UNIT RECORD REPORT MANUAL:
2014-15 ACADEMIC YEAR

JUNE 2015

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UNIT RECORD REPORT

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OVERVIEW

The Unit Record Report (URR) is a student-specific report of financial aid awarded to resident and nonresident students attending the Washington institutions that participate in the State Need Grant program. It provides comprehensive information on federal, state, private, and institutional financial aid distributed to need-based financial aid recipients. The report also includes information about federal borrowing for non-need based loan recipients.

Unit Record Report History

The Unit Record Report (URR) was developed in response to 1969 legislation that created the State Need Grant program and called for ongoing analysis of student financial aid (RCW 28B.92.050). The first URR was collected in 1972. Every institution that participates in the State Need Grant program is required to complete the URR at the conclusion of each fiscal year.

The Washington Student Achievement Council's authority to collect the URR is established in the following statutes:

- RCW 28B.92.040. "... (1) The office shall be research oriented, not only at its inception, but continually through its existence. ... (3) The office shall take the initiative and responsibility ... to ensure that the state recognizes the maximum potential effect of these programs, and shall design state programs that complement existing federal, state, and institutional programs..."

- RCW 28B.92.050. "The office shall have the following powers and duties: (1) Conduct a full analysis of student financial aid ... Such an analysis will be a continuous one and will yield current information relevant to needed improvements in the state program of student financial aid ... (2) Design a state program of student financial aid based on the data of the study referred to in this section. The state programs will supplement available federal and local aid programs."

Compliance with the Family Educational Rights and Privacy Act (FERPA)

Federal regulations (34 CFR 99.31(a)(3)(iv)) authorize institutions to disclose personally identifiable information on the URR without the student's consent. This authority is based on the Council's statutory charge, as cited above, and the need for student-specific information to carry out the administrative and research responsibilities of the Council.

As required by 34 CFR 99.35(a)(1), the Council ensures that use of the URR data will not permit identification of students to individuals other than authorized representatives of the Council.

Unit Record Report Uses

Student-level data with term-by-term program-specific financial aid information is needed by the Council to conduct research; design state financial aid programs that complement other existing federal, state, and institutional programs; describe recipient populations; and administer and evaluate state financial aid programs as required by state law. The URR is the primary data source used by the Council to comply with these statutory requirements.

Data from the URR are used to:

- Provide financial aid data to the Education Research and Data Center (ERDC). These data, in combination with academic and workforce records, may be used by Council staff and other researchers to conduct longitudinal research on the educational and occupational achievements of financial aid recipients.

- Analyze the adequacy of financial aid resources available to financially needy Washington students.

- Describe funding trends and the characteristics of students receiving various types of financial assistance.

- Estimate funding needs and support budget requests for state-funded financial aid programs.

- Estimate the impact of new financial aid programs, changes in program policies, and altered funding levels.

- Contribute to student financial aid policy analysis and program evaluation.

- Respond to legislative requests for information about student financial aid programs available to Washington students.

The URR significantly reduces the number of ad hoc data requests of institutions.

Use of Unit Record Report for Research Purposes

The Council has expanded the scope of data uses for the URR. Data-sharing requirements were established with Engrossed Substitute House Bill 2261, 2009 Regular Session (RCW 43.41.400) to answer "critical questions" from various stakeholders and policymakers and non-critical questions developed by the general public. This bill requires the ERDC at Office of Financial Management (OFM) to gather P-20 data for public colleges and universities in order to conduct longitudinal data analysis.

Data-sharing agreements have been developed to permit sharing of URR data to the P-20W warehouse at OFM on behalf of the public institutions. URR data for private institutions will not be disclosed to OFM without their consent.

CHANGES OR EMPHASIS IN 2014-15 UNIT RECORD REPORT

Changes in field requirements are listed below. For additional guidance and instructions for these fields, see Chapter 2: Data Definitions and Appendix B: Record Layout. Most field names shown here are hyperlinked to the corresponding field names in Appendix B.

- **SSN:**

  - **Students Reported in Interim Report:** The social security number field must match data reported in the Final Interim Report for State Need Grant (SNG) and College Bound Scholarship (CBS) recipients. As a reminder, the order of preference is as follows:

    - Social Security Number
    - Nine-digit tax identification number
    - WASFA applicant identification number (from Need Access; begins with '980')

    Institutions will receive an error edit at upload for those SSNs whose data do not match previously reported Final Interim Report data. SSNs that are reported in the institution's Final Interim Report but do not appear in the Unit Record Report will be shown as differences in the SNG/CBS/Passport Discrepancy Report.

  - **Students Not Reported in the Interim Report:** When reporting data for a student who does not appear in the SNG and CBS final Interim Report, populate the SSN field by entering the nine-digit number used in your institutional reporting.

- **Consistency with other WSAC Reporting**: Information provided in the URR for programs such as SNG, CBS, and Passport to College will be compared on a recipient basis with information submitted in the Final Interim Report and other WSAC reports. Generally, the total funds reported for each recipient should be the same for all of the reports. For any difference of greater than $10 per student, institutions will need to either reconcile the reports or provide an edit override explanation.

- Year in School – If need-based aid is reported for Running Start students or other students who have not yet graduated from high school, their status should be reported as '8' or 'Other'.

- Family Income: Report family income amounts from your system even if they are higher or lower than the system edit amounts. We prefer that you report the actual amounts and, if an edit occurs, indicate something like "actual income reported on FAFSA (or WASFA)." Having the actual income allows better reporting of family income levels.

- Changes in valid input ranges before edits are produced:

    o [Family Income](#) – Valid input range is -300000 to 600000.
    o [Cost of Attendance](#) – Valid input range is 0 to 250000.
    o [Expected Family Contribution](#) – Valid input range is 0 to 250000.
    o [Need Amount](#) – Valid input range is 0 to 250000. (Should your system calculate any need amounts as negative number, report those as 0)
    o [Federal Pell Grant](#) – Valid input range is 0 to 5730
    o [Federal Direct Subsidized Loans](#) – Valid input range is 0 to 20000.
    o [Federal Direct Unsubsidized Loans](#) – Valid input range is 0 to 90000.

- **Term Date Ranges for Clock-Hour Institutions**: Term date ranges for clock hour institutions now are stated as the date ranges shown in the 2014-15 SNG manual.

- **Washington Application for State Financial Aid (WASFA) data in absence of Free Application for Federal Student Aid (FAFSA) information**: In instances where FAFSA data is not available and a student has filed a WASFA form, WASFA data must be reported in lieu of FAFSA for those students. This applies mainly to DREAMers who received State Need Grants in 2014-15.

- **Institutions may test their upload file in the Portal training environment prior to uploading to the live URR Portal.** The data uploaded or manually entered into the training site is temporary and clears if left overnight. By using the training environment, institutions may find data edits and make corrections before attempting to make a final URR Portal submission. The training website is located:

    https://fortress.wa.gov/wsac/portaltraining

EARLY ANNOUNCEMENT: CHANGES UNDER CONSIDERATION FOR 2015-16 UNIT RECORD REPORT

Tuition waiver dollars are expected to be reported in the Unit Record Report (URR) for SNG and CBS recipients who received full or partial tuition waivers. A student's Cost of Attendance would reflect the tuition amount prior to application of the tuition waiver. The tuition waiver would be reported as a financial aid resource in either the Need-Based Institutional Gift Aid or Non-Need Based Institutional Gift Aid category, as appropriate. *Although this change is not expected until the 2015-16 URR, institutions are encouraged to report it this way for 2014-15 if possible.*

UNIT RECORD REPORT 2014-15 TIMELINE

August 2015:   Unit Record Report training webinars. Specific times and dates will be emailed during the summer.

August 17, 2015:   Unit Record Report Application available for initial uploading of data into the WSAC Secure Portal.

October 9, 2015:   Unit Record Report final submission date.

October/November 2015:   Council staff data editing and review.

December 2015:   Unit Record Report data finalized.

January 2016:   Unit Record Report Institutional Profile reports available for 2014-15 year.

Due Date for Unit Record Report: October 9, 2015

Institutions must submit complete and accurate data by the due date to meet the reporting deadline. Council staff are available for assistance if problems arise during the reporting process.

Institutions that do not meet this deadline, or that do not follow up promptly with necessary corrections, will not be considered as having met minimum administrative capability requirements. These institutions may be placed in a probationary or terminated status for participation in state financial aid programs.

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1. GENERAL INSTRUCTIONS

Students to be Included

Need-Based Recipients

One record must be submitted for each student at your institution who received any need-based financial aid, regardless of source. This includes Washington residents and nonresidents. All aid, including non-need based aid sources, must be reported for any student who received at least one form of need-based aid. All data for need-based recipients will go through a series of edits to help ensure accuracy of reported data.

Appendix A identifies the financial programs and aid types the Council considers as need-based for the URR. They are further differentiated by whether 2014-15 Free Application for Federal Student Aid (FAFSA) or Washington Application for State Financial Aid (WASFA) data are required to be submitted:

- **Need-Based Recipients (FAFSA required):** All 2014-15 FAFSA or WASFA data must be reported for all students receiving any aid shown in Appendix A as "Need-Based FAFSA or WASFA data required."

- **Need-Based Recipients (FAFSA optional):** If available, all 2014-15 FAFSA or WASFA data must be reported for all students receiving any aid shown in Appendix A as "Need-Based FAFSA data optional."

Requirements for FAFSA or WASFA data submission are further described in Chapter 2.

Non-Need Based Federal Loan Recipients

One record must also be submitted for each student at your institution who received non-need based federal loans from these programs: Federal Direct Unsubsidized Loans, Federal Parent PLUS Loans, and Federal Grad PLUS Loans.

Reporting Period

Report financial aid disbursed during the 2014-15 academic year. For need-based recipients this will include all academic and summer terms for which 2014-15 FAFSA or WASFA data were used. Aid reported may include summer 2014 funding and/or summer 2015 funding. Specific information on which summer aid terms should be reported is included in Chapter 2.

Report Current Information

Unless instructed otherwise, report the most current information on file. If adjustments were made in the needs analysis, or if a change in the student's status occurred during the year, report the latest information available from your system.

Reporting Application

Data will be collected through the WSAC Secure Portal. This program allows each institution to enter and edit data before submitting the final report to the Council. The application is available at https://fortress.wa.gov/wsac/portal. Chapter 3 contains detailed instructions for using the URR application.

Entering and editing data are an institutional responsibility. Council staff will provide technical assistance as needed to any institution experiencing problems with the application.

Every attempt is made by Council staff to ensure the accuracy of URR data. Council staff should be notified if an institution anticipates or identifies any errors after the report has been submitted. Data can be corrected if necessary.

General File and Data Formats

Data files must be in CSV format. A sample CSV file with required header labels is available on the Council website at: www.wsac.wa.gov/unit-record.

All financial aid fields are to be reported as integers. Round decimals to the nearest whole number. It is recommended to round down for decimals from .1- .49999, and to round up for decimals from .5-.99999.

Refer to Chapter 2 and Appendix B for valid values for each field.

For need-based aid recipients, the only negative numbers allowed are in the Family Income field. All other numbers provided must be zero '0' or positive numbers.

Uploading the CSV File

When uploading your CSV file, spaces are not allowed in the header row descriptions (e.g., Last Name will need to appear in the header row as LastName).

If a CSV file is not correctly formatted and/or does not contain all expected data elements, the upload will fail. In this case, information will be provided by the system to assist in fixing any errors or omission in the upload process. Refer to Appendix C for a list of system edits that prevent file upload and import.

Once a file uploads correctly, all records will be edited for valid values.

Profile Reports

After data from each institution have been reviewed and finalized by Council staff, 2014-15 profile reports will be made available to each institution via the URR application. Profile reports provide descriptive and summary statistics by state, sector, and institution for students who received need-based aid.

2. DATA DEFINITIONS

Before You Begin

Please review the contents of this chapter and Appendix B (File Format) to minimize errors during the submission process. Field names in this chapter are hyperlinked to the corresponding field names in Appendix B.

