



Unit Record Report

*Submitting the 2015-16 Report Via the Portal
and SBCTC ctcLink Update*

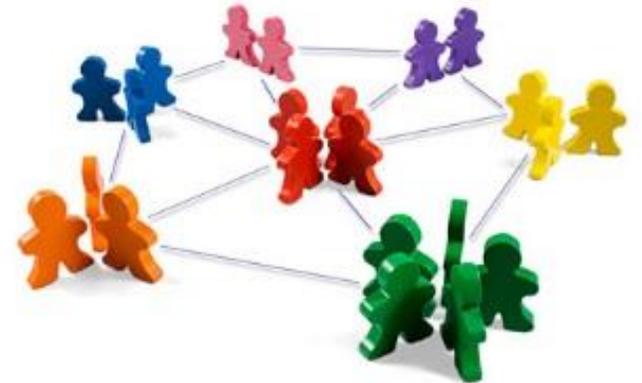
*Webinar Training Presentation
August 29, 2016*





Council and SBCTC Staff on the Webinar

- Steve Thorndill, Associate Director, Training & Compliance, WSAC
- Kim Wasierski, ctcLink Project Financial Aid Lead, SBCTC
 - Jodi Sharp, ERP Functional Analyst, SBCTC
- Ann Voyles, Program Associate, WSAC





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 15: Unit Record Report (URR) application opens

October 14: Finalized report due

October/November: WSAC analysis

December: Reports to policy makers

January 2017: 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 2015-16 FAFSA (or WASFA) 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

- State FA Reporting Component

- Enter Institution & Aid Year
- Enter designated file path
- Select Report Type = XLS
- Click RUN button

ctcLink

Favorites Main Menu > Financial Aid > CTC Custom > CTC Reports > State FA Reporting

Run Control ID: FA_URR [Report Manager](#) [Process Monitor](#) [Run](#)

State FA Report

*Institution	<input type="text" value="WA171"/>	Spokane CC
*Aid Year	<input type="text" value="2016"/>	2015-2016 Financial Aid Year
File Path	<input type="text" value="/u01/app/psrepo/Interface/CSTRANSFER/WA171/SNG2016/"/>	
Report Type	<input type="text" value="XLS"/>	

[Save](#) [Add](#) [Update/Display](#)

- Select 'Unit Record Report'
- Click OK button
- Report file is generated in CSV format with header row - which includes students who received awards for the 2015-16 aid year.

The screenshot shows the 'Process Scheduler Request' dialog box in the ctcLink application. The breadcrumb trail is: Favorites > Main Menu > Financial Aid > CTC Custom > CTC Reports > State FA Reporting. The dialog title is 'Process Scheduler Request'. It displays 'User ID CIBER_FUNCTIONAL' and 'Run Control ID FA_URR'. Below this, there are input fields for 'Server Name', 'Run Date' (08/21/2016), 'Recurrence', 'Run Time' (9:41:14PM), and 'Time Zone'. A 'Reset to Current Date/Time' button is highlighted in yellow. The 'Process List' table is as follows:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	State Need Grant Report	CTC_SNGRP_AE	Application Engine	Web	TXT	Distribution
<input checked="" type="checkbox"/>	Unit Record Report	CTC_URR_AE	Application Engine	Web	TXT	Distribution

At the bottom, the 'OK' button is circled in red, and the 'Cancel' button is also visible.



Reporting Requirements

- **Determine which students to report**
 - Need-Based Recipients – 2015-16 FAFSA (or WASFA) required
 - Need-Based Aid Recipients – other programs where FAFSA (or WASFA) 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

- **The ctcLink Unit Record Report selects:**
 - Need-Based Recipients
 - 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 2015-16 FAFSA (or WASFA)
 - Report on next year's URR all financial aid received based on the 2016-17 FAFSA (or WASFA)



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

*** FAFSA or WASFA required**

**** FAFSA or WASFA required; DACA students must have a valid work authorization**



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)



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 for your recipients.
- Should be reported as WorkForceTrainingFunds



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.

- **Global Setup for the ctcLink Unit Record Report:**
 - Ethnicity Category
 - Award Category
 - Need-Based FAFSA/WASFA data Required or Optional
 - Non-Need Based Loans or Other
 - Award maximum amounts

- **Institution-based Configuration for the ctcLink Unit Record Report:**
 - URR Ethnicity Category linked to PeopleSoft Ethnic Group values
 - Award Category
 - Linked to FA Item Type and Award Status (example: Offered, Accepted, or Disbursed)



Changes for 2015-16 Portal

- **Refer to Page iii in the Manual**
- **Consistency with other WSAC Reporting**
 - SNG Unserved on the Final Interim Report will be compared with URR records. A list of Unserved students without URR records will be produced for review, and addition of record(s) or explanatory comment.
 - A positive enrollment status is required for each term that aid is reported, except for certain work programs. This is an overrideable edit.
- **Passport to College and the CSF Opportunity Scholarship** – These are non-overrideable edits to confirm Washington state resident status.



