



# Unit Record Report

*Submitting the 2014-15 Report Via the Portal  
and CTC FAS Update*

*Webinar Training Presentation  
August 25, 2015*





# Council and SBCTC Staff on the Webinar

- Steve Thorndill, Associate Director, Training & Compliance
- Becky Phillips, FAS Product Manager, SBCTC-IT
- Ann Voyles, Program Associate
- Kara Larson, Data Analyst



# Purpose of the Unit Record Report

- Provide institutional reports and profiles
- Assess the needs of students
- Guide legislative and other policy decisions
- Inform changes to state aid programs
- Minimize ad hoc data requests to institutions



# Timeline

**URR Manual available electronically:**

**<http://www.wsac.wa.gov/unit-record>**

**August 17:** Unit Record Report (URR) application opens

**October 9:** Finalized report due

**October/November:** WSAC analysis

**December:** Reports to policy makers

**January 2016:** Institutional profiles available



# Manual Overview

- **Introduction**
  - Overview, purpose, changes, and timeline
- **Chapter 1 – General Instructions**
- **Chapter 2 – Data Definitions**
- **Chapter 3 – Reporting Application User’s Guide**
- **Appendices**



# Manual Overview

- **Appendices**

A – Need-Based and Non-Need Based Program Recipients to Report

B – Record Layout – File Format and Valid Inputs

C – System Edits that Prevent File Upload & Import

D – Quick Lookup by Financial Aid Program

E – Quick Lookup by Unit Record Report Field Name



# Portal CSV File Submission

- **Building a CSV file for submission**
  - Report only students who received financial aid based on the 2014-15 FAFSA year
  - Report files in CSV format with a header row
  - Review the field definitions in Chapter 2 of the Manual and the record layout in Appendices B and C to determine valid field content

- **SM9738J** – CTC Unit Record job has been modified to produce a CSV file
  - File includes students who received financial aid during the 2014-15 year
  - File includes header row
- SBCTC-IT will be working with WSAC to ensure that file is correct format and passes portal file edits





# Reporting Requirements

- **Determine which students to report**
  - Need-Based Recipients – 2014-15 FAFSA required
  - Need-Based Aid Recipients – other programs where FAFSA data may or may not be available
  - Non-Need Based Federal Loan Recipients (i.e., Federal Direct Unsubsidized Loans, Federal Parent PLUS Loans, and Federal Grad PLUS Loans)

*Appendix A in the Manual details these categories*

- **SM9738J selects:**
  - 2014-15 Need-Based recipients
  - 2014-15 Non-Need Based Federal Loan Recipients



# Reporting Requirements

- **Need-Based Recipients**
  - Intent is to capture all financial aid disbursements in a Unit Record Report
  - Report this year all financial aid received based on filing of the 2014-15 FAFSA
  - Report on next year's URR all financial aid received based on the 2015-16 FAFSA



# Programs to Report

- **Need-Based Recipients – FAFSA fields required**
  - Federal Pell Grant
  - Federal SEOG
  - Federal Work Study
  - Federal Perkins Loan
  - Federal Direct Subsidized Loan
  - State Need Grant
  - College Bound Scholarship
  - Passport to College Scholarship
  - State Work Study (On- and Off-Campus)
  - Need-Based Institutional Gift Aid



# Programs to Report

## • Need-Based Recipients – Other Programs

- Federal TEACH Grant
- Federal Health Professional Scholarships & Grants
- Federal Health Professional Loans
- GET Ready for Math & Science
- Opportunity Scholarship
- SBCTC Opportunity Grant
- Other State Funded Assistance
- Worker Retraining Program Funds
- Need-Based Institutional Gift Aid
- Institutional Employment (if need based)

- Both Need-Based awards and Non-Need Based Federal Loans have separate Processing Table entries. All are on the CIS/WAT Processing Table.
- Check the SBCTC-IT URR documentation when available



# Basic Food Employment and Training (BFE&T or BFET)

- If your need-based recipients receive BFET funds and they are easily reportable from your system, include the amounts received for the same period of time reported on for your recipients.
- Should be reported as WorkForceTrainingFunds

- Enter your **BFET** award codes in the **WCC150-WKFORCET** entry on the CIS/WAT Processing Table.





# Programs to Report

- **Federal Non-Need Based Loan Recipients**
  - Federal Direct Unsubsidized Loan
  - Federal Parent PLUS Loan
  - Federal Grad PLUS Loan

*Note: The information reported will be minimal for Federal loan recipients who are not also receiving need-based assistance.*



# Changes for 2014-15 Portal

- **Refer to Page iii in the Manual**
- **Consistency with other WSAC Reporting**
  - SNG, CBS, and Passport funds reported will be compared with Final Interim Report and other Portal records by recipient.
  - Individual differences greater than \$10 will generate an overrideable error edit at file upload.



