

State Grants Update

July 31, 2025

Traci Mitchell, College Foundation, Inc.

Kevin Lineberry, NC State Education Assistance Authority

Madison Hughes, College Foundation, Inc.

****All student information contained throughout this presentation is sanitized; there is real student information in this presentation.***



Outline

- Summer School Grants- Withdrawals
- Formulas/Payment Schedules
- Pell LEU close and exceeded limit file upload
- Partial credit hours proration for CCs
- Credit hours proration for private colleges
- Frequently Asked Questions
- Status of State Grant Interfaces, CC and UNC
- Status of State Grants System back-end rewrite



State Grants Portal and Processing

Summer School State Grants

- For 2024-25, a summer term of state grants is available for Next NC and NBS.
- Summer was awarded as ONE term on the State Grants Portal
- Summer is a trailer
- The last CFI disbursement for Summer was July 16, 2025, with last certification date July 15, 2025
- For private colleges, if your summer term is at a reduced cost, mark the Summer grant as low-cost.



Summer State Grants – Withdrawals/Drops

If a student withdraws or drops hours in Summer 1, after census and earning 100% of their state grant, can the hours at Summer 1 census be counted along with Summer 2 hours to determine overall summer eligibility?

A: Yes, if a student earned or would have earned 100% of their state aid during summer term 1 based on census and return of funds policies, those hours count along with summer 2 term hours to determine overall summer eligibility for state grant funds.



Summer State Grants – Withdrawals/Drops

Q: If a school treats summer as two terms, how do we define full-time for the summer grant? What if a student who would be full time based on summer session 1 plus summer session 2 drops or withdraws from a course before summer session 2 census?

A: If you certify the full-time hours up front, during summer session 1, and the student does not stay enrolled in the expected number of hours, enrolled hours should be adjusted down and funds returned. One way to handle this is not certify any hours until the student reaches at least a half-time status. So, if a student is not enrolled at least half time in session 1, don't certify until at least half-time status is reached in session 2.



State Grants Portal and Processing

State Grants Formulas-Next NC Scholarship

Next NC for UNC's Formula

AGI Limit: \$80,000

SAI Limit: 7,500

Guarantee: \$5,000

Minimum Annual Award: \$400

Award Determination Formula/Calculation:

Guarantee + Supplement – Pell

If Pell LEU > 500: Guarantee - Pell

Maximum Supplements:

Tuition Category	Institutions	Maximum Supplement
1	NCSU, UNC-CH, UNC-SA	\$6,345
2	Appalachian State Univ, ECU, UNC-G, UNC-C, UNC-W, UNC-A	\$5,420
3	NC A&T, NCCU, WSSU	\$4,840
4a	WCU	\$3,300
4b	UNC-P, Fayetteville State, ECSU	\$2,775

Supplement Calculation:

SAI	Supplement
-1,500 - 0	Maximum Supplement
1 - 1,450	Max Supplement - (1.5 * SAI)
1,451 - 7,500	Max Supplement - (2,175-(SAI-1,450))