Valid Input Ranges

- One Change for 2015-16

Category	Old Value	New Value
Family Income	-300000 to 600000	No change
Cost of Attendance	0 to 250000	No change
Expected Family Contribution	0 to 250000	No change
Need Amount	0 to 250000	No change
Federal Pell Grant	0 to 5730	0 to 5775
Federal Direct Subsidized Loans	0 to 20000	No change
Federal Direct Unsubsidized Loans	0 to 90000	No change



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)





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 2015-16 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')
 - Clock hour schools may report aid for both summer terms
 - If recipient enrolled more than one "term" in same summer – Report total amount received and enrollment status as one enrollment term



FAFSA & WASFA Related Fields

- **Fields to also report for 2015-16 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



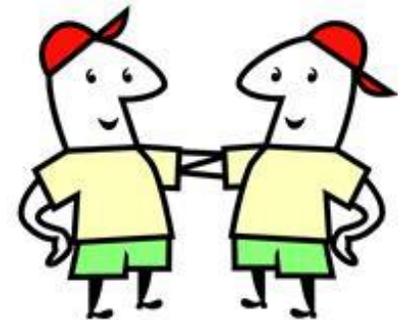


SPECIAL NOTES ABOUT SELECTED FIELDS



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 2015-16 year.



Year in School – Things to Consider



- 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

- **Year In School**

- Value is reported as of the beginning of the term for the student's last financial aid disbursement for the year.
- Combination of earned units (between the ranges indicated in the URR Manual), whether or not students are matriculated into a BAA/BAS program, and NSLDS Loan Year on FA Term.



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 2015-16 FAFSA or WASFA**
 - Often will be the 2014 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

- **Family Income**

- Income value pulled from the State Need Grant Eligible Data page.
- If the student is Dependent, only the parent(s)'s taxable and non-taxable income are included.
- If the student is Independent, both the student's and spouse's taxable and non-taxable income are included.
- Negative family income values will be included, if applicable.



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 2015-16 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

$$\begin{aligned} & - \text{Expected Family Contribution} \\ & = \text{Need Amount} \end{aligned}$$



- 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)



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	12.0 or more	300 or more *	'1' or 'Full time'
Half-Time	6.0 - 8.9	150 - 224	'2' or 'Half time'
Three-Quarter Time	9.0 - 11.9	225 - 299	'3' or '3/4 time'
Less Than Half-Time	3.0 - 5.9	75 - 149	'5' or '< Half time'

*Typically clock hour term awards are for full-time enrollment status, except that the final term may be paid for part-time enrollment status.

- **Term Enrollment Status**

- Enrollment statuses are pulled from the FA Load field on the FA Term page.
- FA Term values are translated and included in the CSV data file.
 - F = 'Full time'
 - T = '3/4 time'
 - H = 'Half time'
 - L = '< Half Time'
 - N = 'Not enrolled'



Reporting Term Enrollment

Approximate Term Date Ranges for Clock-Hour Institutions

Term	From	To
Summer 1	July 1, 2015	September 11, 2015
Fall	September 12, 2015	November 22, 2015
Winter	November 23, 2015	February 5, 2016
Spring	February 6, 2016	April 18, 2016
Summer 2	April 19, 2016	June 30, 2016



State Need Grant, College Bound Scholarship, and Passport to College

- Report the final awards received by the student
- The Unit Record Reporting tool checks against Final Interim Report – Critical
- Review the “SNG, CBS, & Passport Differences Report” to verify all SNG, CBS, and Passport recipients and awards are correctly reported



Reporting of tuition waiver dollars for SNG and CBS recipients

- To the extent possible, institutions are encouraged to report full or partial tuition waivers received by their needy students
 - This helps state data show more accurately all forms of assistance that needy students are receiving
 - If tuition & fee waivers are reported, be sure to also include tuition & fee amounts in each student's Cost of Attendance to reflect tuition prior to application of waiver
 - Report waivers as a financial aid resource in the appropriate field:
 - Need-Based Institutional Gift Aid
 - Non-Need Based Institutional Gift Aid



State Work Study

- Report on-campus & off-campus employment separately
- 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 2015-16 FAFSA or WASFA
 - Non-Need Based Institutional Gift Aid – all institutional grants, scholarships, and/or waivers awarded without regard to the FAFSA or WASFA