# Changes for 2014-15 Portal

- **WASFA Data in Absence of FAFSA**
  - Report WASFA data if FAFSA information is not available and the student received need-based assistance and only filed a WASFA.
  - This applies mainly to DREAMers who received SNG in 2014-15.

- DREAMers who received need based aid and only submitted WASFA ISIRS will be included.



# Changes for 2014-15 Portal

- **Field Rule Changes**
  - **SSN Field - Students Reported in Interim Report (IR)**
    - Must match IR data previously submitted or receive upload error
    - If missing from URR but reported in Interim Report, appears as difference in SNG/CBS/Passport Discrepancy Report
  - Order of preference
    - Social Security Number
    - Nine-digit tax identification number
    - WASFA applicant identification number



# Changes for 2014-15 Portal

- **Field Rule Changes, continued:**
  - **SSN Field - Students Not Reported in Interim Report**

Populate SSN field with nine-digit number used in your institutional reporting

- **Year In School**

**Code '8' or 'Other'** – Use to report need-based aid for Running Start students or other students who have not yet graduated from high school



# Changes for 2014-15 Portal

- **Valid Input Range Changes**

Category	Old Value	New Value
Family Income	-200000 to 500000	-300000 to 600000
Cost of Attendance	0 to 200000	0 to 250000
Expected Family Contribution	0 to 200000	0 to 250000
Need Amount	0 to 200000	0 to 250000
Federal Pell Grant	0 to 5650	0 to 5730
Federal Direct Subsidized Loans	0 to 17000	0 to 20000
Federal Direct Unsubsidized Loans	0 to 82000	0 to 90000



# Changes for 2014-15 Portal

- **Family Income**

- Report actual family income amounts even if higher or lower than the system edit amounts
- Indicate “actual income reported on FAFSA (or WASFA)” if an edit occurs

- **Need Amount**

Adjust any negative need amounts to zero. Should you not do this, WSAC will adjust all negatives to zero.





# Early Announcement – Changes considered for 2015-16 Unit Record Report

- **Reporting of tuition waiver dollars for SNG and CBS recipients**
  - Include full or partial tuition waivers
  - Cost of attendance to reflect tuition prior to application of waiver
  - Report waivers as a financial aid resource in Need-Based Institutional Gift Aid, or Non-Need Based Institutional Gift Aid
  - Not required until 2015-16 URR
  - Institutions are encouraged to report it this way in the 2014-15 URR, if possible



# Reporting Requirements

- **For all financial aid recipients reported**
  - Fields required:
    - SSN
    - First Name
    - Last Name
    - Gender
    - Is State Resident
    - Year In School
    - Financial Aid per term – even if ‘0’
    - Enrollment Status per term
  - Report Financial Aid for each of five terms
  - Report Enrollment Status for each of five terms
  - Report non-need based aid received for all need-based recipients



# Reporting Requirements

- **CSV file requires header row (sample is available)**
- **Financial aid reported for each of five terms:**
  - Summer 1 (used primarily for leader/header awards)
  - Fall
  - Winter (semester schools to report as zeros '0')
  - Spring
  - Summer 2 (used primarily for trailer awards)

- **SM9738J** selects:
  - Need-Based recipients
  - Non-Need Based Federal Loan Recipients
  - Will produce CSV file with required header
  - All 5 quarters are included in CSV file
    - Data from the appropriate quarter will be placed in appropriate location in CSV file



# Reporting Requirements

- **When to include summer aid in your reporting**
  - Review Chapter 2 of Manual for detailed information
  - Summer aid reported are amounts received based on 2014-15 FAFSA or WASFA
  - In general:
    - Leader/Header schools to report Summer 1 aid (Report Summer 2 as '0')
    - Trailer schools to report Summer 2 aid (Report Summer 1 as '0')
  - If recipient enrolled more than one “term” in same summer – Report total amount received and enrollment status as one enrollment term

- Included awards in **B451** will be placed in the Summer 1 location in the CSV file
- Included awards in **B455** will be placed in the Summer 2 location in the CSV file



# FAFSA Related Fields

- **Fields to also report for 2014-15 FAFSA & WASFA filers**
  - Marital Status
  - Is Dependent
  - Family Size
  - Number in College
  - Family Income
  - Expected Family Contribution (EFC)
  - Cost of Attendance (COA)
  - Need Duration
  - Need Amount

- This data will be included in the CSV file for FAFSA filers and for DREAMers receiving need based aid who submitted the WASFA.