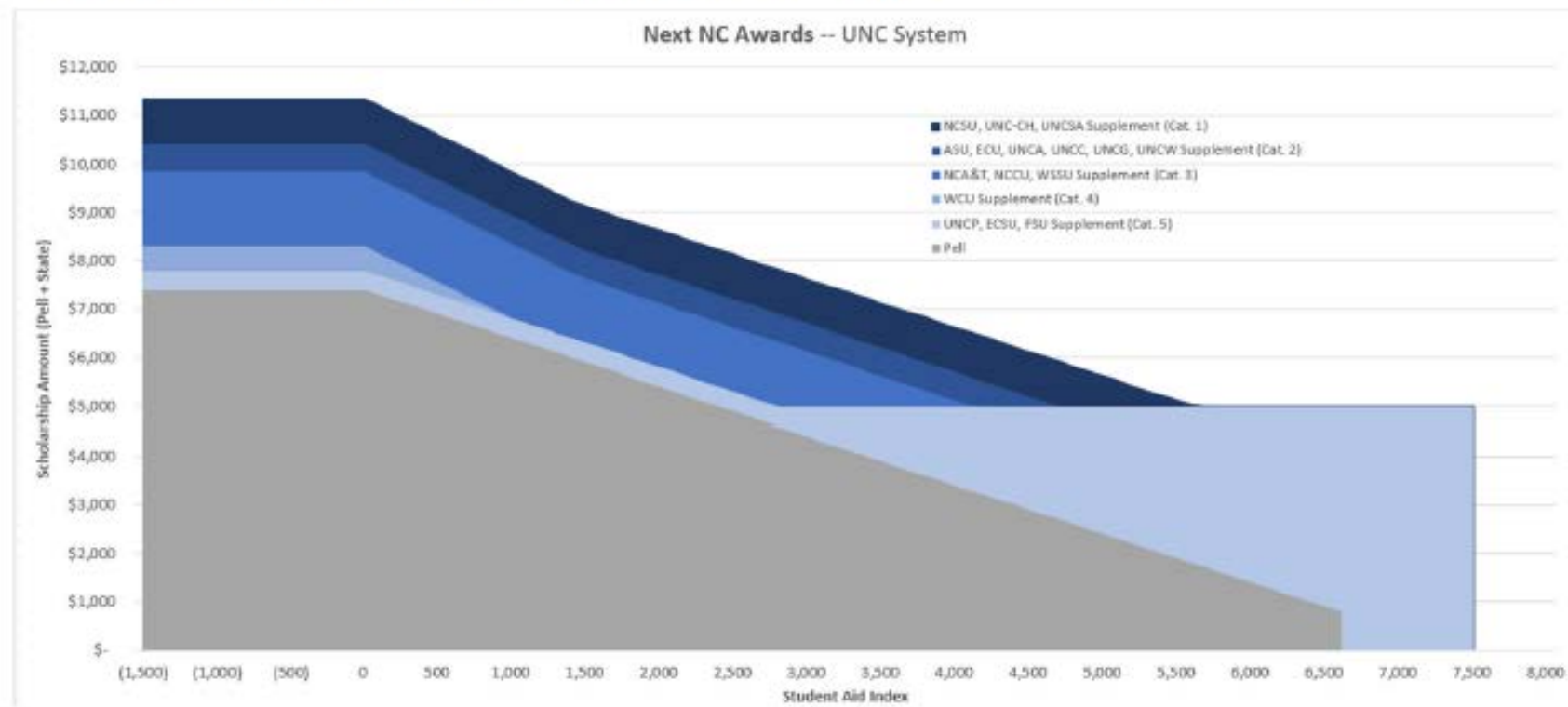
State Grants Portal and Processing

State Grants Formulas-Next NC Scholarship

Next NC Scholarship (UNC)

Pell + State Aid

Visual Representation of Next NC Scholarship (State + Pell):



Next NC for Community Colleges Formula

AGI Limit: \$80,000

SAI Limit: 7,500

Guarantee: \$3,000

Maximum Supplement: \$2,000

Minimum Annual Award: \$200

Award Determination Formula/Calculation:

SAI	Next NC Scholarship-CC
-1500-0	\$200
1 - 399	\$300
400 - 2,795	\$400
2,796 - 7,500	Guarantee + Supplement - Pell

Supplement Calculation:

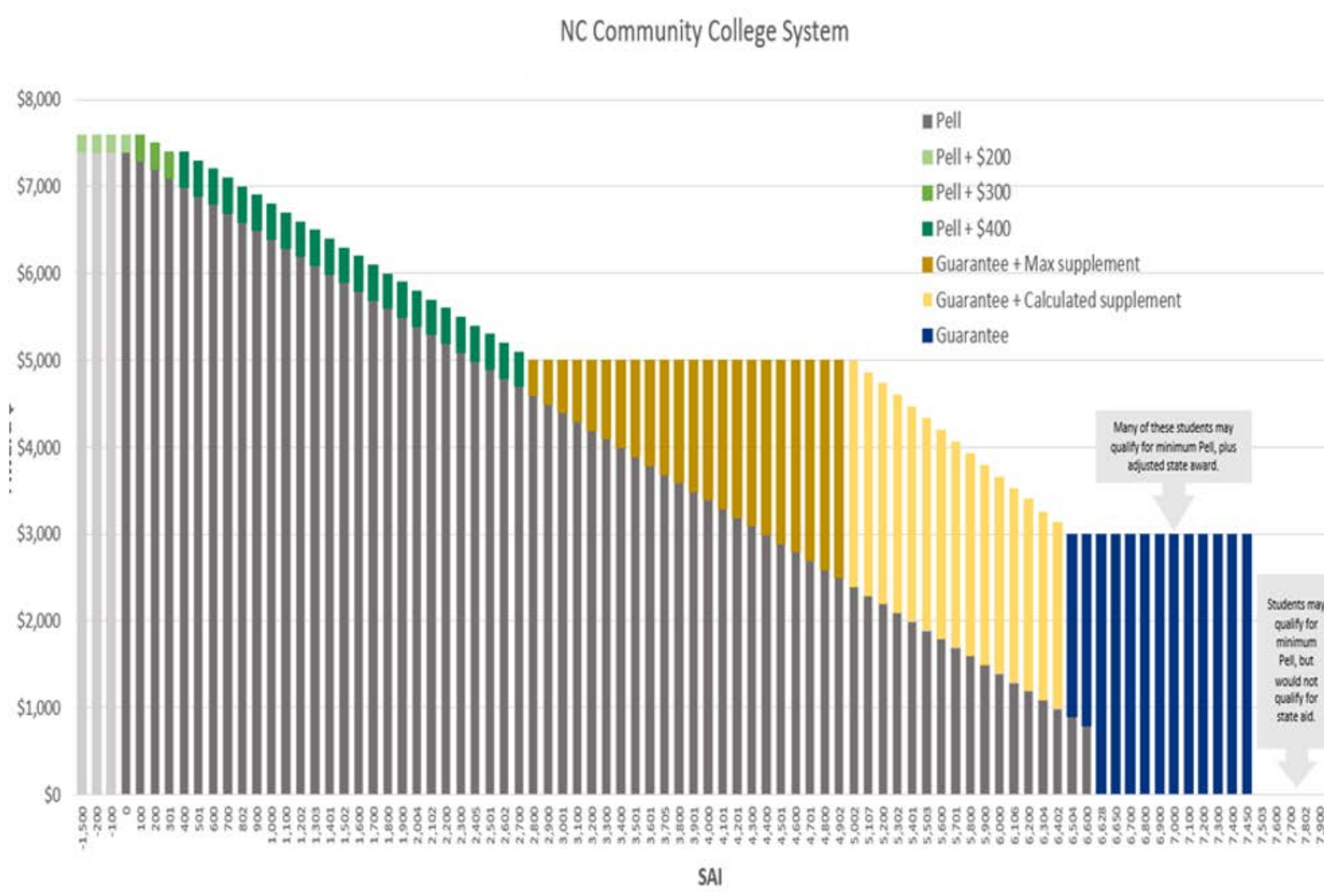
SAI	Supplement
2,796 - 4,999	Maximum Supplement
5,000 - 6,500	$\$2,000 - 2,000 * ((SAI - 5,000) / 1,500)$
6,501 - 7,500	No Supplement

If Pell LEU > 500: Guarantee - Pell



State Grants Portal and Processing

State Grants Formulas-Next NC Scholarship



Next NC Scholarship (CC)

Pell + State Aid



State Grants Portal and Processing

State Grants Formulas- Need Based Scholarship for Private Institutions (NBS) NEW for 25-26

Eligibility Parameters:

AGI Limit: \$160,000

SAI Limit: 15,000

Max Supplement: \$10,000

Base Amount: \$5,000

Max NBS + Pell: \$15,000

Minimum Annual Award: \$400

Enrollment Proration: Same as Pell. Must be enrolled at least ½ time.

Annual Award Calculation:

SAI	NBS Calculation
Pell LEU > 500	Greater of (Base Amount – Pell) OR \$400 Minimum Annual Award
-1,500-1,000	\$15,000 - Pell
1,001-12,500	Base Amount + Calculated Supplement - Pell $\$5,000 + [\$10,000 - (\$10,000 * ((SAI - 1,001) / 11,499))] - Pell$
12,501-15,000	\$5,000 - Pell