The order of presentation in this chapter generally follows the order of the File Format. The File Format also specifies which fields are required for each type of aid recipient. The following list shows items required for all recipients reported:

Required Fields for All Recipients:

- SSN (Social Security Number)
- Last Name
- First Name
- Gender
- Is State Resident
- Year In School
- Enrollment Status (for all five terms)
- Financial Aid Received (for all five terms for all programs)

General and Demographic Information

SSN
The student's nine-digit Social Security Number. Do not use spaces. Hyphens may be used. Duplicate Social Security Numbers are not allowed.

- **Students Reported in the Interim Report** - This should be the same "SSN" as reported in the SNG and CBS final Interim Report. The order of preference is as follows:

    o Social Security Number
    o Nine-digit tax identification number
    o WASFA applicant identification number (from Need Access; begins with '980')

    Institutions will receive an error edit at upload for those SSNs whose data do not match previously reported Final Interim Report data. SSNs that are reported in the institution's Final Interim Report but do not appear in the Unit Record Report will be shown as differences in the SNG/CBS/Passport Discrepancy Report.

- **Students Not Reported in the Interim Report** - When reporting data for a student who does not appear in the SNG and CBS final Interim Report, populate the SSN field by entering the nine-digit number used in your institutional reporting.

Institution Student ID

Public baccalaureate institutions: Use the nine-character PCHEES Student ID (element number PCH-E0310) as the first nine characters. If the number is fewer than nine characters, use leading zeroes. You may add additional characters up to 50 characters. This field is required for public institutions but is overrideable.

Community and Technical Colleges (CTCs): Use the nine-character, college-assigned student identification number (SID) as the first nine characters (include leading zeroes). You may add additional characters up to 50 characters. This field is required for public institutions but is overrideable.

Private institutions: You may use the identification number assigned to the student by the institution. The field is optional and may be left blank.

Last Name

Student's last name. If a student only has a first name, report that name as first name and last name.

First Name

Student's first name. If a student only has a first name, report that name as first name and last name.

Middle Name

Student's middle name or initial.

Date of Birth

Report date of birth using standard numerical U.S. date format - mm/dd/yyyy. The date should be in the range of 01/01/1939 to 12/31/1998. Note: 01/01/1980 (leading zeroes for month and day) and 1/1/1980 (no leading zeroes for month and day) are both acceptable formats. This is a required field when reporting FAFSA-based (and WASFA) aid types.

Gender

Report one of the following codes:

'1' or 'Male'

'2' or 'Female'

'3' or 'Unknown' (not permissible for FAFSA filers)

Is State Resident

Public Institutions: A "Washington resident" is defined as any student classified by the institution as a Washington resident for fee-paying purposes (RCW 28B.15.011-013).

Private Institutions: A "Washington resident" is defined as a student who meets the residency requirements for the purposes of the State Need Grant program. If the determination of residency has not been made for state-funded financial aid programs, the student's permanent mailing address may be used for determining residency on the URR.

Report one of the following codes:

> Washington Resident: 'y' or 'true'
>
> Nonresident: 'n' or 'false'

Year In School

Report the student's status as of the beginning of the term for which the last financial aid was disbursed for the 2014-15 URR year. This is from the institution's official records. Do not use FAFSA or WASFA to populate this field.

> ***Example 1:*** Student was classified as a sophomore in the fall term and received a disbursement. After the fall term, the student's classification changed to that of a junior. The student was classified as a junior at the final disbursement. This student should be reported as a '3' or 'junior/3rd year'.

> ***Example 2:*** Student was classified as a freshman at the beginning of the last term for which a 2014-15 disbursement was made. After this term was completed, the student had earned enough credits to enroll as a sophomore for the next term. This student should be reported as a '1' or 'freshman/1st year'.

Report one of the following codes:

> **'1' or 'Freshman/1st Year'** – Matriculated students with 0-44 quarter or 0-29 semester credit hours enrolled in two-year or four-year degree programs; or first-year students at vocational-technical or proprietary institutions. Do not include below 100-level remedial courses in determining credit hours.

> **'2' or 'Sophomore/2nd Year'** – Matriculated students with 45-89 quarter or 30-59 semester credit hours enrolled in four-year degree programs; or 45 or more quarter hours for students at CTCs enrolled in two-year degree programs; or second-year students at vocational-technical or proprietary institutions.

> **'3' or 'Junior/3rd Year'** – Matriculated students with 90-134 quarter or 60-89 semester credit hours enrolled in four-year degree programs. Include students who are in the first year of an applied bachelor's program if they have completed an associate degree program.

> **4' or 'Senior/4th Year'** – Matriculated students with 135 or more quarter or 90 or more semester hours enrolled in four-year degree programs. Include students who have not completed their degree program after the fourth year of a four-year program. Also include students in the fifth year of a five-year bachelor's program. Include students who are in the second year of an applied bachelor's program if they have completed an associate degree program.

> **'5' or 'Unclassified/5th Year'** – Students who hold a bachelor's degree and were not enrolled in a program leading to a graduate degree (master's or doctoral) or a graduate-level certificate. Include students who are working on a second bachelor's degree. Also include students with a bachelor's degree who are getting an associate degree. Use code '8' to count non-matriculated students without a bachelor's degree.

'6' or 'Graduate' – Students who hold a bachelor's degree and are enrolled in a program leading to a graduate degree (master's or doctoral).

'7' or 'Professional' – A student enrolled in any of the following degree programs: Chiropractic (D.C. or D.C.M.), Dentistry (D.D.S. or D.M.D.), Law (L.L.B. or J.D.), Medicine (M.D.), Optometry (O.D.), Osteopathic Medicine (D.O.), Pharmacy (Pharm.D.), Podiatry (D.P.M., D.P., or Pod.D.), Theology (M.Div., M.H.L., B.D., or Ordination), or Veterinary Medicine (D.V.M.).

'8' or 'Other' – Non-degree, non-matriculated, high school completion, or other students who cannot be classified as any of the above. This category includes Running Start and other students for whom need-based aid is reported but who have not yet graduated from high school.

Race/Ethnicity

The race and ethnicity categories in the URR reflect the U.S. Census Bureau data format adopted by the state's Office of Financial Management (OFM).

Hispanic origin is the only ethnicity category to be reported in the URR. The race categories in URR include: American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Pacific Islander, White, and Other. Two or more races may be reported.

Report data if available. Leave blank only if race or ethnicity information is not available or unknown.

Is of Hispanic Origin

A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race. Report one of the following codes:

> Yes: 'y' or 'true'

> No: 'n' or 'false'

Leave blank only if race or ethnicity information is not available or unknown.

Is Race American Indian or Alaska Native

A person having origins in any of the original peoples of North and South America (including Central America) who maintains cultural identification through tribal affiliation or community attachment. Report one of the following codes:

> Yes: 'y' or 'true'

> No: 'n' or 'false'

Leave blank only if race or ethnicity information is not available or unknown.

Is Race Asian

A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian Subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam. Report one of the following codes:

Yes: 'y' or 'true'

No: 'n' or 'false'

Leave blank only if race or ethnicity information is not available or unknown.

Is Race Black or African American

A person having origins in any of the black racial groups of Africa. Report one of the following codes:

Yes: 'y' or 'true'

No: 'n' or 'false'

Leave blank only if race or ethnicity information is not available or unknown.

Is Race Native Hawaiian or Pacific Islander

A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands. Report one of the following codes:

Yes: 'y' or 'true'

No: 'n' or 'false'

Leave blank only if race or ethnicity information is not available or unknown.

Is Race White

A person having origins in any of the original peoples of Europe, the Middle East, or North Africa. Report one of the following codes:

Yes: 'y' or 'true'

No: 'n' or 'false'

Leave blank only if race or ethnicity information is not available or unknown.

Is Race Other

Report students in this category only if students have explicitly identified with a **race** not listed above. Do not report Hispanic **ethnicity** in this category. Report one of the following codes:

Yes: 'y' or 'true'

No: 'n' or 'false'

Leave blank only if race or ethnicity information is not available or unknown.

FAFSA, WASFA, and Need-Related Fields

The following additional fields are required for need-based aid recipients with a 2014-15 FAFSA or WASFA on file.

- Marital Status
- Is Dependent
- Family Size
- Number in College
- Family Income
- Expected Family Contribution (EFC)
- Cost of Attendance (COA)
- Need Duration
- Need Amount

If the financial aid administrator made any adjustments (e.g., due to verification, updates from the student, or professional judgment decisions) the revised information should be reported.

Example 1: The student filed the FAFSA or WASFA as a dependent student. The financial aid administrator later documented a professional judgment decision that changed the student's dependency status to independent. In this case, the student should be reported as "independent."

Example 2: The student's family income for 2013 reported on the FAFSA or WASFA was $82,000. The student and parents petitioned to the financial aid office that the family income would be $55,000 for 2014 due to a lengthy period of unemployment. The adjusted income was approved and used to determine eligibility. In this case $55,000 would be reported as the family income.

These data are optional for non-need based federal loan recipients who did not receive need-based financial aid. After the URR is finalized, unnecessary FAFSA or WASFA non-aid related data will be deleted from all non-need based loan recipient records.

Marital Status
Report one of the following codes:

'1' or 'Unmarried' (including single, divorced, or widowed)

'2' or 'Married'

'3' or 'Separated'

Is Dependent

Report one the following codes:

        Dependent: 'y' or 'true'

        Independent: 'n' or 'false'

Family Size

The number of members in the student's household, including the student, as the Family Size.

For Dependent Student: Include the student, parents, siblings, and other dependents used in the needs analysis calculation. This number must be at least 2.

For Independent Student: Include the student, the student's spouse if applicable, dependent children, and any other persons used in the needs analysis calculation. This number must be at least 1.

Number In College

The number of family members, including the student, expected to be enrolled in an institution at least half-time between July 1, 2014, and June 30, 2015, in programs of study leading to college degrees or certificates. For dependent student filers, this should not include the student's parents unless a professional judgment decision was made to count them. This number must be at least 1.

Family Income

The family income used in computing the student's financial need. For most students, the family income will be for the 2013 calendar year as reported on the 2014-15 FAFSA or WASFA. This is a required field if reporting any of the following other items for a student: Expected Family Contribution, Need Amount, or Need Duration.

Only include integers (e.g., no decimals) and do not include dollar ($) signs. For any negative amounts, include a negative sign (-). For example, a negative family income of -$9,875 would be reported as: '-9875'.

Report the family income levels from your system even if they are higher or lower than the system edit amounts. We prefer that you report the actual amounts and, if an edit occurs, indicate something like "actual income reported on FAFSA (or WASFA)."

For Dependent Student: Parent(s)'s taxable and non-taxable income. Do not include the student's income.

For Independent Student: Sum of student's and spouse's taxable and non-taxable income.

Reporting Items in the Need Equation

Information reported in the four fields that follow may be reported based on the information available at the time of the recipient's first financial aid disbursement during the 2014-15 year.

- Cost of Attendance
- Expected Family Contribution
- Need Duration
- Need Amount

Many students will receive financial aid throughout the year with no changes made to the institution's record for these fields. However, if changes are made in an institution's data record, it is important for the data to be consistent. The following examples may be of assistance.

Example 1: Student is expected to enroll for a nine-month academic year. All four fields should be reported on this basis.

Example 2: Student was originally expected to enroll for a nine-month academic year. The student, however, did not return to school after the fall term. In this case, the institution may decide either to:

A. Not make any changes to these four fields. However, enrollment status and financial aid disbursement amounts must be reported accurately for all terms.
   or
B. Adjust all four fields in order to align with the actual term-by-term enrollment status.

Cost of Attendance

The estimated student budget upon which the Need Amount was calculated. Include tuition, fees, books and supplies, living, personal, and transportation expenses. The Cost of Attendance should be consistent with the number of months reported in the Need Duration.

Expected Family Contribution

This will usually be the Federal Methodology calculation produced by the U.S. Department of Education based on the 2014-15 FAFSA or WASFA. If a financial aid administrator has made a professional judgment decision to adjust the EFC, the adjusted EFC amount should be reported. This should be consistent with the number of months reported in the Need Duration. This is a required field if reporting any of the following other items for a student: Family Income, Need Amount, or Need Duration.