Other State Funded Gift Assistance

- **Report sources of state aid not reported elsewhere.**
Examples include:
 - American Indian Endowed Scholarship
 - Washington Scholars
 - Washington Award for Vocational Excellence (WAVE)

- **Instructions and details for setting up and running the ctcLink Unit Record Report will be available for FirstLink Colleges.**



EDITS





Edits to Ensure Data Quality

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



Edits that Prevent File Upload

- **Refer to Appendix C (page 43) 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 44 - 45) in the Manual**
 - Total Aid Reported is Zero
 - Non-resident with SNG or other state aid
 - Number in College greater than Family Size



Overrideable Edit Examples

- **Refer to Appendix C (pages 44 – 45) – 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

- **Edit reports are still in development.**
- **The current design includes 2 reports:**
 - **Student-detailed report – Provides details of student records included in the CSV data file. Also will include a list of all award summary totals and student counts.**
 - **Error Details and Summary report – Provides a list of students with error messages. Also will include a list of errors encountered and a total count of each message.**
- **Edits are closely aligned with WSAC's edits.**



Tips and Best Practices

- Upload your CSV file early – don't wait for the deadline!
- Review 2015-16 URR Manual and training materials, and test upload using the Portal training environment:

<https://fortress.wa.gov/wsac/portals/training/>

(Data entered is temporary; information clears overnight)

- Use URR informational reports to check for consistency & validity
- ctcLink – Review Unit Record Report business process documentation when available.
- Contact us with questions or problems not addressed in Manual

- **ctcLink Unit Record Report Basic Steps**
 - Reconcile awards
 - Add or update Unit Record Report Configuration tables
 - Run Unit Record Report
 - Can be run as many times as needed
 - CSV data file is generated each time for review
 - Review reports and correct errors
 - Rerun Unit Record Report
 - Download CSV data file to desktop or local network drive
 - Upload CSV file to WSAC Portal



USING THE WEB APPLICATION





Logon to the Portal

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

WSAC Portal - Login

portal/

WASHINGTON STUDENT ACHIEVEMENT COUNCIL
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[Enter College Bound applications](#) for students
[Request](#) a GEAR UP account
[View FAFSA Completion statistics](#) for public school students

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

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 **COLLEGE BOUND SCHOLARSHIP** **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 bar is blue and contains the following items: Home ▾, Admin ▾, Common ▾, Programs ▾, and Utilities ▾. The 'Programs' menu is open, displaying a dark grey dropdown list with the following options: American Indian, College Bound, GEAR UP, SNG, Unit Record, WA Scholars, and WAVE. A large orange arrow points from the 'Programs' menu item in the navigation bar down to the dropdown list. A second large orange arrow points from the right side of the dropdown list to the 'Unit Record' option.



URR Portal Submission Tool

Welcome to the Unit Record Report 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.

The screenshot shows a red error message box with the text: "This file cannot be saved due to errors. Please correct your file and resubmit." Below this, a specific error is listed: "Row 79: Field 'LastName' is required". A blue button labeled "discard file" is visible at the bottom left. Three orange callout arrows point to these elements: one to the "Row #" text, one to the "Field error" text, and one to the "discard file" button.

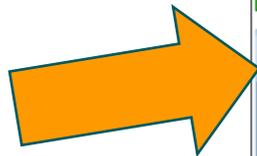
Discard the file, correct the error, and re-upload.



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.

Total Student Rows	457
Class Counts -	
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

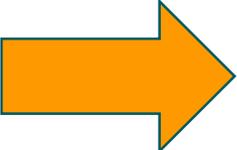
We're currently processing your edits. You may work on resolving edits as we process them. You can also leave this page or log out and come back when processing is complete.

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>
999999559	Stu0484	Smith	A		Student not Enrolled	Overrideable
999999560	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 status.

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

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



Processing Edits

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

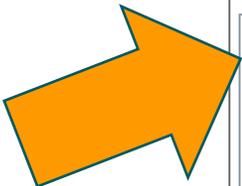
To override or edit student data, click on student's SSN to open the record.

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





Processing Edits



101-11-1111 Adrenaline, Rush A [Add a new Unit Record](#)

Errors

- Fall term Enrollment Status cannot be Not Enrolled when Fall term aid has been reported [+ Override](#)
- State Need Grant Amount Differs From Interim Report (interim: 0; unit record: 659) [+ Override](#)
- State Need Grant award not found in WSAC Interim Report [+ Override](#)