If Pell LEU > 500: Guarantee - Pell

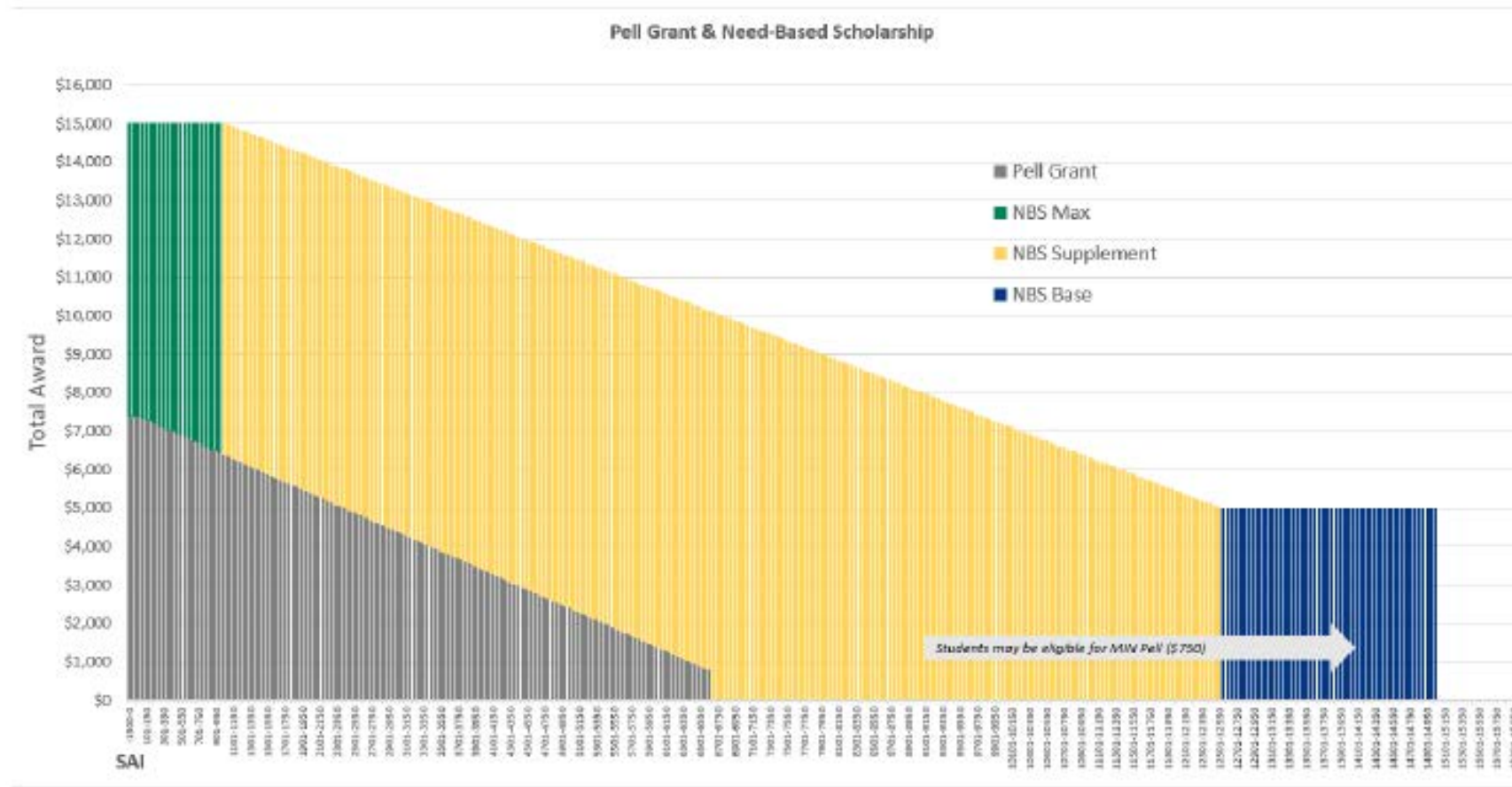
Prorates like Pell starting 25-26



State Grants Portal and Processing

State Grants Formulas- Need Based Scholarship for Private Institutions (NBS) NEW for 25-26

Visual Representation of NBS Formula:



2025-2026 Changes for State Grants

State Grants formulas- Students over 500.00 Pell LEU

- For 24-25 for Next NC, students over 500 LEU received the guarantee of \$3K for CCs and \$5K for UNC.
- For 25-26, the formula has been refined to calculate the exact annual Pell for LEU>500. This applies to Next NC and NBS.
- Term amount of Grant will be:
 - $(\$3k\text{-Annual Pell})/2$ for CCs
 - $(\$5K\text{-Annual Pell})/2$ for UNC and Private Colleges (regular students)



State Grants Portal and Processing

2025-2026 Changes for State Grants

File Upload for Pell LEU ≥ 400.00

- CFI has access only to the Pell LEU on the ISIR, which may be inaccurate/out of date
- Pell amount is part of the formula for NBS and Next NC, so calculating Pell correctly is imperative to students receiving the Guarantee(Next NC) or Base (NBS) Amount
- CFI will rely on colleges to provide an updated Pell LEU for students with LEU > 400 at the **start** of the academic year. Most colleges are using the LEU from COD.



2025-2026 Changes for State Grants

File Upload for Pell LEU ≥ 400.00

Why is the file upload needed students with LEU >400 and <500 and not just students >500 ?

- At the end of 24-25, updated ISIRS came in, bumping some students over 500 LEU and causing their grants to increase to \$3K or \$5K, even though the students were under 500 during the AY and received full Pell.
- Since CFI will use the college provided LEU, if there is one, having an upload of students over 400 LEU will ensure that LEU is used and the student is calculated by the standard formula.



