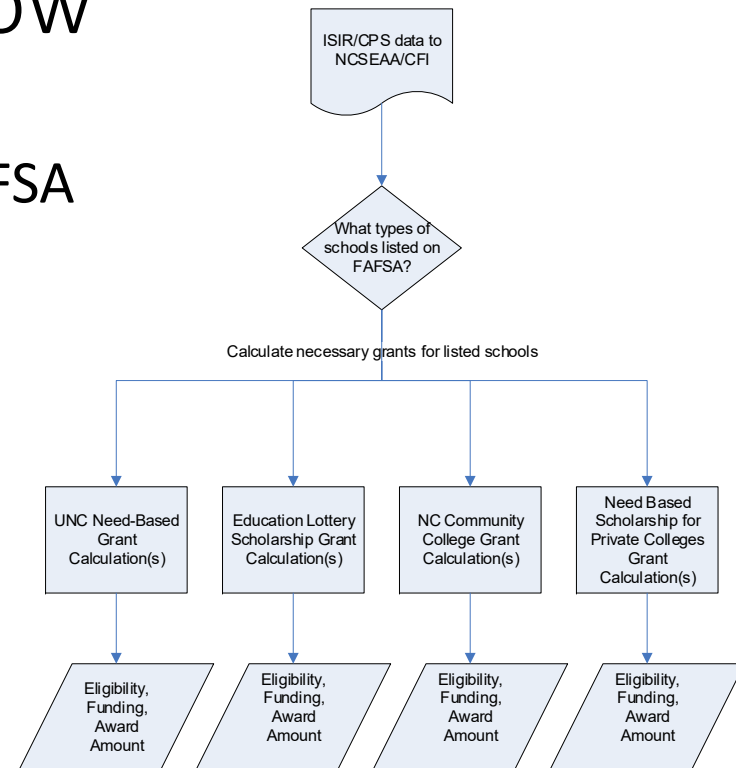

State Grants Portal and Processing

How it Works and FAQs

State Grants High Level Flow

- Students and Parents complete the FAFSA
- CFI calculates grant eligibility funding:
 - for each student
 - for each grant type
 - for each set of data
 - for each selected school



State Grants High Level Flow

- CFI receives and processes CPS data nightly
- Rejected records are NOT processed in to state grants
- RDS determinations are pulled in to the state grants system in real time and are included in eligibility processing
- FASFA reported state of residence included in eligibility processing
- State grants number of terms limit included in eligibility processing
- Defaults and Overpayments and other fields from FAFSA/CPS are included in eligibility processing

State Grants High Level Flow

- Grant awards are calculated and available on the State Grants Portal
- Eligible awards are “funded” based on budget for each program. All programs are “over committed” because not all calculated awards will be taken
- “Funded” on the portal means funds are reserved for that award
- CFI and NCSEAA monitor funding levels as colleges certify
- Sometimes not all eligible awards can be funded
- Funding is first come first serve by FAFSA received date

State Grants High Level Flow

- Colleges certify state grants by entering an enrollment status per term
- Certifications can be done by file upload or by manually entering on State Grants Portal
- CPS/ISIR number on Portal must match what college is using for other aid
- Grants are disbursed weekly – rosters generated on Wednesday, funds delivered on Friday – on or after term “earliest first disbursement date” provided by college
- Reconciliation throughout semester- Withdrawal Return of funds and changes in enrollment status along with EFC changes result in funds returned to CFI

State Grants FAQs

- Why isn't this student packaging/funded/eligible?
- Where are my disbursements?
- What is going on with my grant returns/reconciliation?
- I entered a withdrawal calculation incorrectly, or something changed. How do I fix it?
- A student dropped some classes, but didn't withdraw. How do I adjust the grant?
- How do I add new contact information?
- Why am I not receiving notifications?
- How do I set up new users/reset passwords?

State Grants FAQs

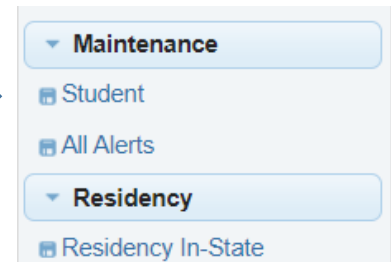
Why isn't this student packaging/funded/eligible?