For Dependent Students: The expected family contribution is based on the information reported by the student and the student's parent(s) on the FAFSA or WASFA.

For Independent Students: The expected family contribution is based on the information reported by the student, and the student's spouse if applicable, on the FAFSA or WASFA.

Need Duration

The number of months for which the Need Amount was calculated and the Cost of Attendance was determined. For example, if a student's need amount and cost of attendance were based on nine months, the figure '9' would be reported. This is a required field if reporting any of the following other items for a student: Family Income, Expected Family Contribution, or Need Amount.

The Need Duration should be reported as integers from 1-12.

Need Amount

The amount of need used to determine the student's eligibility. This should equal the Cost of Attendance minus the Expected Family Contribution (EFC). This is a required field if reporting any of the following other items for a student: Family Income, Expected Family Contribution, or Need Duration.

> Cost of Attendance
> – Expected Family Contribution
> = Need Amount

If the above calculation results in a negative number, report the Need Amount as zero ('0'). Should a Need Amount be reported as a negative number, WSAC will adjust the URR to reflect a zero ('0').

Reporting Term Enrollment and Financial Aid for Five Terms

Enrollment and financial aid received must be reported on a term-by-term basis. When preparing the CSV file, follow the sample file format which replaces the word 'Term' with 'Summer 1', 'Fall', etc. for all fields for all five terms.

- Summer 1
- Fall
- Winter
- Spring
- Summer 2

Term enrollment and financial aid should be reported for all terms or time periods for which students received aid based upon the 2014-15 FAFSA or WASFA. For some institutions, this may cover the time period of July 2014–June 2015. For others, it may more closely represent the dates of August 2014–July 2015. It will not, in most cases, exceed 12 months. If you are reporting assistance for students who did not submit a FAFSA or WASFA, use the same time period for these students as you use for FAFSA or WASFA filers.

Quarter and Semester Term Institutions

Quarter institutions will use fall, winter, spring, and appropriate summer terms for the reporting of financial aid recipients.

Semester institutions will normally use fall, spring, and appropriate summer terms for the reporting of financial aid recipients. If there was specific grant, scholarship, or loan assistance disbursed to the student for the short period between the fall and spring semester, report as fall, winter, or spring term financial aid based on institution reporting preferences. If there was specific Federal Work Study, State Work Study, or Institutional Employment awarded for the time between fall and spring terms, you may report it as winter term.

Each institution with a **summer enrollment** period (typically between May and August) should report summer aid disbursements as a "leader" institution or as a "trailer" institution based on federal program rules. Institutions should report financial aid disbursed under "leader" rules as 'Summer 1' assistance. Institutions should report financial aid disbursed under "trailer" rules as 'Summer 2' assistance. If an institution has more than one summer term during the same summer, financial aid and term enrollment status should be combined and reported as a single summer term.

> *Example 1:* A student at a "trailer" institution received financial aid for two short summer sessions in 2015, based on the 2014-15 FAFSA or WASFA. The student received financial aid for 6 credits the first summer session (mid-May to late June) and received financial aid for another 6 credits the second summer session (early July to mid-August). Report all aid as 'Summer 2' with the student's enrollment status as full-time. 'Summer 1' enrollment and all financial aid fields will be '0'.

> *Example 2:* A student at a "leader" institution received financial aid for the summer 2014 term based on the 2014-15 FAFSA or WASFA. When this URR was being submitted, the student also received financial aid for the summer 2015 term (based on a 2015-16 FAFSA or WASFA). Report aid received during the summer of 2014 as 'Summer 1'. Report 'Summer 2' enrollment status and corresponding financial aid fields as '0'. (Note, in this case the 2015 summer enrollment and aid received will be reported on the 2015-16 URR.)

Combination of leader and trailer awards: If your institution awarded some programs under leader rules and other programs under trailer rules, leader awards should be reported in Summer 1 and trailer awards should be reported in Summer 2.

Continuous Enrollment Credit Hour Institutions and Clock-Hour Institutions

Some clock-hour institutions do not divide their school year into academic terms. These institutions should report each student's enrollment status and financial aid received in each of the five time periods. Each term should represent approximately 10 weeks. The reporting periods should be based on when the majority of enrollment occurred.

The terms and dates reported should be consistent with the information reported for State Need Grant in the CSAW portal application on the final interim report for the 2014-15 year.

Term Date Ranges for Clock-Hour Institutions

These reflect the same date ranges that appeared in the 2014-15 SNG manual.

Term	From	To
Summer 1	July 1, 2014	September 11, 2014
Fall	September 12, 2014	November 22, 2014
Winter	November 23, 2014	February 5, 2015
Spring	February 6, 2015	April 18, 2015
Summer 2	April 19, 2015	June 30, 2015

Term Enrollment Status

Enrollment should be reported based upon the student's status or scheduled clock hours at the time financial aid was disbursed or a fixed date such as the tenth day of enrollment.

Undergraduate Enrollment Status: Use the following codes for reporting enrollment status by number of undergraduate credits or scheduled clock hours per term.

Undergraduate Enrollment Status	Credits	Scheduled Clock Hours	URR Codes
Not Enrolled	n/a	n/a	'0' or 'Not enrolled'
Full-Time	12 or more	300 or more	'1' or 'Full time'
Half-Time	6 - 8	150 – 224	'2' or 'Half time'
Three-Quarter	9 - 11	225 – 299	'3' or '3/4 time'
Less Than Half-Time	Less than 6	Less than 150	'5' or '< Half time'

Graduate Student Enrollment Status: Use the following table for reporting enrollment status based on the institution's definition of enrollment status for graduate students.

Graduate Enrollment Status	URR Codes
Not Enrolled	'0' or 'Not enrolled'
Full-Time	'1' or 'Full time'
Half-Time	'2' or 'Half time'
Three-Quarter	'3' or '3/4 time'
Less Than Half-Time	'5' or '< Half time'

Reporting of Financial Aid Received

Use whole dollar amounts (no decimals and no dollar signs ($)) when reporting financial aid disbursements or funds received.

Do not report aid from one program in multiple URR fields. If there are two or more possible fields to report in, choose one or contact unitrecord@wsac.wa.gov for assistance.

For each aid program that follows, five terms are to be reported. Indicate '0' for all terms that a student did not receive specified aid or was not enrolled. Do not leave any fields blank.

Federal Aid Programs

Federal Pell Grant

The amount of Pell Grant funds received by the student.

Federal SEOG

The total amount of Federal SEOG funds received by the student. Include federal and institutional match awards.

Federal TEACH Grant

The amount of Federal TEACH Grant funds received by the student.

Federal Nursing Scholarships

The amount of federal scholarships and grants received by the student for nursing and other health professional training.

Federal Work Study

The student's gross Federal Work Study compensation. Include federal, employer, and institutional shares and include all employers, both on- and off–campus earnings. For institutions reporting fall and spring semesters, normally include any earnings received between the terms with either the fall or spring terms. Do not report this aid type as winter term aid unless there was a specific award made for the winter term.

There are two options for reporting work study earnings:

Actual Term Earnings: Institutions may report actual gross term earnings based upon monthly cutoff dates or institutional payroll dates. For example, a semester institution may report all earnings from September–December as fall term aid, and earnings from January–May as spring term aid (with '0' reported for winter aid). Quarter institutions may report September–December earnings for fall term, January–March earnings for winter term, and April–June earnings for spring term.

Average Term Earnings: Institutions may report average gross term earnings over the academic year for all terms for which the student had an Enrollment Status of half-time or higher. For example, if a student received $3,261 in earnings at a semester institution over the course of an academic year, it could be reported as $1,631 fall term earnings and $1,630 spring term earnings.

Federal Perkins Loan

The amount of Federal Perkins Loan funds received by the student.

Federal Nursing Health Loans

The amount of any Federal Nursing Student Loan or federal health professions student loan funds received by the student.

Federal Direct Subsidized Loans

The total gross amount borrowed by the student, including fees, from the Federal Direct Subsidized Loan program. Note this amount may not be the amount requested on the application form. This program may also be called the Federal Stafford Subsidized Loan.

Federal Direct Unsubsidized Loans

The total gross amount borrowed by the student, including fees, from the Federal Direct Unsubsidized Loan program. Note this amount may not be the amount requested on the application form. This program may also be called the Federal Stafford Unsubsidized Loan.

Federal Parent PLUS Loans

The total gross amount borrowed by the student's parent(s), including fees, from the Federal Parent PLUS Loan program. Note this amount may not be the amount requested on the application form.

Federal Grad PLUS Loans

The total gross amount borrowed by the student, including fees, from the Federal Grad PLUS Loan program. Note this amount may not be the amount requested on the application form.

State Aid Programs

State Need Grant

The amount of State Need Grant funds received by the student. The amount reported should normally be the same amount reported on the Final Interim Report.

College Bound Scholarship

The amount of College Bound Scholarship funds received by the student. The amount reported should normally be the same amount reported on the Final Interim Report.

Passport to College Scholarship

The amount of Passport to College Scholarship funds received by the student. In the unusual circumstance that an incentive grant is used to enhance a student's financial aid award, the incentive grant must be reported as financial aid received by the student in the URR. For example, if the student received a $4,500 Passport to College Scholarship and a $500 incentive grant payment, the institution should report that the student received a $5,000 Passport to College Scholarship on the URR.

GET Ready for Math & Science

The amount of GET Ready for Math & Science scholarship funds received by the student.

Opportunity Scholarship

The amount of Opportunity Scholarship funds received by the student. This program may also be called the Washington State Opportunity Scholarship administered by the College Success Foundation.

SBCTC Opportunity Grant

The amount of State Board for Community and Technical College (SBCTC) Opportunity Grant funds received by the student. Note this grant is only available to students attending community, technical, and select private career institutions.

Other State Funded Gift Assistance

The amount of other state scholarships and grants received by the student (e.g., Global Opportunity Grants [applies to UW only], Early Achievers Opportunity Grants, GEAR UP, Washington Scholars, WAVE, and/or the American Indian Endowed Scholarship), that are not included in another state aid category.
Note that family-purchased Guaranteed Education Tuition (GET) fund distributions are not to be reported in the Unit Record Report. However, GET funds received by the student as a GEAR UP program distribution must be reported as Other State Funded Gift Assistance.

On-Campus State Work Study

The student's gross on-campus State Work Study compensation. Include state and institutional share.

For institutions reporting fall and spring semesters, normally include any earnings received between the terms with either the fall or spring terms. Do not report this aid type as winter term aid unless there was a specific award made for the winter term.

There are two options for reporting work study earnings:

Actual Term Earnings: Institutions may report actual gross term earnings based upon monthly cutoff dates or institutional payroll dates. For example, a semester institution may report all earnings from September–December as fall term aid, and earnings from January–May as spring term aid (with '0' reported for winter aid). Quarter institutions may report September–December earnings for fall term, January–March earnings for winter term, and April–June earnings for spring term.

Average Term Earnings: Institutions may report average gross term earnings over the academic year for all terms for which the student had an Enrollment Status of half-time or higher. For example, if a student received $3,261 in earning at a semester institution over the course of an academic year, that could be reported as $1,631 fall term earnings and $1,630 spring term earnings.

Off-Campus State Work Study

The student's gross off-campus State Work Study compensation. Include state and off-campus employer share.

For institutions reporting fall and spring semesters, normally include any earnings received between the terms with either the fall or spring terms. Do not report this aid type as winter term aid unless there was a specific award made for the winter term.

Note: The same two options for reporting earnings (see above section) are available.

If the institution acts as the employer of record and the student works off campus, it is preferable for earnings to be reported as off-campus State Work Study. If accounting constraints do not permit earnings to be recorded as off-campus, the earnings may be reported as on-campus State Work Study.

WorkForce Training Funds

The amount of Worker Retraining Program funds received by the student. Also include Work-Based Learning Tuition Assistance Funds and Basic Food Employment & Training (BFE&T) dollars in this category.

Institutional Aid Programs

Need-Based Institutional Gift Aid

The amount of all institutional grants, scholarships, and/or waivers awarded solely or partially on the basis of need.