State Grants Portal and Processing

2025-2026 Changes for State Grants

File Upload for Pell LEU ≥ 400.00

File will be a .csv, uploaded to the State Grants Portal at the start of the AY, or may be manually entered/updated on the Portal.

Pell LEU file layout:

LEU > 400 File Upload					
Field	Length	Dec	Type	Pos	Description
SSN	9		A	1	SSN
ACYR	4	0	S	10	ACADEMIC YEAR
SCH CODE	6		A	14	SCHOOL CODE
SCH BRANCH	2		A	20	SCHOOL BRANCH
LEU	7	3	N	22	Pell LEU, Decimal included
STUID (optional)	11		A	29	School Student ID, not required

Example of file, school code 002906-00
Column F, Student ID, is optional

	A	B	C	D	E	F
1	123456789	2026	2906	0	525.675	445767
2	32165498	2026	2906	0	425.478	246471
3	999889999	2026	2906	0	585.275	456174

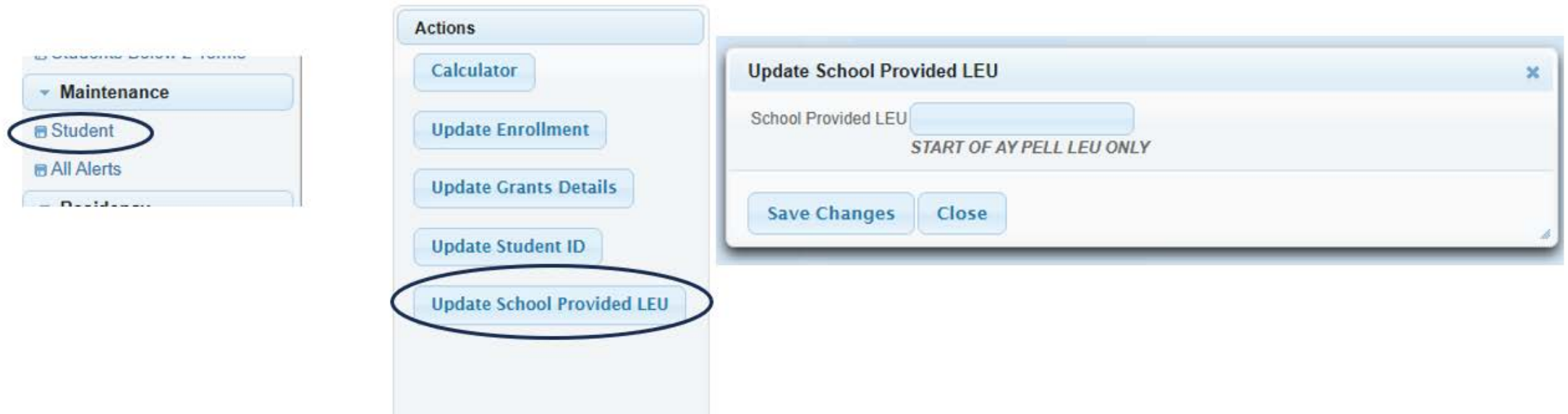
Timing is crucial: Uploaded Pell LEU must reflect all Pell received to date, prior to Fall.



State Grants Portal and Processing

2025-2026 Changes for State Grants

Pell LEU entry on State Grants Portal
Maintenance, Student screen:



2025-2026 Changes for State Grants

Partial Credit Hours proration for CCs

- In 24-25, partial credit hours, such as 8.5 or 10.25, were truncated if received. Such students were awarded in the portal at 8 and 10 hours, respectively.
- Starting in 25-26, partial credit hours will be prorated exactly.
- NOTE: Partial credit hours proration programming in the State Grants Portal will not be completed until Aug-Sept. CFI will round down to the nearest whole hour. Students with additional partial credits can be updated once the proration is supported by our system.



2025-2026 Changes for State Grants

Credit Hours Proration for Private Colleges

- In 24-25, NBS was prorated by enrollment status. Although the hours enrolled were certified, the proration was still .75 for $\frac{3}{4}$ time and 0.5 for half time.
- Starting in 25-26, NBS is prorated by the hour, like Pell.