- The student does not have an eligible EFC or is not financially eligible
- The student EFC does not support the reported enrollment status
- The student has a default or overpayment
- The student has used all their terms available
- The student has a residency discrepancy or an out of state determination from RDS
- Funding is exhausted for that program

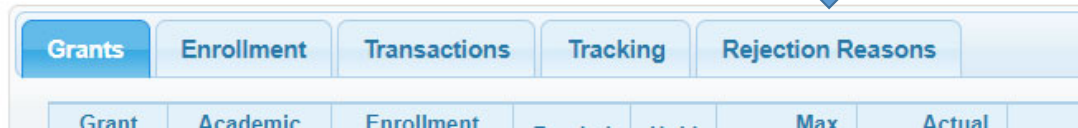
State Grants FAQs

Why isn't this student packaging/funded/eligible?

- Maintenance, Student
- Rejection Reasons tab



A navigation menu with two main sections: 'Maintenance' and 'Residency'. Under 'Maintenance', there are links for 'Student' and 'All Alerts'. Under 'Residency', there is a link for 'Residency In-State'. A blue arrow points from the text 'Maintenance, Student' in the list to the 'Student' link.



A set of navigation tabs: 'Grants', 'Enrollment', 'Transactions', 'Tracking', and 'Rejection Reasons'. A blue arrow points from the text 'Rejection Reasons tab' in the list to the 'Rejection Reasons' tab.

Grants	Enrollment	Transactions	Tracking	Rejection Reasons	
Academic Year	Grant	Enrollment Period	CPS Number	Reason	
2021 - 2022	CC	FALL	2	NOT NC RESIDENT	
2021 - 2022	CC	FALL	2	PREVIOUS BACHELOR DEGREE	
2021 - 2022	CC	FALL	2	EFC AND/OR TAXES PAID NOT IN ELIGIBLE RANGE	
2021 - 2022	ELS	FALL	2	NOT NC RESIDENT	
2021 - 2022	ELS	FALL	2	PREVIOUS BACHELOR DEGREE	

State Grants FAQs

Why isn't this student packaging/funded/eligible?

Common Rejection Reasons

- NOT AN NC RESIDENT – From FAFSA only, not related to RDS
- PREVIOUS BACHELOR DEGREE
- EFC AND/OR TAXES PAID
- STUDENT HAS REACHED MAXIMUM NUMBER OF PERIOD AWARDS
- NOT TITLE IV AID ELIGIBLE

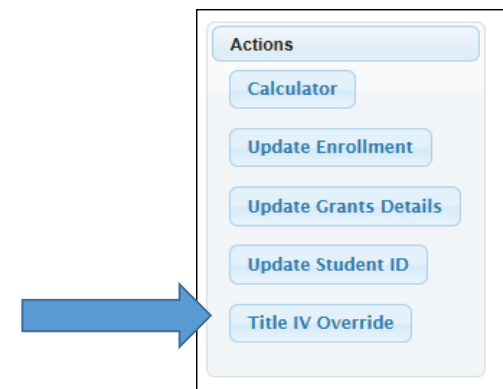
State Grants FAQs

Why isn't this student packaging/funded/eligible?

NOT TITLE IV AID ELIGIBLE

- Can be overridden by college
- College should retain documentation that default or overpayment satisfied
- Student rejected due to disability discharge or other Title IV eligible reason sometimes are rejected- these should be overridden by college

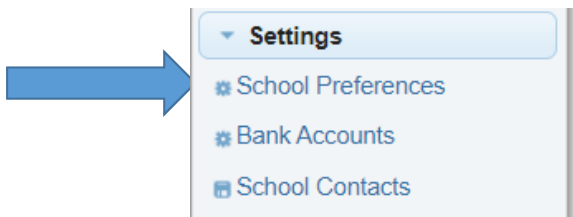
Maintenance, Student



State Grants FAQs

Where are my disbursements?

- Update your earliest first disbursement date
- If it is on or after your earliest first disbursement date, grants certified by COB Tuesday will disburse that week.