Institutional scholarships, grants, and waivers awarded only on the basis of merit or other non-need based criteria should be reported as Non-Need Based Institutional Gift Aid.

Non-Need Based Institutional Gift Aid

The amount of institutional scholarships, grants, and/or waivers received by the student not based on a review of the 2014-15 FAFSA, WASFA, or other need determination.

Institutional grants, scholarships and waivers awarded solely or partially on the basis of need should be reported as Need-Based Institutional Gift Aid.

Institutional Employment

The student's gross non-work study institutional employment earnings (on- or off-campus) if the employment was included as part of the student's financial aid package.

Also include WorkFirst work study funds and any amounts from the institutional aid fund distributed as institutional employment.

Do not include earnings reported as Federal Work Study or State Work Study.

For institutions reporting fall and spring semesters, normally include any earnings between the terms with either the fall or spring terms. Do not report this aid type as winter term aid unless there was a specific award made for the winter term.

Institutional Loans

The amount of all institutional loans disbursed to the students. Do not include "short term" or "emergency" loans generally repaid within a few months.

Other Financial Aid Programs

If there are any additional conditional, private, or other loans that have not been reported elsewhere, report the loan amount received by the student in one of the next three categories. Choose the category that fits best.

Conditional Loans

The amount of scholarships, grants, and loans received by the student and not reported elsewhere that have the potential for loan repayment if required conditions are not met. Examples include state-funded conditional scholarship programs and other conditional scholarship/loans such as Alternative Routes to Teaching Certification and Future Teachers Conditional Scholarships.

Private Loans

The amount of PREP loans, community foundation loans, and all other private loans received by the student and not reported elsewhere.

Other Loans

The amount of Canadian, Micronesian, Alaska Student Loans, and other agency or government loans received by the student and not reported elsewhere, such as the Aerospace Loan Program (ALP).

Outside Scholarships

The amount of known outside or private scholarships funds received by the student.

Include National Merit, employer-funded tuition assistance, company, service club, and any other private scholarships or grants not reported elsewhere.

Scholarships funded by the institution's foundation or endowment should be reported as either Need-Based Institutional Gift Aid or Non-Need Based Institutional Gift Aid.

Other Agency Assistance

The amount of scholarships and grants received by the student from other agencies or government sources not reported elsewhere.

Include Department of Labor and Industries, Services for the Blind, Workforce Investment Act, Vocational Rehabilitation, AmeriCorps Education Award, Bureau of Indian Affairs (BIA), Reserve Officers' Training Corps (ROTC), Chapter 31 and 33 Veterans Benefits or other Veterans Benefits, federal scholarships for TRIO students, and other agency assistance.

3. REPORTING APPLICATION USER'S GUIDE

This section provides instructions for the Portal-based URR application. This application is used to create and submit your institution's URR to the Council.

This section starts with an overview of the application and continues with step-by-step instructions.

Accessing the Portal Application

The URR application can be found on the Council's Portal Website: https://fortress.wa.gov/wsac/portal. Enter your email address and password in the top right corner to login. If you do not have access to the Portal, contact Council staff at unitrecord@wsac.wa.gov.
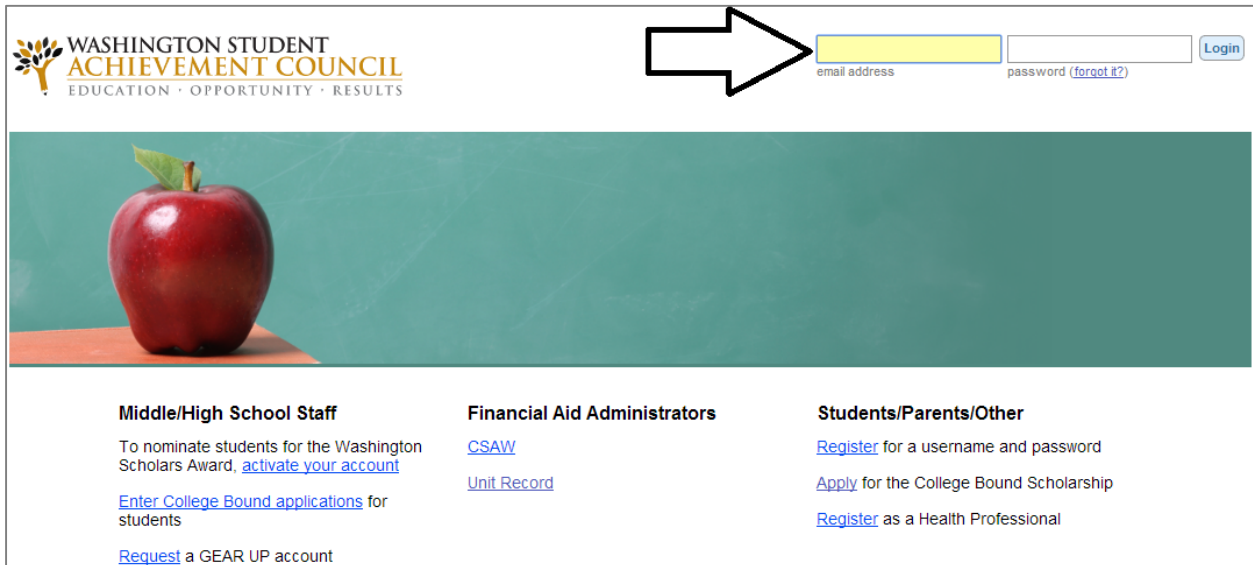
Under the "Programs" menu, across the top, click on "Unit Record." Note: Your menu may have different options depending on the programs you have permission to access. If "Unit Record" does not show in your menu, contact Council staff at unitrecord@wsac.wa.gov.

The following screen should appear on your first log-in. If your URR data has been uploaded previously, you will be taken directly to your current status on log-in: "Ready to Begin," "In Progress," or "Submitted."

Welcome to the Unit Record Warehouse!

The Process:

1. Upload your student data file

2. Address any errors in the data and override as necessary

3. Optionally review or add individual student records

4. When the data is complete, review and submit the report

Next: Proceed to Upload

Uploading Data from a File
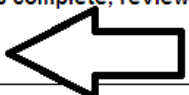
From the "Welcome" screen, click on the "Next: Proceed to Upload" button.

Welcome to the Unit Record Warehouse!

The Process:

1. Upload your student data file

2. Address any errors in the data and override as necessary

3. Optionally review or add individual student records

4. When the data is complete, review and submit the report

Next: Proceed to Upload

Click on the "browse" button to find the file you want to upload. Be sure to select a file saved in a CSV format, then click on the "upload" button. CAUTION: If uploading a new file, all prior data and overridden errors will be deleted from the system.

PLEASE NOTE: Each upload attempt represents a FRESH start. All existing data for the year will be deleted.

Large CSV files (over 10MB) should be zipped before uploading.

No file selected...   📁 browse

upload   anually

The upload process may take a while, depending on file size. The following "Processing file" progress bar can be used to determine how much of the file has been processed.
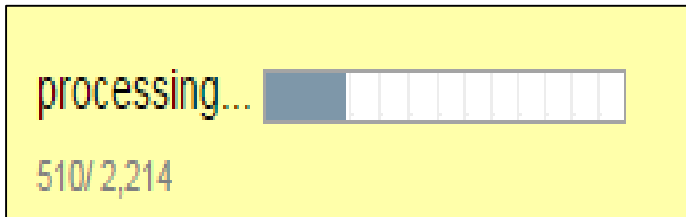
If the file contains errors, you will see a message, like the one below, indicating that you need to correct your file and resubmit. From here, you can either click on the "discard file" button to return to the upload page or click on the "download errors to csv" button to see a complete list of errors in your file.

⚠ **This file cannot be saved due to errors. Please correct your file and resubmit.**

The following errors were encountered:

- Row 5: Field 'SSN' is required
- Row 5: Field 'IsStateResident' is required
- Row 5: Field 'LastName' is required
- Row 5: Field 'YearInSchool' is required
- Row 5: Field 'Summer1EnrollmentStatus' must contain a value.
- Row 5: Field 'Summer1CollegeBoundScholarship' must contain a value.
- Row 5: Field 'Summer1ConditionalLoans' must contain a value.
- Row 5: Field 'Summer1FederalGradPLUSLoans' must contain a value.
- Row 5: Field 'Summer1FederalNursingHealthLoans' must contain a value.
- Row 5: Field 'Summer1FederalNursingScholarships' must contain a value.
- Row 5: Field 'Summer1FederalParentPLUSLoans' must contain a value.
- Row 5: Field 'Summer1FederalPellGrant' must contain a value.
- Row 5: Field 'Summer1FederalPerkinsLoan' must contain a value.
- Row 5: Field 'Summer1FederalSEOG' must contain a value.
- Row 5: Field 'Summer1FederalDirectSubsidizedLoans' must contain a value.
- 780 additional errors...

download errors to csv   discard file

Editing Student Records

If the file uploads successfully, you will see the following message. Verify the number of students uploaded and Year In School distribution with your records. If the numbers are correct, click the "Proceed to Edits" button. To start over, click the "Discard Upload" button.

File Upload Complete!

Press 'Proceed to Edits' if the uploaded data appears to be correct. Otherwise, press 'Discard Upload' to start again.

Proceed to Edits	Discard Upload	
Total Student Rows		3
Year In School Counts -		
Freshman/1st Year		1
Sophmore/2nd Year		1
Junior/3rd Year		1

The Edit process may take a while. Monitor the progress bar at the top, which will disappear when all student records have been reviewed. Click "refresh" to display edits.

processing...
310/ 457
We're currently processing your edits. You may start resolving edits as we process them. You can also leave this page or log out and come back when processing is complete.
Alternatively, we can email you a csv download of all your edits once processing completes.

Unit Record Edits

Showing results 1 - 10 of 18

refresh

On the Unit Record Edits page(s), the Overrideable column shows the edit type. "Overrideable" means you may fix the edit or override it and provide a reason. Non-overrideable edits (red hexagon) must be fixed.

Last processed on 6/10/2015 4:00:20 PM   download all edits into csv   Reprocess Edits   Delete Upload   Add a new unit record to the report

Unit Record Edits

43 errors (37 overrideable - 0 overridden; 0 informational)   Filter by Edit Type

Showing results 1 - 10 of 43   Show SNG/CBS/PTC discrepancies report

| SSN	Student ID	Last	First	Middle	Error	Overrideable
001176493	30453420398	FREDLEY	MANDY		College Bound Scholarship award not found in WSAC Interim Report	Overrideable
001176493	30453420398	FREDLEY	MANDY		College Bound Scholarship recipient not a state resident	🔴
001176493	30453420398	FREDLEY	MANDY		College Bound Scholarship Amount Differs From Interim Report (interim: 0; unit record: 1539)	Overrideable
539176494	388383065	GARVEY	BETTY		Federal Grad PLUS Loan recipient must be reported as graduate student	🔴
939176493	388383070	HUDON	JAIME		Invalid SSN, Tax or WASFA ID	Overrideable