# **SPECIAL NOTES ABOUT SELECTED FIELDS**



# Social Security Numbers

- Duplicates are not accepted
  - Files containing duplicate SSNs will not upload
- SSNs of State Need Grant and College Bound Scholarship recipients will be compared to the SSNs reported in the SNG/CBS July final Interim Report
- SSNs of Passport to College recipients will be compared to recipient Portal records
- Discrepancies will show on edit reports



## Year in School

'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.



## Year in School – Reminders

- Do not automatically use the Year in School reported on FAFSA or WASFA
- Report the highest Year in School for which the student attended when the student's financial aid was disbursed
- Code '8' or 'Other' – Use to report need-based aid for Running Start students or other students who have not yet graduated from high school

- Run **SM9146J** – Post SM Grade Level to FAID/Credit job prior to running **SM9738J**
- Correct value will be posted to the Year in School field on the FA Tab in FAM except:
  - Running Start students – will need to manually enter ‘8’ into the Year in School field on the FA Tab in FAM
- **SM9738J** will use the value posted to the Year In School field on the FA Tab in FAM



# Family Information

- **Family Size**

- Generally reported from the FAFSA or WASFA
- Must be 2 or higher for dependent students
- Must be 1 or higher for independent students

- **Number in College**

- Must be 1 or higher
- Cannot exceed the Family Size
- Parents' enrollment in college should not be included unless it was a professional judgment



# Family Income

- **Report the Family Income (taxable and untaxed) based on a review of the 2014-15 FAFSA or WASFA**
  - Often will be the 2013 income from FAFSA or WASFA
  - If a professional judgment decision was made, report that income
  - Report integers without dollar signs or cents (e.g., 44010 and -10123)
  - The only place in the file where negative numbers can be used

- If dependent, the parent's AGI and untaxed income is reported
- If independent, the student's AGI and untaxed income is reported
- Negative incomes will be reported





# Expected Family Contribution

- **Report the Expected Family Contribution (EFC)**
  - Often will be the Federal Methodology calculation produced by U.S. Department of Education based on the 2014-15 FAFSA, or WASFA
  - May be adjusted by professional judgment decisions
  - Should reflect the number of months reported in Need Duration



## Cost of Attendance

- Most campuses use several student budgets to reflect changes in living expenses
- Report the student budget amount related to Need Amount
- Should be based on the number of months reported in Need Duration



# Need Amount

## Cost of Attendance

- Expected Family Contribution

= Need Amount

- Base all three items on number of months reported in Need Duration
- For Need Amount, report the amount used in the disbursement of aid
- Report Need Amount as '0' or higher (do not report negative values)

- **SM9738** will generate an error message of 'Need Amount Invalid' if the Need Amount is not the Cost of Attendance minus the combined Student and Parent Contribution



## Need Duration

- Report Need Duration based on the number of months for which the Need Amount and Cost of Attendance were reported
- Normally report as integers from 1-12



# Term Enrollment Status

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 Time	9 - 11	225 - 299	'3' or '3/4 time'
Less Than Half-Time	Less than 6	Less than 150	'5' or '< Half time'



# Reporting Term Enrollment

## Approximate Term Date Ranges for Clock-Hour Institutions

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



# State Need Grant

- Report the final awards received by the student
- The Unit Record Reporting tool checks against SNG Final Interim Report – Critical
- Review the “SNG Students Not Reported” report to verify all SNG recipients and awards are correctly reported





# College Bound Scholarship

- Report the final awards received by the student
- The Unit Record Reporting tool checks against SNG Final Interim Report – Critical
- Review the “College Bound Scholarship Not Reported” report to verify College Bound recipients and awards are correctly reported



## State Work Study

- Separate on-campus & off-campus employment
- Report students' total gross earnings, including employer match or institutional share
- Include summer employment
- Report either:
  - Actual gross earnings based on monthly cut-off dates or institutional payroll dates
  - Average gross term earnings over the academic year for all terms student was enrolled at least half-time



# Institutional Gift Aid

- **Report Institutional Gift Aid as either:**
  - Need-Based Institutional Gift Aid – all institutional grants, scholarships, and/or waivers awarded solely or partially on a review of the 2014-15 FAFSA
  - Non-Need Based Institutional Gift Aid – all institutional grants, scholarships, and/or waivers awarded without regard to the FAFSA



## Other State Funded Gift Assistance

- **Report sources of state aid not reported elsewhere.**  
Examples include:
  - American Indian Endowed Scholarship
  - GEAR UP (include SETA, and GET funds for GEAR UP)
  - Washington Scholars
  - Washington Award for Vocational Excellence (WAVE)

- Complete list of the aid categories and corresponding Processing Table entry will be included in the SBCTC-IT Unit Record documentation
- Notice will be sent to **Dirfinaid** when the documentation is available and when the 2014-15 **SM9738J** is available