School Preferences

Roster Order:

Roster Flow:

Lock CPS:

Disbursement Frequency:

Academic Year Specific

Academic Year:

Download Layout:

Download Type:

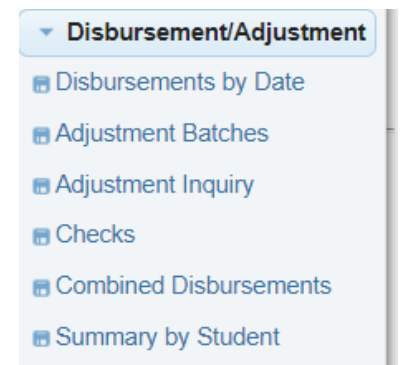
Use sFTP File Transfer: Yes

Term	Earliest Disbursement
FALL	<input type="text" value="09/22/2021"/>
SPRG	<input type="text" value="04/01/2022"/>

State Grants FAQs

What is going on with my grant returns/reconciliation?

- Adjustment Batches – shows adjustments that have been posted and those not yet posted- place to batch and get reports to return funds
- Adjustment Inquiry – report showing all adjustments and the status
- Checks – shows checks from college and if applied, what students/awards
- Combined Disbursements- file for reconciliation
- Summary by Student – report for reconciliation showing summary by student



State Grants FAQs

What is going on with my grant returns/reconciliation?

Adjustment Batches


- Processed = all posted
- Actions- click icon to show who is in the batch
- Add A Batch- unbatched, unprocessed adjustments

Grant Adjustments

Academic Year: 2020-2021

Select a Batch to View or Update
or

Add a Batch

Adjustment Batch	Adjustment Total	Status	Action
7352	(\$1,860.00)	Processed	
7351	(\$1,033.00)	Processed	
7228	(\$1,256.00)	Processed	

State Grants FAQs

What is going on with my grant returns/reconciliation?

Add A Batch

- Select and batch to get a report
- If funds should not be returned, college must correct student record to resolve discrepancy

Grant Adjustments

Academic Year: 2020-2021

Adding a New Batch

Include	SSN	Student ID	Last Name	First Name	Enrl Period	Grant	Enrl Status	CPS #	Low Cost	Award Cap	Amount
<input type="checkbox"/>		0000	MENEZ JR	WIGBERTO	SPRG	CC	F	1		\$0.00	(\$300.00)
<input type="checkbox"/>		0000	'ARRINER	SHARINA	FALL	CC	W	1		\$0.00	(\$217.00)
<input type="checkbox"/>		0000	'ARRINER	SHARINA	FALL	ELS	W	1		\$0.00	(\$876.00)

State Grants FAQs

What is going on with my grant returns/reconciliation?

Adjustment Inquiry

Enrl Period	Grant	Amount	Date	Batch	Check Number	Date	Amount Posted
FALL	ELS	(\$129.00)	Not complete	0			
FALL	CC	(\$300.00)	Not complete	0			
FALL	CC	(\$227.00)	05/18/2021	7352	9101211	05/05/2021	\$2,893.00
FALL	ELS	(\$1,283.00)	05/18/2021	7352	9101211	05/05/2021	\$2,893.00

State Grants FAQs

What is going on with my grant returns/reconciliation?

Checks

Adjustment Checks					
Check Number	Check Amount	Check Date	Status	Action	
9101211	\$2,893.00	05/05/2021	Posted		
9099411	\$1,256.00	03/26/2021	Posted		
9097806	\$1,545.00	01/06/2021	Posted		
9097177	\$1,246.00	11/19/2020	Posted		

Detail for Check 9101211

Check Amount: \$2,893.00

Adjustments Totaling (\$2,893.00)							
Student SSN	Student ID	First Name	Last Name	Academic Year	Enrl Period	Grant Type	Amount
	037146	NOAH	RIVERA	2021	SPRG	CC	(\$350.00)
	391203	RYAN	PARRA	2021	FALL	CC	(\$227.00)

State Grants FAQs

What is going on with my grant returns/reconciliation?

Combined Disbursements – Community Colleges

- Report reflects ONLY posted adjustments
- If funds are due back and not yet posted by CFI, report shows pre-adjusted amount
- Your reconciliation won't balance until funds are returned
- Correct any erroneous adjustments

Combined Disbursements Report

Academic Year: 2020-2021 ▼
Period: Year By Term ▼
Grant Type: All ▼
Download Type: Flat file ▼

Submit

State Grants FAQs

What is going on with my grant returns/reconciliation?