1   2   3   next   5

To override an edit, click on the SSN number to open the student record. The errors are displayed at the top of the screen below the student's identifying information. In the student record, click on the "Override" button.
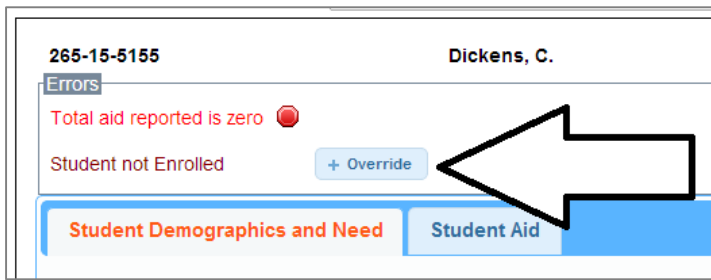
In the pop-up window, provide an explanation of the override, then click "Save".
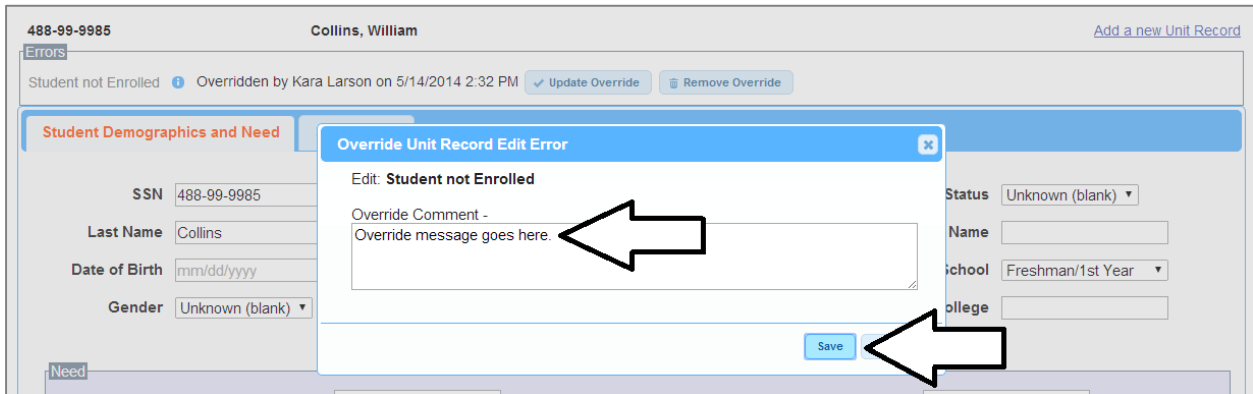
The overridden edit will appear gray instead of red in the errors list. To review any override comments you have made, hover the mouse over the blue information icon in the grayed-out error. Your comment will appear in a yellow box.
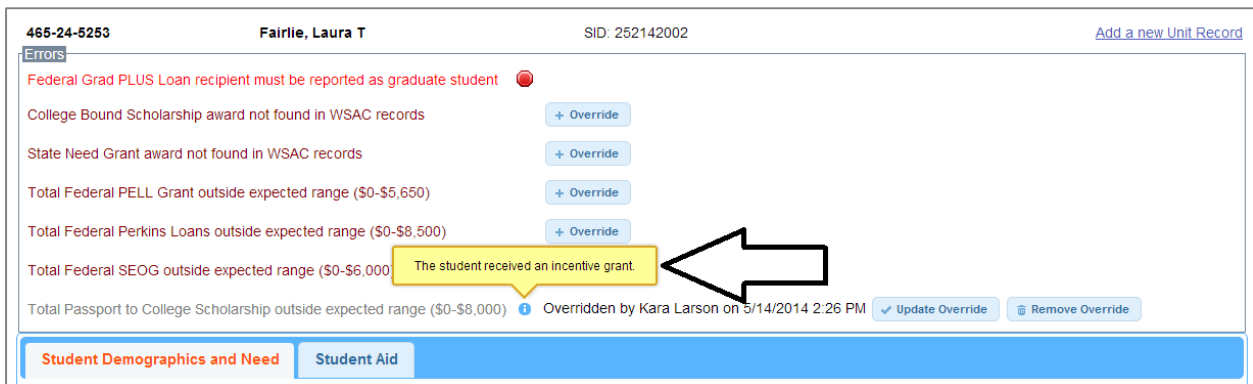

Address all errors in the errors list for each student record. If a student record only had edits that were corrected rather than overridden, there will be a green "No Errors" box at the top of the screen after all errors are corrected.
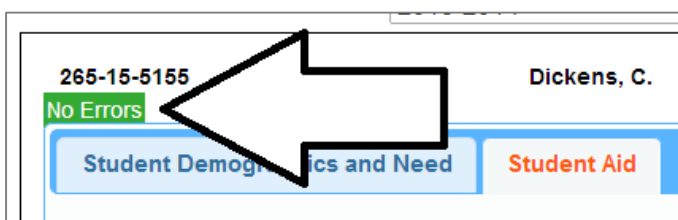
If a student record only had edits that were overridden, the gray "Errors" box at the top of the screen will remain, but it will no longer contain any red edit messages.
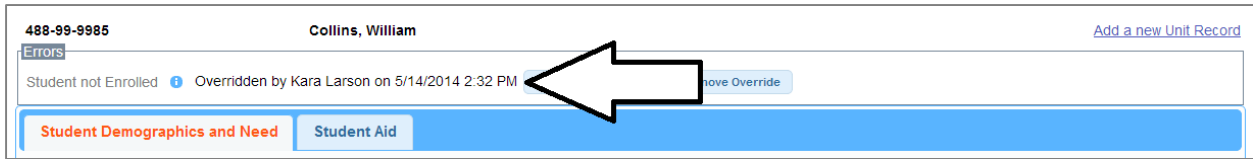

## Checking for Missing Data Previously Reported in WSAC Records

To identify data omitted from the URR but previously entered into the WSAC Interim Report or other Portal records for State Need Grant (SNG), College Bound Scholarship (CBS), or Passport to College (PTC) students, review the SNG/CBS/PTC discrepancy report, after you have corrected or overridden all errors identified on the Unit Record Edits page(s).
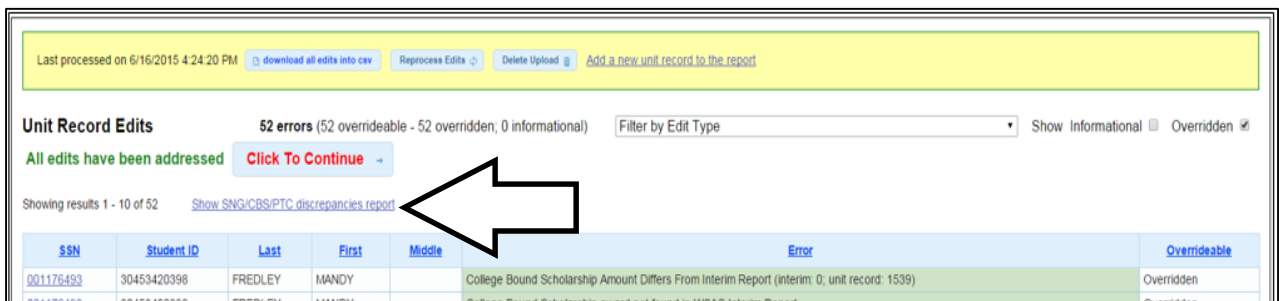

Discrepancies that you have already addressed through an override request are flagged with a "Y" to differentiate those records from discrepancies not yet addressed.
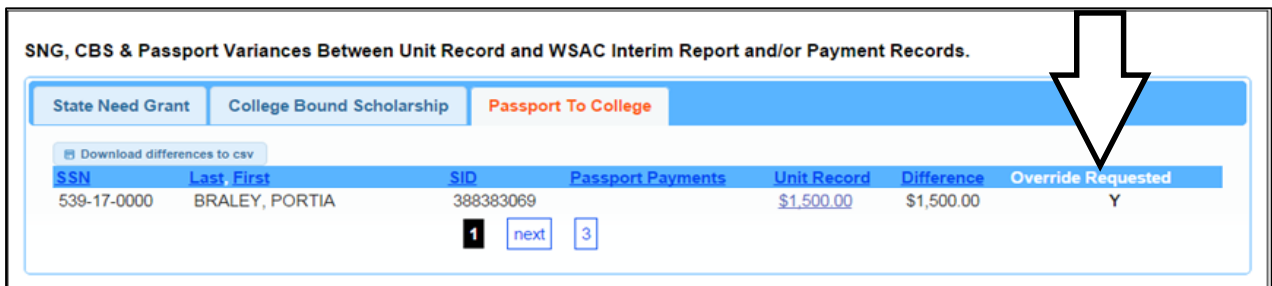
If additional discrepancies exist that do not show a "Y" in the "Override Requested" column, click the "Download differences to .csv" button to download and review a separate file to recognize unaddressed data edits, and to identify missing student records that must be added to the URR.
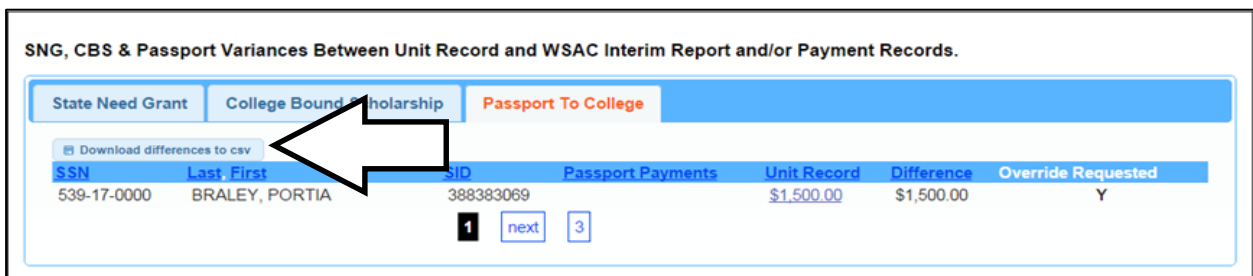
To add missing SNG/CBS/PTC payment data for records existing in your URR upload, click "Unit Record" at the top of the menu bar, which returns you to the Unit Record Edits page, then click "Search" to locate and edit the student record.
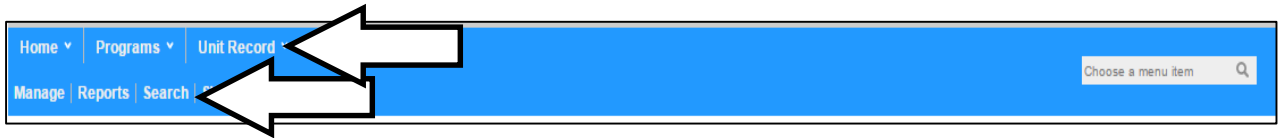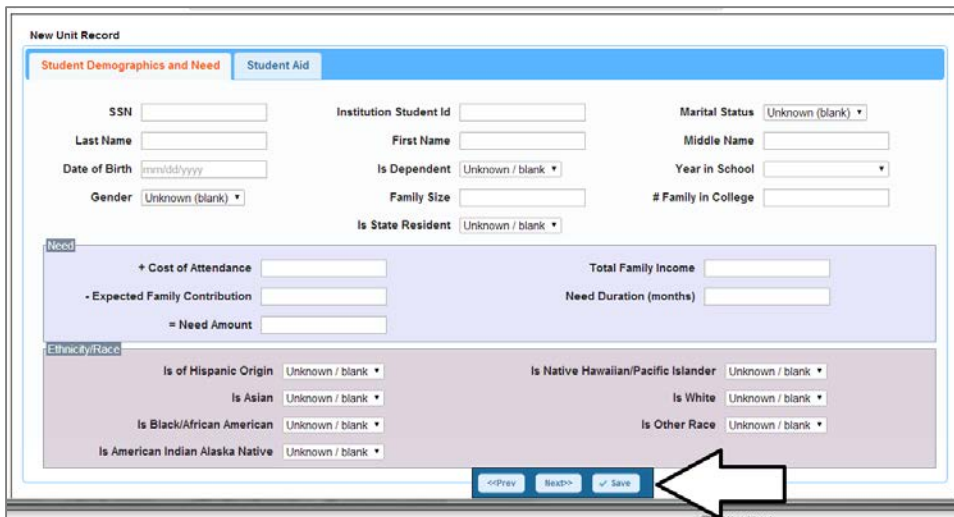

If an individual student record is missing from the URR entirely, see the "Adding Student Records Manually" section for instructions.

Adding Student Records Manually

To add student records manually, click on the "Add a new unit record to the report" at the top of the Unit Record Edits page.
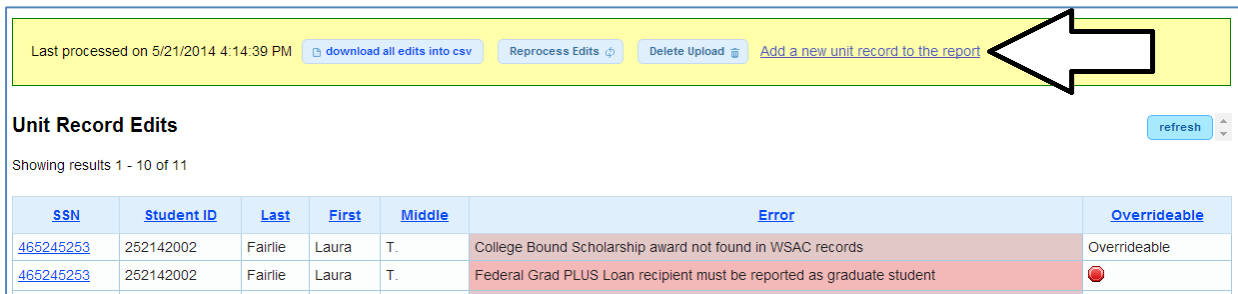
Enter the student's data in the blank form. Be sure to fill out all required fields and all other applicable fields in both tabs. Save the data by clicking the "Save" button at the bottom of either tab. Refer to the Editing Student Records section above if you get any errors.