# EDITS



# Edits to Ensure Data Quality

- Edits help ensure data quality
- Edits are “softened” for students receiving only Non-Need Based Federal Loans
- FAFSA related edits also are “softened” for students not receiving FAFSA (or WASFA) required aid types



# Edits that Prevent File Upload

- **Refer to Appendix C (page 40) in the Manual**

Examples of errors that prevent upload

- Header row missing or invalid
- Duplicate SSNs
- Invalid codes
- Blanks reported in required fields

*Be sure to review all 12 items!*





# Non-Overrideable Edit Examples

- **Refer to Appendix C (page 41 - 42) in the Manual**
  - No financial aid reported
  - Non-resident with SNG or other state aid
  - Number in College greater than Family Size



# Overrideable Edit Examples

- **Refer to Appendix C (pages 41 - 42) – Field Content**
  - Need Amount is Zero with Need-Based Aid
    - Budget changed with dropped credits
  - Year in School for Aid Type (Federal Grad PLUS Loan)
    - Student graduated mid-year
  - Date of Birth outside of normal range
  - Cost of Attendance minus Expected Family Contribution (calculated by the edit program) does not equal Need Amount reported by college

- Edits in **SM9738J** mimic WSAC edits
- Students with errors on **SM9738** reports are included in the CSV file except:
  - Student's award amounts are zero
  - Student has awards that aren't entered in a CIS/WAT Processing Table entry
- 'C' report can optionally list students by error message or error messages by student



## Tips and Best Practices

- Upload your CSV file early – don't wait for the deadline!
- Review 2014-15 URR Manual and training materials, and test upload using the Portal training environment:

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

(Data entered is temporary; information clears overnight)

- Use URR informational reports to check for consistency & validity
- CTCs – Review SBCTC 2014-15 URR Manual when available
- Contact us with questions or problems not addressed in Manual

- **CTC URR Basic Steps**

- Reconcile awards with expenditure data
- Run job to post SMS Year in School to FA tab
- Run job to update academic hours on Academic tab
- Run job to update Residence status from SMS
- Run DataExpress procedure to determine if award code was used during 2014-15
- Update CIS/WAT Processing Table

- **CTC URR Basic Steps (continued)**
  - Run **SM9738J**
  - Review reports and correct errors
  - Run **SM9738J** in final mode to generate final reports and CSV file
  - Download CSV file to local network drive using **HPUX** screen **SM9724**
  - Upload CSV file to WSAC Portal



# USING THE WEB APPLICATION



# Logon to the Portal

## <https://fortress.wa.gov/wsac/portal/>

WASHINGTON STUDENT ACHIEVEMENT COUNCIL  
EDUCATION · OPPORTUNITY · RESULTS

email address      password ([forgot #?](#))      Login

**Middle/High School Staff**  
To nominate students for the Washington Scholars Award, [activate your account](#)  
[Enter College Bound applications](#) for students  
[Request](#) a GEAR UP account

**Financial Aid Administrators**  
[CSAW](#)  
[Unit Record](#)

**Students/Parents/Other**  
[Register](#) for a username and password  
[Apply](#) for the College Bound Scholarship  
[Register](#) as a Health Professional

**READY SET GRAD**      **theWashBoard.org**      **GET** Guaranteed Education Tuition™      **GEAR UP** WASHINGTON STATE      **College Bound Scholarship** WASHINGTON      **WASHINGTON** OPPORTUNITY PATHWAYS





# URR Portal Submission Tool

In the Programs menu, click on Unit Record.

The screenshot shows the top navigation bar of the WSAC portal. The 'Programs' menu is open, displaying a list of options: American Indian, College Bound, GEAR UP, SNG, Unit Record, WA Scholars, and WAVE. An orange arrow points to 'Unit Record'.

Home ▾  
Admin ▾ | Common ▾ | Programs ▾ | Utilities ▾

**Welcome to the WSAC portal.**  
This website is for use only by authorized WSAC staff, institution staff, employers, and students. This site is not for use by the general public.

- American Indian
- College Bound
- GEAR UP
- SNG
- Unit Record
- WA Scholars
- WAVE



# URR Portal Submission Tool

## 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

- The welcome screen will appear on your first login.
- From the welcome screen, click on “Next: Proceed to Upload.”
- If logging in after URR data has been entered, you will be taken directly to the current step: “Ready to Begin,” “In Progress,” or “Submitted.”




# Uploading Data From File

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

Or [Add Students Manually](#)

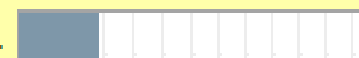
2

1

1. Browse to select a CSV File.

2. Upload.

processing...