Combined Disbursements – Privates and UNC's

- Can run in two modes
 - Pending- All Adjustments- amounts reflect unposted adjustments
 - Actual – Posted Adjustments – amounts only posted adjustments
- Correct any erroneous adjustments
- Return legitimate adjustments

Combined Disbursements Report

Academic Year: 2021-2022

Period: Year By Term

Grant Type: All

Process Type: Pending - All Adjustments

Download Type: Actual - Posted Adjustments
Pending - All Adjustments


Submit

State Grants FAQs

What is going on with my grant returns/reconciliation?

Summary by Student

- Shows all disbursements (pending and actual)
- Shows all adjustments (pending and posted)
- Shows disbursement date
- Shows NET to student after all adjustments posted and disbursements made

CPS # ⇅	Grant Type ⇅	Enrl Period ⇅	Disbursements Posted	Disbursements Pending	Last Disbursement ⇅	Adjustments Posted	Adjustments Pending	Net	Actions
3	NBS	FALL	\$2,920.00	\$0.00	10/06/2021	\$0.00	\$0.00	\$2,920.00	
2	NBS	FALL	\$3,920.00	\$0.00	09/01/2021	\$0.00	\$0.00	\$3,920.00	
6	NBS	FALL	\$3,120.00	\$0.00	09/01/2021	\$0.00	\$0.00	\$3,120.00	

State Grants FAQs

I entered a withdrawal calculation incorrectly, or something changed. How do I fix it?

1. Enter the original enrollment status on the portal to reverse the calculation

OR

Pull student up in Return of Funds Calculator. You will be asked if you would like to reset the withdrawn status.

2. Re-do the calculation using Return of Funds Calculator if needed

Return of Funds Calculator

i Student already in a withdrawn status.

Student Information			
Academic Year:	2022	Academic Term:	FALL
First Name:	TYRONE	Last Name:	SHADE
SSN:	00	Date of Birth:	

[Print Withdrawal Calculation Report](#) [Reset Withdrawn Status](#) [Change Student](#)

State Grants FAQs

A student dropped some classes, but didn't withdraw. How do I adjust the grant?

- Students may be awarded at the enrollment status on the census date (or equivalent) as long as they did not completely withdraw
- Even if the grant has not yet disbursed, you may certify at the enrollment status at census

(If the student DID withdraw, certify at census enrollment status and then do withdrawal calculation)

- Follow your school or sector policy regarding number of hours to certify in grants
- CONSISTENCY is key

State Grants FAQs

How do I add new contact information?

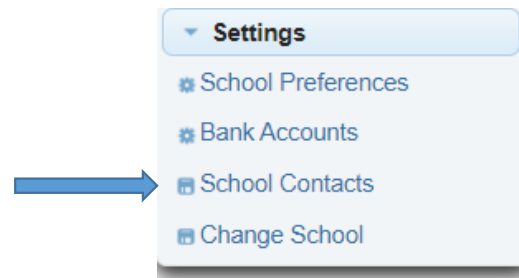
School Contacts

- Add, edit, delete contacts
- Sign up for notifications
- **Not related to user login admin**

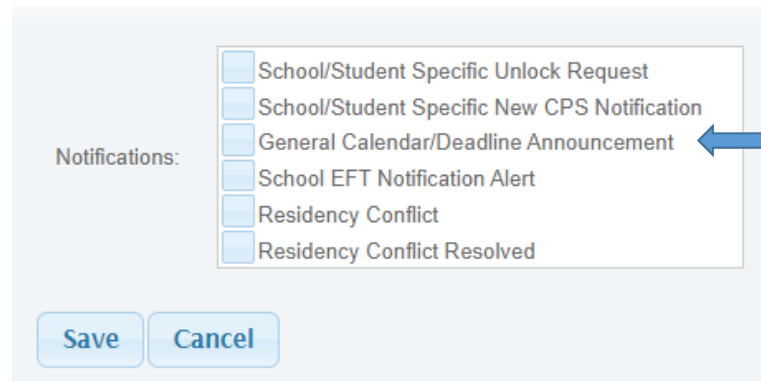
School Contacts

Contact Type
Financial Aid Office Director
Business Office Contact
ASSISTANT DIRECTOR OF FINANCIAL AID
ASSISTANT DIRECTOR OF FINANCIAL AID

[Add Contact](#)



Why am I not getting notifications?