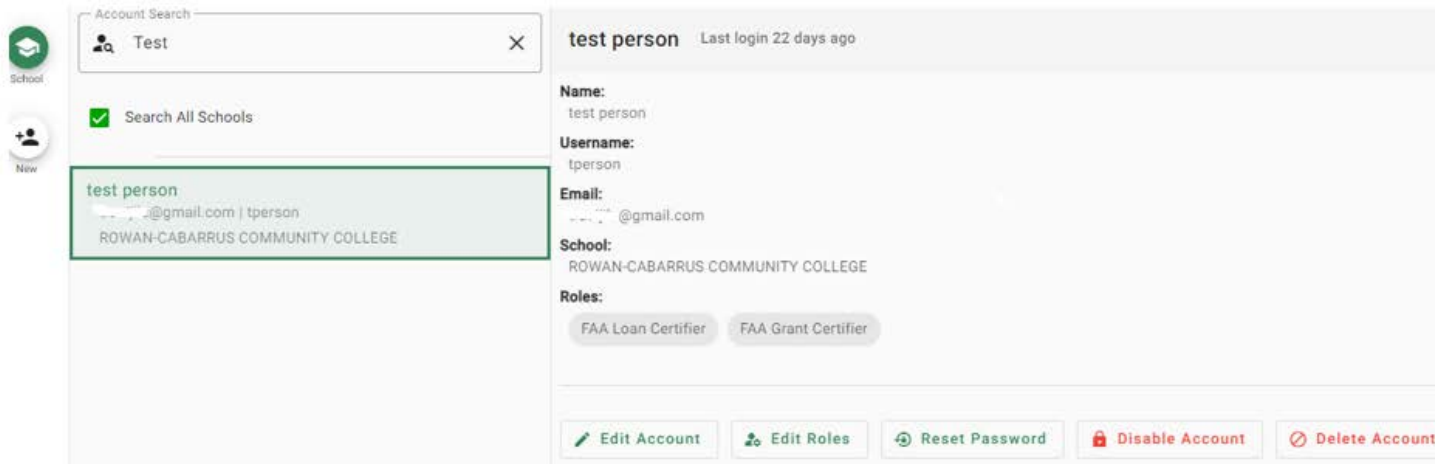
State Grants Portal and Processing

General Frequently Asked Questions and Answers

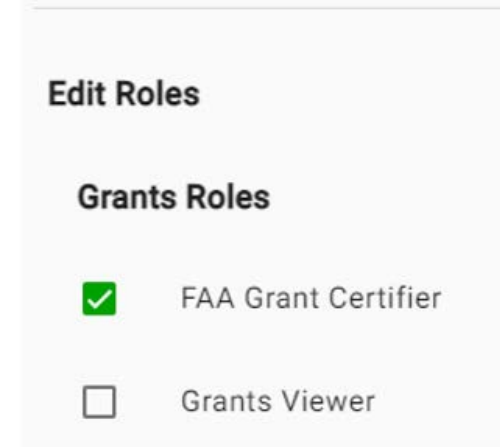
Q: Why am I unable to access some options/functions in the menu on the grants portal?

A: If unrelated to the recent rewrite, your administrator can check the roles assigned to your Username in the User Admin Portal: <https://schooladmin.cfnc.org/schoolloans/login>

It is likely you have been assigned conflicting roles. Users should only have ONE Grants Role, Certifier or Viewer. If you are assigned both, the lesser role (Viewer) will override the Certifier role, which has more access. Remove the Viewer role to fix this issue.



The screenshot shows the 'Account Search' interface. On the left, a sidebar has 'School' and 'New' icons. The main area has a search bar with 'Test' and a 'Search All Schools' checkbox. Below the search bar, a list of results shows 'test person' with email '...@gmail.com | tperson' and school 'ROWAN-CABARRUS COMMUNITY COLLEGE'. To the right, a detailed view for 'test person' shows 'Last login 22 days ago', 'Name: test person', 'Username: tperson', 'Email: ...@gmail.com', and 'School: ROWAN-CABARRUS COMMUNITY COLLEGE'. Under 'Roles', 'FAA Loan Certifier' and 'FAA Grant Certifier' are listed. At the bottom, there are buttons for 'Edit Account', 'Edit Roles', 'Reset Password', 'Disable Account', and 'Delete Account'.



The screenshot shows the 'Edit Roles' section. It has a title 'Edit Roles' and a sub-section 'Grants Roles'. Under 'Grants Roles', there are two options: 'FAA Grant Certifier' with a checked checkbox, and 'Grants Viewer' with an unchecked checkbox.




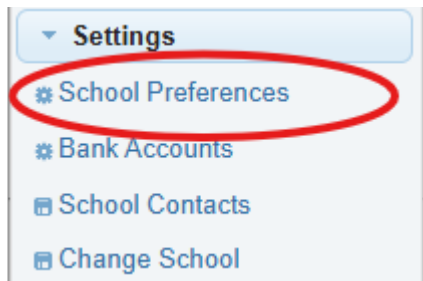
State Grants Portal and Processing

General Frequently Asked Questions and Answers

Q: Where are my disbursements?

