the GPA. Before submitting changes, confirm that the

application you are matching to belongs to your student, and not another student with similar data; i.e. twins/triplets.

After clicking "Submit Change", your student's record will change to green, indicating a successful match. Use the Non-SSN GPA > Match NON-SSN GPA to Fin App screen in Web Grants to see the change. Now this application is ready to be processed for a High School Entitlement Cal Grant during our next weekly run!

Review Flagged Matched GPAs "Gold Hold Status"

The Review Flagged Matched GPAs screen in Web Grants displays your students who have had their GPA matching attempt flagged for review. Flagged GPAs occur when the information from the Non-SSN GPA record doesn't fully match the information listed on the matched financial aid application. GPA matches flagged for review will prevent a Cal Grant award from processing until verified.

Flagged GPA records are most often found when attempting to match a student's GPA to their financial aid application on the Match Non-SSN GPA to Fin App screen. These flagged records are highlighted in gold. As described above, institutions can verify their school's records and clear the hold in real-time on the Review Flagged Matched GPAs screen in Web Grants.

How to Access the Review Flagged Matched GPAs

- Log in to Web Grants
- Click "Non-SSN GPA" under the Cal Grant section on the homepage
- Click "Review Flagged Matched GPAs" on the pop-up menu
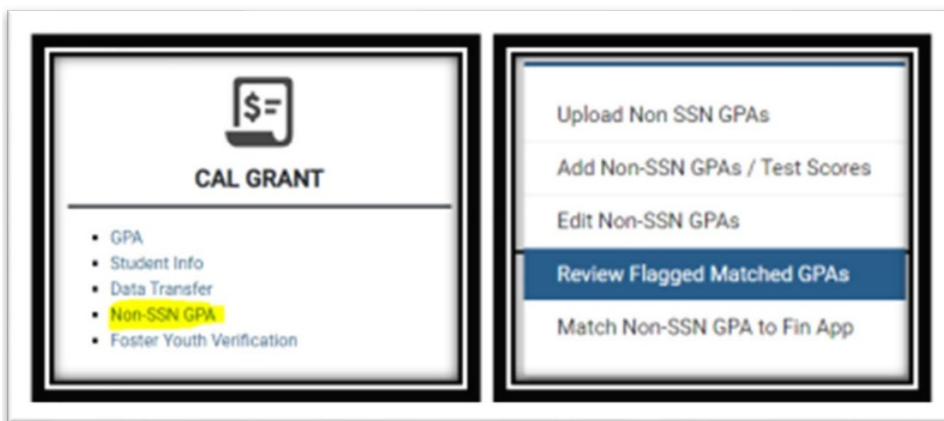
- Search using only the school code or with the first three letters of the first and/or last name of a specific student. Searching with only the school code allows users to find all pending students for their institution.

- For each student, there are different rows of information. The top row information comes from the Non-SSN GPA record submitted by the school. The information in the row(s) below comes from the financial aid application(s) submitted by the student that the GPA can be matched to.
- Determine if the information matches with your student and match or un-match the record accordingly. Select the checkbox for Verify if you confirm the application is the same student as the GPA record or Un-Match if it is not. Then save changes at the bottom of the page. The screen only allows users to save 6 records at a time. If you have more than 6 records, you will need to select 6 records, save them, and then review the others.
- If a record is unmatched, it will enable the GPA record and financial aid application to be matched with other available records. If the record was trying to match to a different student at your institution, you can now try to match the GPA record with the correct student on the Match Non-SSN GPA to Fin App screen in Web Grants.

Error Messages

"NO ISIR DATA FOUND FOR SELECTION CRITERIA"
"NO NON_SSN DATA FOUND FOR SELECTION CRITERIA,"

If error messages appear when attempting to match GPAs, vary/refine your search criteria, or edit the GPA, if applicable. In some instances, students may need to correct their FAFSA or Dream Act Application for matching to occur. If no financial aid application has been completed, have the student complete a financial aid application and retry your search approximately 7-10 days after the financial aid application is submitted.

EDITING A GPA RECORD

Note: Edit screen is only available for part of the year, usually October 1 – April 30. If trying to EDIT a GPA outside of this date range, please contact the School Support Unit.

STEP 1: Confirm what demographic information was used on the financial aid application.