510/2,214

A progress bar allows users to see how much of the file has been reviewed for upload errors.



# Uploading Data From File

Error message(s) appear if the file fails the upload process.

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

Row 79: Field 'LastName' is required **Field error**

**discard file** **Discard button**

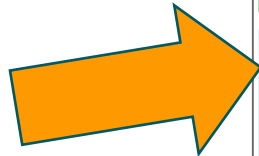
Discard the file, correct the error, and re-upload.



# Uploading Data From File

Once the file upload is complete, verify the total number of students and the number of students by year in school.

Proceed to Edits.



**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](#)

<b>Total Student Rows</b>	457
<b>Class Counts -</b>	
Freshman/1st Year	25
Sophomore/2nd Year	27
Junior/3rd Year	42
Senior/4th Year	191
Graduate	169
Other	3

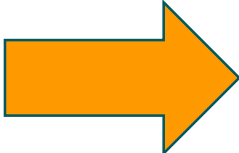


# Processing Edits

This may take a while. Edits can be fixed while the Portal reviews remaining records for edits. Periodically click “Refresh.”

processing...   
230/ 457

We're currently processing your edits. You may work on 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 - 4 of 4

<u>SSN</u>	<u>Student ID</u>	<u>Last</u>	<u>First</u>	<u>Middle</u>	<u>Error</u>	<u>Overridable</u>
<a href="#">999999559</a>	Stu0484	Smith	A		Student not Enrolled	Overrideable
<a href="#">999999560</a>	Stu0483	Johnson	D	D	College Bound Scholarship award not found in WSAC records	Overrideable



# Processing Edits

Filter by Edit Type or Sort by SSN, Student ID, Name, Error message, or Overrideable.

Last processed on 8/8/2013 8:30:56 AM

[download all edits into csv](#) [Reprocess Edits](#) [Delete Upload](#) [Add a new unit record to the report](#)

### Unit Record Edits

6 errors (5 overrideable, 1 overridden; 0 informational)

Filter by Edit Type  Show Informational  Overridden

<u>SSN</u>	<u>Student ID</u>	<u>Last</u>	<u>First</u>	<u>Middle</u>	<u>Error</u>	<u>Overrideable</u>
<a href="#">999999955</a>	STU0484	Smith	K		Date Of Birth outside expected range	Overridden
<a href="#">999999955</a>	STU0484	Smith	K		Student Id Number must be at least 9 characters for publics	Overrideable
<a href="#">999999955</a>	STU0484	Smith	K		Student not Enrolled	Overrideable
<a href="#">999999955</a>	STU0484	Smith	K		Total aid reported is zero	

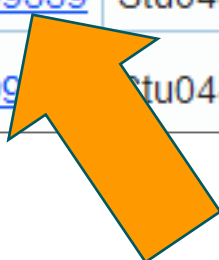


# Processing Edits

The file cannot be submitted until all Non-Overrideable edits are fixed, and all Overrideable edits are fixed or overridden with a reason.

To override or edit student data, click on student's SSN to open the record.

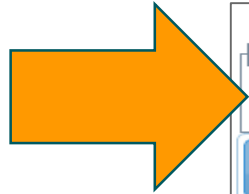
<u>SSN</u>	<u>Student ID</u>	<u>Last</u>	<u>First</u>	<u>Middle</u>	<u>Error</u>	<u>Overrideable</u>
<a href="#">999999559</a>	Stu0484	Smith	A		Student not Enrolled	Overrideable
<a href="#">999999</a>	Stu0483	Johnson	D	D	College Bound Scholarship award not found in WSAC records	Overrideable







# Processing Edits



999-99-9559      Smith, A      SID: Stu0484      [Add a new Unit Record](#)

**Errors**

Student not Enrolled      [+ Override](#)

---

**Student Demographics and Need**      **Student Aid**

SSN: 999999559      Institution Student Id: Stu0484      Marital Status: UnMarried

Last Name: Smith      First Name: A      Middle Name:

Date of Birth: 1/29/1987      Is Dependent: Yes / true      Year in School: Senior/4th Year

Gender: Female      Family Size: 5      # Family in College: 1

Is State Resident: Yes / true

**Need**

+ Cost of Attendance: 35352      Total Family Income: 7268

- Expected Family Contribution: 0      Need Duration (months): 9

= Need Amount: 35352

**Ethnicity/Race**

Is of Hispanic Origin: Yes / true      Is Native Hawaiian/Pacific Islander: No / false

Is Asian: Yes / true      Is White: Yes / true

Is Black/African American: No / false      Is Other Race: No / false

Is American Indian Alaska Native: No / false

<<Prev      Next>>      Save      Delete



# Processing Edits

Edit the data or override with a reason.