A: Make sure the earliest first disbursement date is filled in and has passed. Certifications completed by close of business Tuesday on or after the earliest first disbursement date will disburse that week. The earliest allowed disbursement for Fall is August 1. The earliest allowed disbursement for Spring is December 1.

- Update your disbursement dates via School Preferences on the State Grants Portal.

A screenshot of a web form titled 'Academic Year Specific'. It contains several dropdown menus: 'Academic Year' set to '2025-2026', 'Download Layout' set to 'Ellucian CC', and 'Download Type' set to 'Flat File'. There is a checkbox for 'Use sFTP File Transfer' which is checked. Below these is a table with two columns: 'Term' and 'Earliest Disbursement'. The table has two rows: 'FALL' with a date of '12/01/2025' and 'SPRG' with a date of '04/01/2026'. Red arrows point to the date input fields. At the bottom of the form is a 'Save Preferences' button.

Term	Earliest Disbursement
FALL	12/01/2025
SPRG	04/01/2026



General Frequently Asked Questions and Answers

Q: Why is my student not eligible/funded?

A: There are many reasons a student may not be eligible/funded. Check the SAI and AGI to be sure they are within the limits. Verify the enrollment status is correct (not certified for less than half time. Check for issues with the aggregate term limit, student default or overpayment, residency discrepancies, a previous bachelor's degree, etc.

Use the Maintenance, Student screen to look up this information.



State Grants Portal and Processing

General Frequently Asked Questions and Answers

Use the Maintenance, Student to check for ineligibility reasons

Summary for 2025 - 2026

Name:

Student ID:

Current CPS: 2

Residency Discrepancy: N

RDS Effective Date: 02/24/2025

Total Grants: \$0.00

Disbursed Amount: \$0.00

Adjustments: \$0.00

Undisbursed Amount: \$0.00

Pending Adjustments: \$0.00

Actions

Calculator

Update Enrollment

Update Grants Details

Update Student ID

Update School Provided LE

Pull up the student and click on the Rejection Reasons tab.

Grants	Enrollment	Transactions	Tracking	Rejection Reasons
Academic Year	Grant	Enrollment Period	CPS Number	Reason
2025 - 2026	CC	FALL	1	PREVIOUS BACHELOR DEGREE
2025 - 2026	CC	FALL	1	INELIGIBLE GRADE LEVEL
2025 - 2026	CC	FALL	1	INCOME TOO HIGH
2025 - 2026	CC	FALL	1	SAI too High
2025 - 2026	CC	SPRG	1	PREVIOUS BACHELOR DEGREE
2025 - 2026	CC	SPRG	1	INELIGIBLE GRADE LEVEL
2025 - 2026	CC	SPRG	1	INCOME TOO HIGH
2025 - 2026	CC	SPRG	1	SAI too High
2025 - 2026	CC	FALL	2	INCOME TOO HIGH
2025 - 2026	CC	FALL	2	SAI too High
2025 - 2026	CC	SPRG	2	INCOME TOO HIGH
2025 - 2026	CC	SPRG	2	SAI too High



State Grants Portal and Processing

General Frequently Asked Questions and Answers

Use the Maintenance, Student to check RDS issues.

Summary for 2025 - 2026

Name:

Student ID:

Current CPS:

Residency Discrepancy:

RDS Effective Date:

1

Y

10/22/2024

Total Grants:

Disbursed Amount:

Adjustments:

Undisbursed Amount:

Pending Adjustments:

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

Actions

Calculator

Update Enrollment

Update Grants Details

Update Student ID

Update School Provided LEU

Grants Enrollment Transactions Tracking Rejection Reasons													
Grant Type	Academic Year	Enrollment Period	Funded	Hold	Max Amount	Actual Amount	Cap Amount	Eligible (per School)	Certification Date	Hours Used	RDS	RDS Val	CGF
UNC	2025 - 2026	FALL	Y	N	\$0.00	\$0.00	\$0.00		None	0	N	Y	N
UNC	2025 - 2026	SPRG	Y	N	\$0.00	\$0.00	\$0.00		None	0	N	Y	N



State Grants Portal and Processing

General Frequently Asked Questions and Answers

Use the Maintenance, Student to check terms/hours remaining.