There are a few ways to obtain this information:

- Contact the student and ask them to confirm their name, DOB, and mailing address, exactly, as provided on their financial aid application
- Have the student provide a copy of their "Submission Summary Report". This report is generated about 3-5 days after completing a financial aid application. The student will need to log onto their FAFSA/CADAA portal to obtain a copy of their SAR. The SAR provides basic information about the student's eligibility for financial aid, and lists the demographic information used when the student filed their application (i.e. name, DOB, mailing address)

STEP 2: EDIT the GPA Record

New Functionality for Schools:

- On the Edit Non-SSN GPA screen in Web Grants, institutions can now edit the GPA and High School Graduation Date fields for students whose GPAs have been matched to an application but not yet processed. This allows schools to submit certain GPA corrections in real-time instead of having to email the corrections to **schoolsupport@csac.ca.gov** for processing.
- Additionally, institutions can now match a Non-SSN GPA to a student's application that already has another

GPA matched to it. This will allow an application to have multiple GPAs matched, which can help in scenarios where multiple schools have uploaded GPAs for a single student. CSAC will use the highest GPA on file at the time of award processing to determine program eligibility.

Follow These Steps To Access The Edit Non-SSN GPAs Screen:

- Log in to Web Grants
- Click "Non-SSN GPA" under the Cal Grant section on the homepage
- Click "Edit Non-SSN GPAs" on the pop-up menu
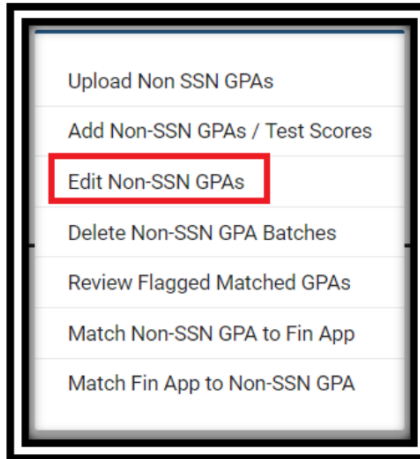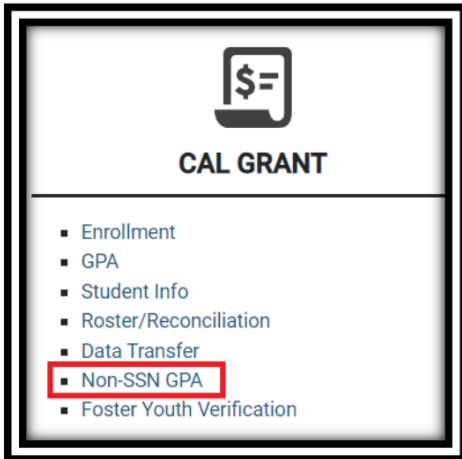
- When the student list loads, you will see records in white, which can be edited, or green, which cannot be edited, as they have already been processed for an award. We have hidden some student information in the screenshot below for security purposes.

- To edit the entries shown in white above, click anywhere on the row. This will load the Edit Record screen, as seen in the image on the right. This is where you can make any necessary corrections. For records where the GPA has been matched to an application, only the 'GPA' and 'Graduation Date' fields can be modified, as shown here.

- Once the updates have been made, you may submit your changes. A confirmation message will appear asking you if you would like to save your changes. Clicking OK will save the changes, and a green success message will be displayed. Your changes have now been saved.
- Proceed to manually match the GPA (See "Manually Matching a GPA Record" section of this guide for instructions)

- Please note that the process for updating a student's record that has not been matched to an application remains unchanged. In that scenario, all fields can still be modified.

Student Information

Last Name*	A▮▮▮	Student's Email	
First Name*	ELHAM	Address*	▮▮▮▮▮▮
Middle Initial			Address 2
Date of Birth*	▮▮▮▮		▮▮▮▮ ▮▮
Gender*	M	Student's Phone	
Graduation Date*	06/2022		

Parent Information

| Father's Last Name | | Parent's Email | |
| Mother's Last Name | | Parent's Phone | |

Other Information

State Student ID*	▮▮▮	School Code* (School Submitting GPA)	▮500
CSAC ID		GPA*	400
School Student ID			(001-400)

COMMON FAQs

What is the source of the enrollment data?

As communicated in GSA 2023-27, the Financial Aid Application Status Report uses information from the California Department of Education's (CDE) CALPADS system and will no longer generate for schools that we have not received CDE enrollment data for.

How often does CDE send data to CSAC?

We receive updated information from CDE on a weekly basis. Once received, the updates should be reflected in Web Grants within 24-48 hours.