999-99-9559      Smith, A      SID: Stu0484      [Add a new Unit Record](#)

Errors

Student not Enrolled      + Override

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 Pell Grant	0	0	0	0	0	0
Federal SEOG	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 Nursing Scholarships	0	0	0	0	0	0
Federal Subsidized Stafford Loans	0	0	0	0	0	0
Federal Unsubsidized Stafford Loans	0	0	0	0	0	0
Federal TEACH Grant	0	0	0	0	0	0

<<Prev      Next>>      Save      Delete



# Processing Edits

1. If overriding, enter reason in the pop-up box and click “save.”
2. Hover mouse over the information icon to review the override reason.

The screenshot shows a student record for 'Smith, A' with SID: Stu0484. The record is currently 'Student not Enrolled'. An override has been applied, with the reason 'Aid paid for admissions and testing fee. Student ended up not attending.' The override was created by 'Allyson Burns' on 8/8/2013 at 9:05 AM. Below the record, there are tabs for 'Student Aid' and 'Financials and Need'. The 'Student Aid' section shows enrollment status and financial aid amounts for Summer 1, Fall, Winter, Spring, and Summer 2, with a total column.

	Summer 1	Fall	Winter	Spring	Summer 2	Total
Enrollment Status	Not enrolled	Not enrolled	Not enrolled	Not enrolled	Not enrolled	
Federal Pell Grant	0	0	0	0	0	0
Federal SEOG	0	0	0	0	0	0



# Student Aid Screen

All aid must be reported by term. If the term is not applicable, report “Not enrolled” and ‘0’ funding (typically).

	Summer 1	Fall	Winter	Spring	Summer 2
<b>Enrollment Status</b>	Not enrolled ▾	Not enrolled ▾	Not enrolled ▾	Not enrolled ▾	Not enrolled ▾

- Federal**
- Federal Pell Grant
- Federal SEOG
- Federal Work Study
- Federal Perkins Loan
- Federal Nursing Health Loans
- Federal Nursing Scholarships
- Federal Subsidized Stafford Loans
- Federal Unsubsidized Stafford Loans
- Federal TEACH Grant
- Federal Grad PLUS Loans
- Federal Parent PLUS Loans

- State**
- State Need Grant
- Opportunity Scholarship
- WorkForce Training Funds
- SBCTC Opportunity Grant
- Passport to College Scholarship
- College Bound Scholarship
- Other State Funded Gift Assistance
- On Campus State Work Study
- Off Campus State Work Study
- GET Ready for Math Science

- Institution / Other**
- Outside Scholarships
- Need Based Institutional Gift Aid
- Non-Need Based Institutional Gift Aid
- Institutional Employment
- Other Agency Assistance
- Other Loans
- Conditional Loans
- Private Loans
- Institutional Loans



# Checking for Missing Data Previously Reported in WSAC Records

Click “Show SNG/CBS/PTC discrepancies report” from the Edit page

Last processed on 6/16/2015 4:24:20 PM [download all edits into csv](#) [Reprocess Edits](#) [Delete Upload](#) [Add a new unit record to the report](#)

**Unit Record Edits** **52 errors** (52 overrideable - 52 overridden; 0 informational)   Show Informational  Overridden

All edits have been addressed [Click To Continue](#)

Showing results 1 - 10 of 52 [Show SNG/CBS/PTC discrepancies report](#)

SSN	Student ID	Last	First	Middle	Error	Overrideable
<a href="#">001176493</a>	30453420398	FREDLEY	MANDY		College Bound Scholarship Amount Differs From Interim Report (interim: 0; unit record: 1539)	Overridden
<a href="#">001176493</a>	30453420398	FREDLEY	MANDY		College Bound Scholarship amount not found in WSAC Interim Report	Overridden



# Checking for Missing Data Previously Reported in WSAC Records

Discrepancies already overridden are flagged with a 'Y' to differentiate those records from discrepancies not yet addressed


**SNG, CBS & Passport Variances Between Unit Record and WSAC Interim Report and/or Payment Records.**

State Need Grant   College Bound Scholarship   **Passport To College**

[Download differences to csv](#)

SSN	Last, First	SID	Passport Payments	Unit Record	Difference	Override Requested
539-17-0000	BRALEY, PORTIA	388383069		<u>\$1,500.00</u>	\$1,500.00	Y

1   next   3





# Checking for Missing Data Previously Reported in WSAC Records

If additional discrepancies exist, click “Download differences to .csv” to review a separate file and identify missing student records that must be added or corrected