New Unit Record

Student Demographics and Need	Student Aid

	Summer 1	Fall	Winter	Spring	Summer 2	Total
Enrollment Status	Not enrolled ▼	Not enrolled ▼	Not enrolled ▼	Not enrolled ▼	Not enrolled ▼	
Federal						
Federal Pell Grant	0	0	0	0	0	0
Federal SEOG	0	0	0	0	0	0
Federal TEACH Grant	0	0	0	0	0	0
Federal Nursing Scholarships	0	0	0	0	0	0
Federal Work Study	0	0	0	0	0	0
Federal Perkins Loan	0	0	0	0	0	0
Federal Nursing Health Loans	0	0	0	0	0	0
Federal Direct Subsidized Loans	0	0	0	0	0	0
Federal Direct Unsubsidized Loans	0	0	0	0	0	0
Federal Parent PLUS Loans	0	0	0	0	0	0
Federal Grad PLUS Loans	0	0	0	0	0	0
State						
State Need Grant	0	0	0	0	0	0
College Bound Scholarship	0	0	0	0	0	0
Passport to College Scholarship	0	0	0	0	0	0
GET Ready for Math Science	0	0	0	0	0	0
Opportunity Scholarship	0	0	0	0	0	0
SBCTC Opportunity Grant	0	0	0	0	0	0
Other State Funded Gift Assistance	0	0	0	0	0	0
On Campus State Work Study	0	0	0	0	0	0
Off Campus State Work Study	0	0	0	0	0	0
WorkForce Training Funds	0	0	0	0	0	0
Institution						
Need Based Institutional Gift Aid	0	0	0	0	0	0
Non-Need Based Institutional Gift Aid	0	0	0	0	0	0
Institutional Employment	0	0	0	0	0	0
Institutional Loans	0	0	0	0	0	0
Other						
Conditional Loans	0	0	0	0	0	0
Private Loans	0	0	0	0	0	0
Other Loans	0	0	0	0	0	0
Outside Scholarships	0	0	0	0	0	0
Other Agency Assistance	0	0	0	0	0	0
Total	0	0	0	0	0	0

[<<Prev] [Next>>] [✓ Save]

This folder is up to date. 🔲 Connecte

Submitting the Unit Record Report

When all edits and discrepancies have been addressed, you will be asked to review your Summary Reports before submitting the URR.

To submit your URR, click on the "Click to Continue" link from the "Edits" page.

You have an opportunity here to review any differences between your URR data and Portal records for State Need Grant, College Bound Scholarship, and Passport to College. If you find additional differences here, you can edit the records by clicking "Return to the Edit List." If there are significant differences, you may be asked to explain the discrepancies before your report is finalized by Council staff.

If the discrepancy is related to an SSN mismatch that originates as an error in the Final Interim Report or the Passport to College Portal record, the discrepancy cannot be corrected from the institution side of the Portal. To make WSAC staff aware of and correct this issue, click the "Send an Email" button to send a secure email to the Unit Record Report Team.

If all edits and discrepancies on these tabs have been addressed, click the "Click to Continue" button.

The next screen opens a copy of the pre-submission, preliminary Program Totals Report. We recommend that you review the current year data to determine if any programs are missing or if unusual patterns are present in your totals comparisons. Please contact

Council staff to discuss your options if that is the case. If everything appears reasonable, click the "Click to Continue" button.

Submit Unit Record Data	2014-2015	(Name of Institution here)	▼	In Progress

We recommend that you review the Program Totals Report, **below**, to do an overall assessment of your **current** data to identify if there are any programs missing or unusual patterns present in your totals comparisons. Contact WSAC staff for further advice if you find that to be the case. If everything appears reasonable, proceed to submission. **Click to Continue** → Return to the Edit List

☑ Uploaded by Ann Voyles on 8/12/2015   **Create a PDF of this page for your records**

Spokane Falls Community College Need-Based Financial Aid Recipient Totals and Non-Need Based Federal Loan Recipient Totals

Financial Aid Type	2011-2012 Amount	2012-2013 Amount	2013-2014 Amount	2014-2015 Amount	%Change Current vs Previous	2011-2012 Recipients	2012-2013 Recipients	2013-2014 Recipients	2014-2015 Recipients	% Change Current vs Previous
					Federal					

After reviewing the 2014-15 information in the "Programs Total Report," you have an opportunity to review the "Demographic Report" before submitting your report. If all data appears reasonable, click "Submit Your Unit Record Report."

	2014-2015	(Name of Institution here)	▼	In Progress

After all edits and differences have been addressed, and your Program Totals Report appears reasonable, click submit: ☑ **Submit Your Unit Record Report**   Return to the Edit List

You may download the URR summary analysis reports at any time. The Profile Reports will be produced in January. WSAC will notify institutions when the Profile Reports are available for download.

The following reports present a summary analysis of the Unit Record data for your institution:

Program Totals Report	Details the total number of all reported students and aid amounts for the last four years.
Demographic Distribution Reports	Shows student demographic changes for all reported students over the last four years.
SNG, College Bound & Passport Differences	Show differences between Unit Record data and WSAC Payments and/or Interim Reporting.

Profile Reports - These reports allow your institution to compare the assistance your students have received from these programs to all institutions in Washington state and also to all institutions in your institutions sector.
The comparison reports for this year will be available in January 2016. To view previous year comparison reports, select a previous year from the options shown above..

- Need-Based Aid Recipients
- State Work Study Recipients
- State Need Grant Recipients
- College Bound Scholarship Recipients

A pop-up window will appear at the top of your browser. If you wish to continue, click "OK." After the URR has been submitted, changes cannot be made to the data without contacting Council staff.

The page at portaldev says: ✕

Once submitted you will no longer be able to update this report. Do you wish to continue?

OK   Cancel

If your data was submitted successfully, you will see the following message. Council staff will receive an email message that you have submitted your URR. If you need to make any changes to the data after submission, contact Council staff at unitrecord@wsac.wa.gov.

Reports Available After Submission

We recommend that you make copies of your Program Totals Report and the Demographic Distribution Reports once you have submitted your final URR. Should there be changes to these reports once Council staff complete their review, you will be notified of the changes. You can also review previous year Profile reports at this time.

Updated Profile Reports Available in January 2016

Updated Profile Reports that include 2014-15 comparison information of your institution's data to all institutions in your sector as well as to all institutions in the state will be available in January 2016. Institutions will receive an email announcement when the reports are available.

Prior to January 2016, Profile Reports are available with comparison information for the previous three years and they can be downloaded and printed in PDF at any time. To view these Profile Reports, click the drop down box and select the appropriate academic year as shown in the screenshot example:

APPENDIX A: NEED-BASED AND NON-NEED BASED PROGRAM RECIPIENTS TO REPORT

Note: The aid types below are listed in the same order as the File Format shown in Appendix B.

Are aid types need-based or not?	**Need-Based FAFSA or WASFA data required**	**Need-Based FAFSA or WASFA data optional**	**Non-Need Based Federal Loans**	**Non-Need Based Other Programs**
What recipients should be reported?	**Report all recipients**	**Report all recipients**	**Report all recipients**	**Only report recipients who are also need-based recipients**
Should FAFSA or WASFA data be submitted?	**Yes**	**Yes, if FAFSA or WASFA data is available**	**No, unless need-based aid is also reported**	**Yes, if FAFSA or WASFA data is available**
Name of Program or Aid Type				
Federal Pell Grant	X			
Federal SEOG	X			
Federal TEACH Grant		X		
Federal Nursing Scholarships		X		
Federal Work Study	X			
Federal Perkins Loan	X			
Federal Nursing Health Loans		X		
Federal Direct Subsidized Loans	X			
Federal Direct Unsubsidized Loans			X	
Federal Parent PLUS Loans			X	
Federal Grad PLUS Loans			X	
State Need Grant	X			
College Bound Scholarship	X			
Passport to College Scholarship	X			
GET Ready for Math Science		X		
Opportunity Scholarship		X		
SBCTC Opportunity Grant		X		
Other State Funded Gift Assistance		X		

Are aid types need-based or not?	Need-Based FAFSA or WASFA data required	Need-Based FAFSA or WASFA data optional	Non-Need Based Federal Loans	Non-Need Based Other Programs
What students should be reported?	Report all recipients	Report all recipients	Report all recipients	Only report recipients who are also need-based recipients
Should FAFSA or WASFA data be submitted?	Yes	Yes, if FAFSA or WASFA data is available	No, unless need-based aid is also reported	Yes, if FAFSA or WASFA data is available
Name of Program or Aid Type				
On Campus State Work Study	X			
Off Campus State Work Study	X			
WorkForce Training Funds		X		
Need Based Institutional Gift Aid		X		
Non-Need Based Institutional Gift Aid				X
Institutional Employment		X		
Institutional Loans				X
Conditional Loans				X
Private Loans				X
Other Loans				X
Outside Scholarships				X
Other Agency Assistance				X

APPENDIX B: RECORD LAYOUT

The following shows field header names, valid inputs, remarks, and changes. A CSV file layout with headers is available on the Council website at: www.wsac.wa.gov/unit-record. Field names are hyperlinked to the corresponding field names in Chapter 2 (Data Definitions).

Field/Column Header Name	Valid Inputs	Remarks	Changes?
SSN	Numbers, with or without hyphens, no spaces	Required for all recipients. Nine-digit SSN. Include leading zeros, if necessary, to fill all nine digits. **For students reported in the Final Interim Report:** Report the same number that was reported in the Final Interim Report. **For students not reported in the Final Interim Report:** Report the same number used in your institutional reporting.	Yes
InstitutionStudentID	Any characters (up to 50)	Unique identifier for this student (SID) at your school. Public baccalaureate institutions should use the nine-character PCHEES Student ID as the first nine characters. CTCs should use the nine-character, college-assigned SID. Optional for private institutions. May be left blank by privates.	No
LastName	Any characters (up to 100)	Required for all recipients. If a student only has a first name, report that name as first name and last name.	No
FirstName	Any characters (up to 50)	Required for all recipients. If a student only has a last name, report that name as first name and last name.	No
MiddleName	Any characters (up to 50)	Optional, but provide if available – even if only the initial.	No

Field/Column Header Name	Valid Inputs	Remarks	Changes?
DateOfBirth	Most standard US database date-only outputs are supported e.g.: • 12/1/1987 • Dec 10 1990 • 12 Aug 1994 • 'April 1, 1992' • '1 May, 1990'	Required field if reporting FAFSA-based or WASFA aid types; otherwise optional and may be left blank. Standard US dates. Two digit years will be accepted, but four digit years are preferred. If commas are included in the dates, enclose the data in quotes.	No
Gender	'1' or 'Male' '2' or 'Female' '3' or 'Unknown'	Required for all recipients.	No
IsStateResident	'y' or 'true' 'n' or 'false'	Required for all recipients.	No
YearInSchool	'1' or 'Freshman/1st Year' '2' or 'Sophomore/ 2nd Year' '3' or 'Junior/3rd Year' 4' or 'Senior/4th Year' '5' or Unclassified/5th Year' '6' or 'Graduate' '7' or 'Professional' '8' or 'Other'	Required for all recipients. Report the status as of the beginning of the term of the recipient's last financial aid disbursement for the 2014-15 year.	Yes
IsOfHispanicOrigin	'y' or 'true' 'n' or 'false' blank if not reported	Report data if available. Leave blank only if information is not available.	No
IsRaceAmericanIndianAlaskaNative	'y' or 'true' 'n' or 'false' blank if not reported	Report data if available. Leave blank only if information is not available. Race may be reported as 'y' or 'true' in one or more race category.	No
IsRaceAsian	'y' or 'true' 'n' or 'false' blank if not reported	Report data if available. Leave blank only if information is not available. Race may be reported as 'y' or 'true' in one or more race category.	No