How can I verify that our school's GPAs have been submitted?

You can use the Financial Aid Application Status Report if CSAC has received your school's enrollment data from CDE. In addition to this report, you may also use the GPA Summary Report, the Non-SSN GPA Status Report, and the Student Summary Report.

Why do I see duplicate entries for my student(s)?

You may see duplicate rows for the same student if another school uploaded a GPA for that student. In this scenario, the GPA field uploaded by the other school will have three asterisks instead of a GPA value (***). If you are seeing a lot of students with multiple rows on the report that display GPA values, it is possible we received a duplicate GPA file upload from your school. In that scenario, please contact School Support at 1-**888-294-0153** for assistance in deleting the duplicate GPA file upload.

Why can't I see our Financial Aid Application Status Report for a prior year?

The Financial Aid Application Status Report is designed to assist with the FAFSA and CADAA submission confirmation requirements for the active financial aid application year.

Why should a school "match" their students' GPA records to financial aid applications?

For a student to be considered for a Cal Grant award, CSAC requires a student's GPA to be "matched" to a financial aid application. Submitting a student's GPA is only part of the process. Students also need to ensure they complete their financial aid applications; and schools must ensure their students' GPA records are matched to their student's financial aid applications. Schools can check to see if their students' GPAs have matched to a financial aid application by reviewing the "Non-SSN GPA Status Report."

Another reason that schools should match their students' GPAs to financial aid applications is because matched GPAs are counted in the Race to Submit Campaign. Schools and districts have a vested interest in increasing this number and monitor this data closely.

What data elements does CSAC use to match GPA records to financial aid applications?

High Schools use the Non-SSN method to upload GPAs, which does not require the use of a Social Security number (many high schools don't even collect SSN data). Therefore, CSAC uses various demographic data elements that are provided on the GPA upload, namely the student's name, DOB and mailing address to match a GPA record to a financial aid application. Schools should ensure the demographic information for their students is up to date prior to uploading GPAs. Schools are encouraged to create a process to collect updated demographic information for their students. CSAC has a GPA Demographic Confirmation template that schools can use in this process.

When will a GPA record automatically be matched to a financial aid application?

Web Grants automatically matches a GPA record to a financial aid application when the demographic information on both the GPA record and financial aid application match exactly.

Why would a GPA record not match to a financial aid application?

GPA records remain unmatched when the demographic information (i.e. name, DOB or mailing address) on the GPA record (as provided by the school) does not match the demographic information provided on the financial aid application by students.

Will "matching" more GPA records improve the numbers displayed on the Race To Submit Dashboard?

Yes. If your public high school or charter participates in the "Race To Submit" campaign, it is important to note that the winners of the Race To Submit campaign are chosen based on the % of matched GPA records.

GPA matching increases the numbers under the gauge titled, "Completed Applications & Cal Grant Awards." This portion of the dashboard tallies the number of applications with matched GPAs. The result? Students with matched GPAs are then processed for Cal Grant consideration.

Completed: with GPA 166,953   Awarded: 86,288

FAFSA/CA Dream Act + GPA

166,953

High School Seniors

When can schools EDIT and MATCH their student's unmatched GPA records?
Beginning in October, schools can begin to EDIT and MATCH any unmatched GPA records as identified on the "Non-SSN GPA Status" report. The functionality to EDIT a GPA record will remain available to schools until April 30. GPA MATCHING will remain available until October of the following year.

What do either of these messages mean when trying to match a student's GPA record?

"NO NON_SSN DATA FOUND FOR SELECTION CRITERIA"
"NO ISIR DATA FOUND FOR SELECTION CRITERIA"

This message is displayed when the search criteria being used to match a GPA does not match the information on any financial aid applications we have on file. Follow the instructions under error message for possible solutions. In most cases however, this message likely means your student has not completed a financial aid application. Follow up with your student or assist them in completing their financial aid application. Review the Non-SSN GPA Status report about 7-10 days after submission of the financial aid application to determine if you will need to manually match the GPA.

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STUDENT AID
COMMISSION

Documents / Resources

CSAC Student Aid Commission GPA Matching and Editing [pdf] User Guide
Student Aid Commission GPA Matching and Editing, Aid Commission GPA Matching and Editing, Commission GPA Matching and Editing, GPA Matching and Editing, Matching and Editing, Editing

References

- *Cław* **www.ca.gov | California State Portal**
- **User Manual**