**SNG, CBS & Passport Variances Between Unit Record and WSAC Interim Report and/or Payment Records.**

State Need Grant   College Bound Scholarship   **Passport To College**

Download differences to csv

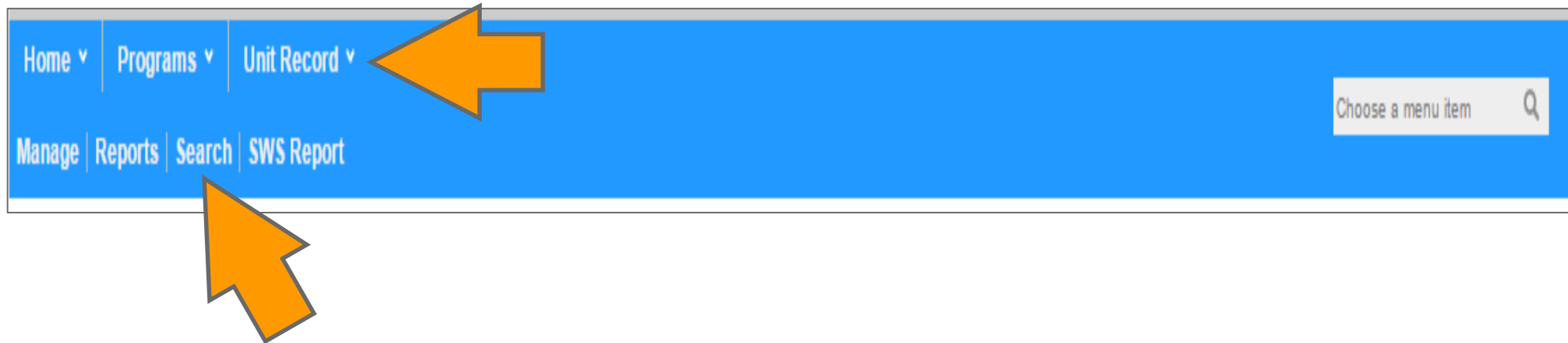
SSN	Last, First	SID	Passport Payments	Unit Record	Difference	Override Requested
539-17-0000	BRALEY, PORTIA	388383069		\$1,500.00	\$1,500.00	Y

1   next   3



# Adding Missing Data to Existing URR Upload Record

To add missing data to an existing record in your upload file, “Search” to locate and edit the student record







# Adding Data for Record Missing from URR Upload

To add a missing student record, click “Add a new unit record to the report” from the Edits page

Last processed on 5/21/2014 4:14:39 PM [download all edits into csv](#) [Reprocess Edits](#) [Delete Upload](#) [Add a new unit record to the report](#)

**Unit Record Edits** [refresh](#)

Showing results 1 - 10 of 11

<a href="#">SSN</a>	<a href="#">Student ID</a>	<a href="#">Last</a>	<a href="#">First</a>	<a href="#">Middle</a>	<a href="#">Error</a>	<a href="#">Overrideable</a>
<a href="#">465245253</a>	252142002	Fairlie	Laura	T.	College Bound Scholarship award not found in WSAC records	Overrideable
<a href="#">465245253</a>	252142002	Fairlie	Laura	T.	Federal Grad PLUS Loan recipient must be reported as graduate student	



# Adding Data for Record Missing from URR Upload

This will open a new, blank record. Complete the fields in the “Student Demographics and Need” and “Student Aid” tabs. Remember to “Save” your work

The screenshot shows a web form titled "New Unit Record" with two tabs: "Student Demographics and Need" (active) and "Student Aid". The form contains several input fields and dropdown menus. Three orange arrows point to the "Student Demographics and Need" tab, the "Student Aid" tab, and the "Save" button at the bottom right.

Student Demographics and Need		
SSN	Institution Student Id	Marital Status
Last Name	First Name	Middle Name
Date of Birth (mm/dd/yyyy)	Is Dependent	Year in School
Gender	Family Size	# Family in College
Is State Resident		

Need	
+ Cost of Attendance	Total Family Income
- Expected Family Contribution	Need Duration (months)
= Need Amount	

Ethnicity/Race	
Is of Hispanic Origin	Is Native Hawaiian/Pacific Islander
Is Asian	Is White
Is Black/African American	Is Other Race
Is American Indian Alaska Native	

Navigation: <<Prev, Next>>, Save



# Submitting the Report

When all errors have been fixed or overridden, click “Click to Continue” from the Edits page.