Grants	Enrollment	Transactions	Tracking	Rejection Reasons									
Grant Type	Academic Year	Enrollment Period	Funded	Hold	Max Amount	Actual Amount	Cap Amount	Eligible (per School)	Certification Date	Hours Used	RDS	RDS Val	CGF
UNC	2025 - 2026	FALL	Y	N	\$379.00	\$0.00	\$0.00		None	0	Y	Y	Y
UNC	2025 - 2026	SPRG	Y	N	\$0.00	\$0.00	\$0.00		None	0	Y	Y	Y

Student is eligible only for a partial fall term.

Click the Tracking tab.

State Level Terms					
2019 - 2020	FALL	CENTRAL PIEDMONT COMMUNITY COLLEGE		12	12
2019 - 2020	SPRG	CENTRAL PIEDMONT COMMUNITY COLLEGE		12	12
2020 - 2021	FALL	UNC CHARLOTTE		9	6
2021 - 2022	FALL	UNC CHARLOTTE		12	12
2021 - 2022	SPRG	UNC CHARLOTTE		12	12
2022 - 2023	FALL	UNC CHARLOTTE		12	12
2022 - 2023	SPRG	UNC CHARLOTTE		6	6
2023 - 2024	FALL	UNC CHARLOTTE		0	6
2023 - 2024	SPRG	UNC CHARLOTTE		9	9
2024 - 2025	FALL	UNC CHARLOTTE		12	12
2024 - 2025	SPRG	UNC CHARLOTTE		18	12
2024 - 2025	SUM	UNC CHARLOTTE		6	6
Total Hours Received - State Level Terms					117
Hours Remaining - State Level Terms					3



Status of State Grant Interfaces for CCs and UNC

CCs:

Colleague patch is available now to colleges. There is a new file layout to accommodate partial credit hours. And RECON (combined disbursements) should now be functional!

Be sure to contact CFI when you load this patch so we can make sure you are on the correct file setting. Your file layout should be set to Ellucian-CC

Academic Year Specific
Academic Year: 2025-2026
Download Layout: Ellucian CC
Download Type: Flat File
Use sFTP File Transfer: Yes

Term	Earliest Disbursement
FALL	12/01/2025
SPRG	04/01/2026

[Save Preferences](#)



State Grants Portal and Processing

Status of State Grant Interfaces

UNCs:

The update for the state grant interface is now available to colleges. Once this is installed, you can upload and download flat files via FTP.

You should be set to Ellucian 25 once you have installed the update.

Academic Year Specific
Academic Year: 2025-2026
Download Layout: Ellucian 25
Download Type: Flat File
Use sFTP File Transfer: Yes

Term	Earliest Disbursement
FALL	09/09/2025
SPRG	02/03/2026

Save Preferences



State Grants Portal and Processing

For private colleges and UNC's not using Banner

You need to use the Ellucian 25 file layout if you are uploading certifications. This layout has a place for enrolled hours.

All colleges are certifying by enrolled hours for 25-26.

Academic Year Specific

Academic Year: 2025-2026

Download Layout: Ellucian 25

Download Type: Flat File

Use sFTP File Transfer: Yes

Term	Earliest Disbursement
FALL	09/09/2025
SPRG	02/03/2026

Save Preferences



Status of State Grant Portal back-end rewrite

- The rewrite has been completed, and the new grants system has been implemented.
- Some login issues were encountered initially but seem to be resolved at this time.
- File upload processing is currently on a once per hour schedule at one minute before the hour, every hour. This interval will be shortened in the future.
- The Pell LEU file upload is processing very slowly. We are working to speed this up.
- As we move into the busiest time for the State Grants Portal, please let us know of
- any issues or anomalies that you encounter.



Updates

A rounding issue for certification prorations for 8, 9, and 10 hours is being corrected.

- Term awards should be rounded to the nearest whole dollar but are currently being rounded up.
- Once this fix is in place, affected certifications will be recalculated and the award amount updated on the State Grants Portal.

An update will be made to the formula for low-cost NBS students with LEU over 500.

- Currently, the formula is \$2,200-Pell
- Since SAI/Pell are not part of the low-cost formula in general, we will NOT subtract Pell for low-cost students with LEU>500
- Once this change is in place, any awards already certified as low-cost, LEU>500, will be recalculated.



Questions and Discussion



State Grants Portal and Processing

CFI State Grants Contacts

Traci Mitchell	Traci.Mitchell@cfi.org	919-835-2364
----------------	--	--------------

Madison Hughes	Madison.Hughes@cfi.org	919-835-2563
----------------	--	--------------

SEAA Contact:

Kevin Lineberry	klineberry@ncseaa.edu	919-248-4679
-----------------	--	--------------