Announcement emails from CFI – email list

State Grants FAQs

How do I set up new users/reset passwords?

USER ADMINISTRATION

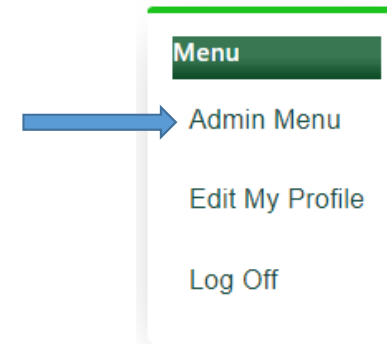
- User admin for State Grants and Loans
- Usually FAD has admin authority to add, edit, remove users
- Reset passwords and re-enable accounts
- Navigate to CFNC.org, Education Professionals, Financial Aid Administrator Resources, Loan Certification and User Management
- Direct link: <https://www9.cfnc.org/extranet/Gateway?command=AdminGateway&title=faa>

State Grants FAQs

How do I set up new users/reset passwords?

USER ADMINISTRATION

- Navigate to Admin Menu
- A list of your users will be displayed
- Use links to enable/disable, edit, reset password, delete user



rid	Days Since Last Sign On	Enabled / Disabled	Edit User	Reset Password	Delete User
9		Enabled	Edit	Reset	Delete
17	1	Enabled	Edit	Reset	Delete
	23	Enabled	Edit	Reset	Delete
	5	Enabled	Edit	Reset	Delete
	51	Enabled	Edit	Reset	Delete
	105	Disabled	Edit	Reset	Delete

State Grants FAQs

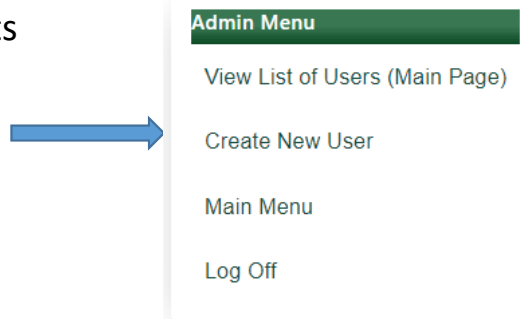
How do I set up new users/reset passwords?

USER ADMINISTRATION

Add a user

From the left navigation, you can Create a New User

- Select needed roles
- **Let your new user know the username and password. The system does NOT automatically send emails to new users**
- Separate function from School Contacts



Required fields are marked with an asterisk (*).

SELECT USER ROLES

- | | |
|---|---|
| FAA Loan Certifier <input type="checkbox"/> | FAA Grant Certifier <input type="checkbox"/> |
| Non NC FAA Admin <input type="checkbox"/> | College Payment Plan Administrator <input type="checkbox"/> |
| FAA Administrator <input type="checkbox"/> | Grants Viewer <input type="checkbox"/> |
| Loans Viewer <input type="checkbox"/> | CPP Viewer <input type="checkbox"/> |
| SEAA Portal User <input type="checkbox"/> | Default Prevention <input type="checkbox"/> |
| Aid Estimator <input type="checkbox"/> | Financial Literacy <input type="checkbox"/> |
| Financial Literacy Admin <input type="checkbox"/> | Aid Verification <input type="checkbox"/> |
| Aid Verification Level1 <input type="checkbox"/> | Aid Verification Level2 <input type="checkbox"/> |
| Exsel Administrator <input type="checkbox"/> | Exsel Financial Education <input type="checkbox"/> |

NAME

Title:

First

Name:*

Middle Initial:

Last

Name:*

Suffix:

ACCOUNT INFORMATION

User Name:

Password:*

Confirm Password:*

CFI INFORMATION

Email

Address:*

State:

School:*

Submit

State Grants

Comprehensive, Sector Specific training coming up later this month or early December

Look for an email for dates and times

QUESTIONS?