Last processed on 8/5/2015 8:52:17 AM [download all edits into csv](#) [Reprocess Edits](#) [Delete Upload](#) [Add a new unit record to the report](#)

### Unit Record Edits

**53 errors** (53 overrideable - 53 overridden; 0 informational) Filter by Edit Type

Show Informational  Overridden

**All edits have been addressed** [Click To Continue](#) →

Showing results 1 - 10 of 53 [Show SNG/CBS/PTC discrepancies report](#)

<u>SSN</u>	<u>Student ID</u>	<u>Last</u>	<u>First</u>	<u>Middle</u>	<u>Error</u>	<u>Overrideable</u>
<a href="#">002785973</a>	825428962	PETERDY	GERALDINE	A	College Bound Scholarship Amount Differs From Interim Report (interim: 0; unit record: 1200)	Overridden



# Submitting the Report

Note that SSN mismatches originating outside of URR require WSAC assistance. Press “Send an Email” to securely notify WSAC.

Press “Click to Continue,” or “Return to the Edit List” to make corrections.

Review the SNG, CBS & Passport differences below, then [Click to Continue](#) → [Return to the Edit List](#)

Edit or add student records if necessary. A 'Y' in the Override column denotes an addressed edit. You may be asked to explain significant discrepancies before your report is finalized by WSAC.

Discrepancies due to an SSN mismatch, originating in the Final Interim Report or Portal records instead of the URR, cannot be corrected by the institution without WSAC assistance. Click on the "Send an Email" button to correct the SSN: [Send an Email](#)

[State Need Grant](#) [College Bound Scholarship](#) [Passport To College](#)

No SNG Differences Found



# Submitting the Report

Review the preliminary Program Totals Report for missing information or unusual patterns. Press “Click to Continue”

Submit Unit Record Data  In Progress

2014-2015

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  on 8/13/2015 [Create a PDF of this page for your records](#)

**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										



# Submitting the Report

- Click “Submit Your Unit Record Report”

The screenshot shows a web interface for submitting a report. At the top, there is a dropdown menu for the year (2014-2015) and a dropdown for the institution name (labeled "(Name of Institution here)"). To the right, it says "In Progress". Below this, there is a section with the text: "After all edits and differences have been addressed, and your Program Totals Report appears reasonable, click submit: **Submit Your Unit Record Report**". A blue button with a checkmark and the text "Submit Your Unit Record Report" is highlighted with an orange arrow. To the right of this button is a link "Return to the Edit List". Below this, there is a paragraph: "You may download the URR summary analysis reports at any time. Reports will be produced in January. WSAC will notify institutions when the Profile Reports are available for download." Below this is a section titled "The following reports present a summary analysis of the Unit Record data for your institution:" with three links: "Program Totals Report", "Demographic Distribution Reports", and "SNG, College Bound & Passport Differences". Below these links is a section for "Profile Reports" with a list of categories: "Need-Based Aid Recipients", "State Work Study Recipients", "State Need Grant Recipients", and "College Bound Scholarship Recipients". A red text note says: "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..". A confirmation dialog box is overlaid on the bottom right, with the text: "The page at portaltraining says: Once submitted you will no longer be able to update this report. Do you wish to continue?". The dialog box has "OK" and "Cancel" buttons. An orange arrow points to the "OK" button.



# Before Exiting the URR Portal

1. Successful submission takes you to a Confirmation/Reports page.
2. Review and print available URR Summary Reports.

Unit Record Report -- Submitted  
2014-2015 Institution name here Submitted

**Your Unit Record data has been submitted to the Washington Student Achievement Council.**

- Uploaded by Ann Voyles on 8/12/2015
- Submitted by Ann Voyles on 8/12/2015

For questions or to unsubmit your Unit Record Report, contact the WSAC Unit Record staff at [UnitRecord@wsac.wa.gov](mailto:UnitRecord@wsac.wa.gov) or (360) 753-7851

**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

*WSAC Secure Portal*

Welcome (Portal user)

[Logout](#)



# Other URR Summary Reports

Home ▾ | Programs ▾ | Unit Record ▾

Choose a menu item 🔍

Reports | Search

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





## Where to go for help

- For help with setup in FAM, running any of the jobs, correcting errors and downloading the CSV file, contact SBCTC-IT Customer Support.

[support@sbctc.edu](mailto:support@sbctc.edu)

425-803-9721



## Where to go for help

- Review the 2014-15 URR Manual, available online at:  
<http://www.wsac.wa.gov/unit-record>
- Contact Washington Student Achievement Council staff at:  
[unitrecord@wsac.wa.gov](mailto:unitrecord@wsac.wa.gov)

<b>Ann Voyles</b>	<b>Kara Larson</b>	<b>Steve Thorndill</b>
360-753-7843 <a href="mailto:annv@wsac.wa.gov">annv@wsac.wa.gov</a>	360-753-7820 <a href="mailto:karal@wsac.wa.gov">karal@wsac.wa.gov</a>	360-753-7851 <a href="mailto:stevet@wsac.wa.gov">stevet@wsac.wa.gov</a>