Field/Column Header Name	Valid Inputs	Remarks	Changes?
IsRaceBlackAfricanAmerican	'y' or 'true' 'n' or 'false' blank if not reported	Report data if available. Leave blank only if information is not available. Race may be reported as 'y' or 'true' in one or more race category.	No
IsRaceNativeHawaiianPacificIslander	'y' or 'true' 'n' or 'false' blank if not reported	Report data if available. Leave blank only if information is not available. Race may be reported as 'y' or 'true' in one or more race category.	No
IsRaceWhite	'y' or 'true' 'n' or 'false' blank if not reported	Report data if available. Leave blank only if information is not available. Race may be reported as 'y' or 'true' in one or more race category.	No
IsRaceOther	'y' or 'true' 'n' or 'false' blank if not reported	Report data if available. Leave blank only if information is not available. Race may be reported as 'y' or 'true' in one or more race category.	No
MaritalStatus	'1' or 'Unmarried' '2' or 'Married' '3' or 'Separated'	Required for all need-based aid recipients with a FAFSA or WASFA on file. May be left blank if FAFSA or WASFA data is not available.	No
IsDependent	'y' or 'true' 'n' or 'false'	Required for all need-based aid recipients with a FAFSA or WASFA on file. May be left blank if FAFSA or WASFA data is not available.	No
FamilySize	Integer > 0 1 to 20	Required for all need-based aid recipients with a FAFSA or WASFA on file. May be left blank if FAFSA or WASFA data is not available.	No

Field/Column Header Name	Valid Inputs	Remarks	Changes?
NumberInCollege	Integer > 0 1 to 20	Required for all need-based aid recipients with a FAFSA or WASFA on file. May be left blank if FAFSA or WASFA data is not available.	No
FamilyIncome	Integer between -300000 and 600000	Required for all need-based aid recipients with a FAFSA or WASFA on file. Leave blank if FAFSA or WASFA data is not available.	Yes
CostOfAttendance	Integer 0 to 250000	Required for all need-based aid recipients with a FAFSA or WASFA on file. May be left blank if FAFSA or WASFA data is not available.	Yes
ExpectedFamilyContribution	Integer 0 to 250000	Required for all need-based aid recipients with a FAFSA or WASFA on file. Leave blank if FAFSA or WASFA data is not available.	Yes
NeedDuration	Integer 1 to 12	Number of months. Required for all need-based aid recipients with a FAFSA or WASFA on file. Leave blank if FAFSA or WASFA data is not available.	No
NeedAmount	Non-negative Integer 0 to 250000	Required for all need-based aid recipients with a FAFSA or WASFA on file. Leave blank if FAFSA or WASFA data is not available.	Yes

Enrollment Status and Payments by Term Section

The following set of fields appears five (5) times in in the sample csv. File with 'TERM' in the column header name being replaced in turn by 'Summer1', 'Fall', 'Winter', 'Spring', and 'Summer2'. For example, TERMEnrollmentStatus becomes FallEnrollmentStatus for the Fall Enrollment. All of these fields are required for each student reported.

Field/Column Header Name	Valid Inputs	Remarks	Changes?
*TERM*EnrollmentStatus	'0' or 'Not enrolled' '1' or 'Full time' '2' or 'Half time' '3' or '3/4 time' '5' or '< Half Time'	Required for all recipients for each of the five terms. If the institution does not have that term (e.g., winter for semester institutions), report as '0'. Same reporting as for CSAW.	No
*TERM*FederalPellGrant	Non-negative Integer 0 to 5730	Need-based (FAFSA data required). Report all recipients.	Yes
*TERM*FederalSEOG	Non-negative Integer 0 to 6000	Need-based (FAFSA data required). Report all recipients.	No
*TERM*FederalTEACHGrant	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*FederalNursingScholarships	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*FederalWorkStudy	Non-negative Integer 0 to 99999	Need-based (FAFSA data required). Report all recipients.	No
*TERM*FederalPerkinsLoan	Non-negative Integer 0 to 8500	Need-based (FAFSA data required). Report all recipients.	No
*TERM*FederalNursingHealthLoans	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*FederalDirectSubsidizedLoans	Non-negative Integer 0 to 20000	Need-based (FAFSA data required). Report all recipients.	Yes
*TERM*FederalDirectUnsubsidizedLoans	Non-negative Integer 0 to 90000	Non-need based federal loans. Report all recipients.	Yes
*TERM*FederalParentPLUSLoans	Non-negative Integer 0 to 99999	Non-need based federal loans. Report all recipients.	No

Field/Column Header Name	Valid Inputs	Remarks	Changes?
*TERM*FederalGradPLUSLoans	Non-negative Integer 0 to 99999	Non-need based federal loans. Report all recipients.	No
*TERM*StateNeedGrant	Non-negative Integer 0 to 17000	Need-based (FAFSA or WASFA data required). Report all recipients.	No
*TERM*CollegeBoundScholarship	Non-negative Integer 0 to 18000	Need-based (FAFSA data required). Report all recipients.	No
*TERM*PassporttoCollegeScholarship	Non-negative Integer 0 to 8000	Need-based (FAFSA or WASFA data required). Report all recipients.	No
*TERM*GETReadyforMathScience	Non-negative Integer 0 to 17000	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*OpportunityScholarship	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*SBCTCOpportunityGrant	Non-negative Integer 0 to 10000	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*OtherStateFundedGiftAssistance	Non-negative Integer 0 to 99999	Need-based (FAFSA or WASFA data optional). Report all recipients.	No
*TERM*OnCampusStateWorkStudy	Non-negative Integer 0 to 99999	Need-based (FAFSA or WASFA data required). Report all recipients.	No
*TERM*OffCampusStateWorkStudy	Non-negative Integer 0 to 99999	Need-Based (FAFSA or WASFA data required). Report all recipients.	No
*TERM*WorkForceTrainingFunds	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*NeedBasedInstitutionalGiftAid	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*NonNeedBasedInstitutionalGiftAid	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
*TERM*InstitutionalEmployment	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No

Field/Column Header Name	Valid Inputs	Remarks	Changes?
*TERM*InstitutionalLoans	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
*TERM*ConditionalLoans	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
*TERM*PrivateLoans	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
*TERM*OtherLoans	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
*TERM*OutsideScholarships	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
*TERM*OtherAgencyAssistance	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No

APPENDIX C: SYSTEM EDITS

Errors that prevent File Upload and Import

- File is not in CSV format (or is otherwise unreadable).

- File Header row is missing.

- File Header row is missing some of the column headings:
    - Headings must be spelled correctly without extra punctuation or spaces.
    - Headings can be in any order.
    - Any character casing in the headings will be accepted.

- File Header has 'extra' columns (i.e., columns not in the file specifications).

- SSN is duplicated on multiple rows.

- Institution Student ID is not blank and is duplicated on multiple rows.

- Data rows do not have the same number of columns as the header row.

- Required fields are missing values:
    - SSN
    - LastName
    - FirstName
    - Gender
    - IsStateResident
    - YearInSchool
    - Enrollment Status (for all five terms)
    - Financial Aid Received (for all five terms for all programs)

- Numeric columns do not contain valid numbers (numbers in URR are always integers).

- Selection columns (e.g., marital status, enrollment status, year in school) do not contain valid selections.

- Boolean (yes/no) columns do not contain valid codes.

- Date fields do not contain valid dates (e.g., '2004-0101' or '12/31/2014'). If commas are included in the dates, enclose the data in quotes.

Detailed Data Edit Errors

Edit	Overrideable
College Bound Scholarship Award Differs from Final Interim Report	X
College Bound Scholarship Award Not Found In WSAC Interim Report	X
College Bound Scholarship Recipient Not A State Resident	
Cost Of Attendance Is Required For FAFSA-Based and WASFA Aid Types	
Cost Of Attendance Minus EFC Does Not Equal Need	X
Cost Of Attendance Outside Expected Range	X
Date Of Birth Is Required For FAFSA-Based and WASFA Aid Types	
Date Of Birth Outside Expected Range	X
Dependent Student Minimum Family Size Must Be At Least 2	X
Duration Of Need Must Be In The Range Of 1 To 12 Months	X
Expected Family Contribution Is Required For FAFSA-Based and WASFA Aid Types	
Expected Family Contribution Outside Expected Range	X
Family Income Is Required For FAFSA-Based and WASFA Aid Types	
Family Income, Need Amount, Expected Family Contribution, And Need Duration Must All Be Present Or All Blank	
Family Income Outside Expected Range	X
Family Size Is Required For FAFSA-Based and WASFA Aid Types	
Family Size Outside Expected Range 1-20	X
Federal GradPLUS Loan Recipient Must Be Reported As Graduate Student	
Federal ParentPLUS Loan Recipient Cannot Be Reported As Graduate Student	X
Is Dependent Is Required For FAFSA-Based and WASFA Aid Types	
Marital Status Is Required For FAFSA-Based and WASFA Aid Types	
Married Student Minimum Family Size Must Be At Least 2	X
Need Amount Cannot Exceed Cost Of Attendance	X
Need Amount Is Required For FAFSA-Based and WASFA Aid Types	
Need Amount Reported For Need Based Aid Recipient Is Outside Expected Range	
Need Duration Is Required For FAFSA-Based and WASFA Aid Types	
Number In College Cannot Be Greater Than Family Size	
Number In College Is Required For FAFSA-Based and WASFA Aid Types	
Number In College Outside Expected Range 1-20	X
Passport To College Scholarship Award Differs from WSAC Records	X
Passport To College Scholarship Award Not Found in WSAC Records	X
SSN Does Not Appear To Be a Valid Number	X

Edit	Overrideable
State Need Grant Award Differs from Final Interim Report	X
State Need Grant Award Not Found In WSAC Interim Report	X
State Need Grant Recipient Not A State Resident	
State Work Study Not A State Resident	
Student Not Enrolled	X
Total Aid Reported Is Zero	
Total College Bound Scholarship Outside Expected Range	X
Total Conditional Loans Outside Expected Range	X
Total Federal Direct Subsidized Loans Outside Expected Range	X
Total Federal Direct Unsubsidized Loans Outside Expected Range	X
Total Federal GradPLUS Loans Outside Expected Range	X
Total Federal Nursing Health Loans Outside Expected Range	X
Total Federal Nursing Scholarships Outside Expected Range	X
Total Federal ParentPLUS Loans Outside Expected Range	X
Total Federal PELL Grant Outside Expected Range	X
Total Federal Perkins Loans Outside Expected Range	X
Total Federal SEOG Outside Expected Range	X
Total Federal TEACH Grant Outside Expected Range	X
Total Federal Work Study Outside Expected Range	X
Total GET Ready For Math Science Outside Expected Range	X
Total Institutional Employment Outside Expected Range	X
Total Institutional Loans Outside Expected Range	X
Total Need-Based Institutional Gift Aid Outside Expected Range	X
Total Non-Need Based Institutional Gift Aid Outside Expected Range	X
Total Opportunity Scholarship Outside Expected Range	X
Total Other Agency Assistance Outside Expected Range	X
Total Other Loans Outside Expected Range	X
Total Other State Funded Gift Assistance Outside Expected Range	X
Total Outside Scholarships Outside Expected Range	X
Total Passport To College Scholarship Outside Expected Range	X
Total Private Loans Outside Expected Range	X
Total State Need Grant Outside Expected Range	X
Total State Work Study Outside Expected Range	X
Total WorkForce Training Funds Outside Expected Range	X
Total SBCTC Opportunity Grant Outside Expected Range	X

APPENDIX D: QUICK LOOK-UP BY FINANCIAL AID PROGRAM

Financial Aid Program	Unit Record Report Field Name
3.5% or 4% waivers	NeedBasedInstitutionalGiftAid
Aerospace Loan Program (ALP)	OtherLoans
Alternative Routes to Teaching Certification	ConditionalLoans
American Indian Endowed Scholarship	OtherStateFundedGiftAssistance
AmeriCorp	OtherAgencyAssistance
Athletic waiver	NeedBasedInstitutionalGiftAid or NonNeedBasedInstitutionalGiftAid
Basic Food Employment & Training (BFE&T)	WorkForceTrainingFunds
Bureau for Indian Affairs (BIA) Scholarship	OtherAgencyAssistance
Canadian, Micronesian, or Alaska Student Loans	OtherLoans
CBS	College Bound Scholarship
Chapters 31 and 33 veterans' benefits	OtherAgencyAssistance
College Bound Scholarship	CollegeBoundScholarship
College Success Foundation Opportunity Scholarship	OpportunityScholarship
Company scholarships	OutsideScholarships
Conditional awards in special education	ConditionalLoans
Dependent Child Care	StateNeedGrant
Early Achievers Opportunity Grant	OtherStateFundedGiftAssistance
Employer funded tuition assistance	OutsideScholarships
Federal Grad PLUS Loans	FederalGradPLUSLoans
Federal Direct Subsidized Loans	FederalDirectSubsidizedLoans
Federal Direct Unsubsidized Loans	FederalDirectUnsubsidizedLoans
Federal Nursing Student Loan	FederalNursingHealthLoans
Federal nursing and other health professional training scholarships and grants	FederalNursingScholarships
Federal Parent PLUS Loans	FederalParentPLUSLoans
Federal Pell Grant	FederalPellGrant
Federal Perkins Loans	FederalPerkinsLoans
Federal scholarships for TRIO students	OtherAgencyAssistance
Federal SEOG	FederalSEOG
Federal Subsidized Stafford Loans	FederalDirectSubsidizedLoans
Federal Supplemental Educational Opportunity Grant	FederalSEOG
Federal Unsubsidized Stafford Loans	FederalDirectUnsubsidizedLoans
Federal Work Study	FederalWorkStudy
Federal TEACH Grant	FederalTEACHGrant
Future Teachers Conditional Scholarships	ConditionalLoans
GEAR UP	OtherStateFundedGiftAssistance
GET Ready for Math & Science	GETReadyforMathScience
Global Opportunity Grant (UW only)	OtherStateFundedGiftAssistance
Governors' Scholarship (from CSF)	OutsideScholarships
Grad PLUS Loans	FederalGradPLUSLoans
Graduate Tuition Waivers	NeedBasedInstitutionalGiftAid or NonNeedBasedInstitutionalGiftAid

Financial Aid Program	Unit Record Report Field Name
Health professions student loan funds	FederalNursingHealthLoans
Institutional aid fund (public institutions only)	NeedBasedInstitutionalGiftAid or NonNeedBasedInstitutionalGiftAid
Institutional aid fund disbursed as work	InstitutionalEmployment
Institutional grants and scholarships	NeedBasedInstitutionalGiftAid or NonNeedBasedInstitutionalGiftAid
Institutional loans	InstitutionalLoans
Leadership 1000 Scholarship (from CSF)	OutsideScholarships
L&I assistance	OtherAgencyAssistance
National Merit Scholarships	OutsideScholarships
Need-based institutional gift aid	NeedBasedInstitutionalGiftAid
Need-based tuition & fee waiver	NeedBasedInstitutionalGiftAid
Non-need based institutional gift aid	NonNeedBasedInstitutionalGiftAid
Non-need based tuition & fee waiver	NonNeedBasedInstitutionalGiftAid
Non-work study institutional & off-campus employment	InstitutionalEmployment
Nonresident enrollment incentive waiver	NeedBasedInstitutionalGiftAid or NonNeedBasedInstitutionalGiftAid
Off-Campus State Work Study	OffCampusStateWorkStudy
On-Campus State Work Study	OnCampusStateWorkStudy
Opportunity Grant (from SBCTC)	SBCTCOpportunityGrant
Opportunity Scholarship (from CSF)	OpportunityScholarship
Organizational scholarships	OutsideScholarships
Other agency assistance	OtherAgencyAssistance
Other conditional loans not reported elsewhere	ConditionalLoans
Other loans not reported elsewhere	OtherLoans
Other state scholarships (i.e., Oregon)	OutsideScholarships
Other state-funded gift assistance	OtherStateFundedGiftAssistance
Outside scholarships	OutsideScholarships
Passport to College Scholarship	PassporttoCollegeScholarship
Parent PLUS Loans	FederalParentPLUSLoan
Pell Grant	FederalPellGrant
Perkins Loan	FederalPerkinsLoan
PLUS Loans	FederalGradPLUSLoan or FederalParentPLUSLoan
PREP loans	PrivateLoans
Private loans	PrivateLoans
Private scholarships	OutsideScholarships
Robert C. Byrd Honors Scholarship	OutsideScholarships
ROTC Scholarships	OtherAgencyAssistance
SBCTC Opportunity Grant	SBCTCOpportunityGrant
SEOG	FederalSEOG
Service club scholarships	OutsideScholarships
Services for the Blind assistance	OtherAgencyAssistance

Financial Aid Program	Unit Record Report Field Name
SNG	StateNeedGrant
Stafford Loans (subsidized)	FederalDirectSubsidizedLoans
Stafford Loans (unsubsidized)	FederalDirectUnsubsidizedLoans
State Need Grant	StateNeedGrant
State Work Study	OnCampusStateWorkStudy or OffCampusStateWorkStudy
State Work Study off-campus	OffCampusStateWorkStudy
State Work Study on-campus	OnCampusStateWorkStudy
Subsidized Stafford Loans	FederalDirectSubsidizedLoans
Supplemental Educational Opportunity Grant	FederalSEOG
SWS (off-campus)	OffCampusStateWorkStudy
SWS (on-campus)	OnCampusStateWorkStudy
TEACH Grant	FederalTEACHGrant
Tuition & fee waiver (need-based)	NeedBasedInstitutionalGiftAid
Tuition & fee waiver (non-need based)	NonNeedBasedInstitutionalGiftAid
Unsubsidized Stafford Loans	FederalDirectUnsubsidizedLoans
Veterans' benefits	OtherAgencyAssistance
Vocational Rehabilitation assistance	OtherAgencyAssistance
Washington Award for Vocational Excellence (WAVE)	OtherStateFundedGiftAssistance
Washington College Bound Scholarship	CollegeBoundScholarship
Washington Scholars	OtherStateFundedGiftAssistance
Washington State Achievers Scholarship	OutsideScholarships
Washington State Opportunity Scholarship (from CSF)	OpportunityScholarship
Washington State Need Grant	StateNeedGrant
Western Undergraduate Exchange Waiver (WUE)	NeedBasedInstitutionalGiftAid or NonNeedBasedInstitutionalGiftAid
Work-based Learning Tuition Assistance Funds	WorkForceTrainingFunds
Worker Retraining	WorkForceTrainingFunds
WorkFirst Work Study	InstitutionalEmployment
Workforce Investment Act assistance	OtherAgencyAssistance
Workforce Training Program	WorkForce TrainingFunds

APPENDIX E: QUICK LOOK-UP BY UNIT RECORD REPORT FIELD NAME

Unit Record Report Field Name	Financial Aid Programs
CollegeBoundScholarship	CBS
	College Bound Scholarship
	Washington College Bound Scholarship
ConditionalLoans	Alternative Routes to Teaching Certification
	Conditional awards in special education
	Future Teachers Conditional Scholarship
	Other conditional loans not reported elsewhere
FederalGradPLUSLoans	Federal Grad PLUS Loans
	Grad PLUS Loans
	PLUS Loans
FederalNursingHealthLoans	Federal Nursing Student Loan
	Health professions student loan funds
FederalNursingScholarships	Federal nursing and other health professional training scholarships and grants
FederalParentPLUSLoans	Federal Parent PLUS Loans
	Parent PLUS Loans
	PLUS Loans
FederalPellGrant	Federal Pell Grant
	Pell Grant
FederalPerkinsLoan	Federal Perkins Loan
	Perkins Loan
FederalSEOG	Federal SEOG
	Federal Supplemental Educational Opportunity Grant
	SEOG
	Supplemental Educational Opportunity Grant
FederalDirectSubsidizedLoans	Federal Subsidized Stafford Loans
	Federal Direct Subsidized Loans
	Stafford Loans (subsidized)
	Subsidized Stafford Loans
FederalTEACHGrant	Federal TEACH Grant
	TEACH Grant
FederalDirectUnsubsidizedLoans	Federal Unsubsidized Stafford Loans
	Federal Direct Unsubsidized Loans
	Stafford loans (unsubsidized)
	Unsubsidized Stafford loans
FederalWorkStudy	Federal Work Study
GETReadyforMathScience	GET Ready for Math and Science
InstitutionalEmployment	Non-work study institutional & off-campus employment
	WorkFirst Work Study
	Institutional aid fund disbursed as work
InstitutionalLoans	Institutional loans

Unit Record Report Field Name	Financial Aid Programs
NeedBasedInstitutionalGiftAid	3.5% or 4% waivers
	Athletic waivers (need-based)
	Graduate tuition waivers (need-based)
	Institutional aid fund (need-based)
	Institutional grants and scholarships (need-based)
	Need-based institutional gift aid
	Need-based tuition & fee waivers
	Nonresident enrollment incentive waiver (need-based)
	Tuition & fee waivers (need-based)
	Western Undergraduate Exchange Waiver (need-based)
NonNeedBasedInstitutionalGiftAid	Athletic waivers (non-need based)
	Graduate tuition waivers (non-need based)
	Institutional aid fund (non-need based)
	Institutional grants and scholarships (non-need based)
	Non-need based institutional gift aid
	Non-need based tuition & fee waiver
	Nonresident enrollment incentive waiver (non-need based)
	Tuition & fee waiver (non-need based)
	Western Undergraduate Exchange Waiver (non-need based)
OffCampusStateWorkStudy	Off-campus State Work Study
	State Work Study off-campus
	SWS (off-campus)
OnCampusStateWorkStudy	On-campus State Work Study
	State Work Study on-campus
	SWS (on-campus)
OpportunityScholarship	College Success Foundation Opportunity Scholarship
	Opportunity Scholarship (from CSF)
	Washington State Opportunity Scholarship (from CSF)
OtherAgencyAssistance	AmeriCorp
	Bureau of Indian Affairs (BIA) Scholarship
	Chapters 31 and 33 veterans' benefits
	Federal scholarships for TRIO students
	L&I assistance
	Other agency assistance
	ROTC Scholarships
	Services for the Blind assistance
	Veterans' benefits
	Vocational Rehabilitation assistance
	Workforce Investment Act assistance

Unit Record Report Field Name	Financial Aid Programs
OtherLoans	Aerospace Loan Program (ALP)
	Canadian, Micronesian or Alaska Student Loans
	Other loans not reported elsewhere
OtherStateFundedGiftAssistance	American Indian Endowed Scholarship
	Early Achievers Opportunity Grant
	GEAR UP
	Global Opportunity Grant (UW only)
	Other state funded gift assistance
	Washington Award for Vocational Excellence (WAVE)
	Washington Scholars
OutsideScholarships	Company scholarships
	Employer funded tuition assistance
	Governors' Scholarship (from CSF)
	Leadership 1000 Scholarship (from CSF)
	National Merit Scholarships
	Organizational scholarships
	Other state scholarships (i.e., Oregon)
	Outside scholarships
	Private scholarships
	Robert C. Byrd Honors Scholarship
	Service club scholarships
	Washington State Achievers Scholarship
PassporttoCollegeScholarship	Passport To College Scholarship
PrivateLoans	Private loans
	PREP Loans
SBCTCOpportunityGrant	Opportunity Grant (from SBCTC)
	SBCTC Opportunity Grant
StateNeedGrant	Dependent Child Care
	SNG
	State Need Grant
	Washington State Need Grant
WorkForceTrainingFunds	Basic Food Employment & Training (BFE&T)
	Work-based learning tuition assistance funds
	Worker Retraining
	WorkForce Training Program