Student Demographics and Need **Student Aid**

SSN or WASFA Id	<input type="text" value="101-11-1111"/>	Institution Student Id	<input type="text"/>	Marital Status	<input type="text" value="Separated"/>
Last Name	<input type="text" value="Adrenaline"/>	First Name	<input type="text" value="Rush"/>	Middle Name	<input type="text" value="A"/>
Date of Birth	<input type="text" value="2/15/1985"/>	Is Dependent	<input type="text" value="No / false"/>	Year in School	<input type="text" value="Graduate"/>
Gender	<input type="text" value="Male"/>	Family Size	<input type="text" value="1"/>	# Family in College	<input type="text" value="1"/>
		Is State Resident	<input type="text" value="Yes / true"/>		

Need

+ Cost of Attendance	<input type="text" value="39392"/>	Total Family Income	<input type="text" value="22122"/>
- Expected Family Contribution	<input type="text" value="0"/>	Need Duration (months)	<input type="text" value="9"/>
= Need Amount	<input type="text" value="39392"/>		

Ethnicity/Race

[<<Prev](#) [Next>>](#) [Save](#) [Delete](#) [Return to the Edit List](#)



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
Enrollment Status	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



Processing Edits

Edit the data or override with a reason.

101-11-1111 Adrenaline, Rush A [Add a new Unit Record](#)

Errors

- Fall term Enrollment Status cannot be Not Enrolled when Fall term aid has been reported [+ Override](#)
- State Need Grant Amount Differs From Interim Report (Interim: 0; unit record: 659) [+ Override](#)
- State Need Grant award not found in WSAC Interim Report [+ Override](#)

Student Demographics and Need **Student Aid**

	Summer 1	Fall	Winter	Spring	Summer 2	Total
Enrollment Status	Not enrolled	Not enrolled	Full time	Full time	Full time	
Federal Pell Grant	0	Not enrolled	0	2865	0	5730
Federal SEOG	0	Full time		0	0	500
Federal TEACH Grant	0	Half time		0	0	0
Federal Nursing Scholarships	0	3/4 time		0	0	0
Federal Work Study	0	< Half Time		0	0	0
Federal Perkins Loan	0		0	0	0	0
Federal Nursing Health Loans	0		0	0	0	0
Federal Direct Subsidized Loans	0	1750	0	1750	0	3500
Federal Direct Unsubsidized Loans	0	0		0	0	0
Federal Parent PLUS Loans	0	0		0	0	0
Federal Grad PLUS Loans	0	5000		0	0	5000
State Need Grant	0	659	0		0	659
College Bound Scholarship	0				0	0

[<<Prev](#) [Next>>](#) [Save](#) [Delete](#) [Return to the Edit List](#)



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 displays a student record for 'Smith, A' (SID: Stu0484) with an override status of 'Student not Enrolled'. The override was created by 'Allyson Burns' on 8/8/2013 at 9:05 AM. A pop-up window titled 'Override Unit Record Edit Error' is open, showing the edit type and a text area for the override comment. An orange arrow labeled '1' points to the 'Save' button in the pop-up. A yellow tooltip, circled in red, contains the reason for the override: 'Aid paid for admissions and testing fee. Student ended up not attending.' An orange arrow labeled '2' points to the information icon next to the override text.

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



Checking for Missing Data Previously Reported in WSAC Records

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

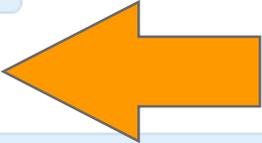
Last processed on 6/24/2016 12:09:58 PM [download all edits into csv](#) [Reprocess Edits](#) [Delete Upload](#) [Add a new unit record to the report](#)

Unit Record Edits

44 errors (44 overrideable - 44 overridden; 0 informational) [Show Informational](#)

Overridden

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

Showing results 1 - 10 of 44 [Show SNG/CBS/PTC differences report](#) 

SSN	Student ID	Last	First	Middle	Error	Overrideable
222222223		Aardvark	Andrus		State Need Grant award 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 Differences Between Unit Record and WSAC Interim Report and/or Payment Records.

State Need Grant

College Bound Scholarship

Passport To College

Missing SNG Unserved Students

Download differences to csv

<u>SSN</u>	<u>Last, First</u>	<u>SID</u>	<u>Passport Payments</u>	<u>Unit Record</u>	<u>Difference</u>	<u>Override Requested</u>
444-44-4445	Actor, Shakespeare J			<u>\$3,000.00</u>	\$3,000.00	Y





Checking for Missing Data Previously Reported in WSAC Records

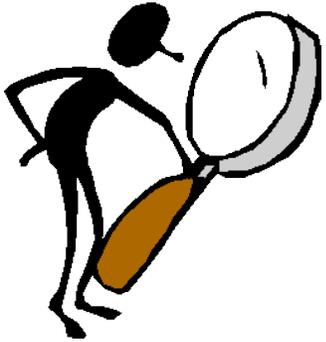
If additional discrepancies exist, click “Download differences to .csv” to review a separate file and identify missing student records that must be added or corrected

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

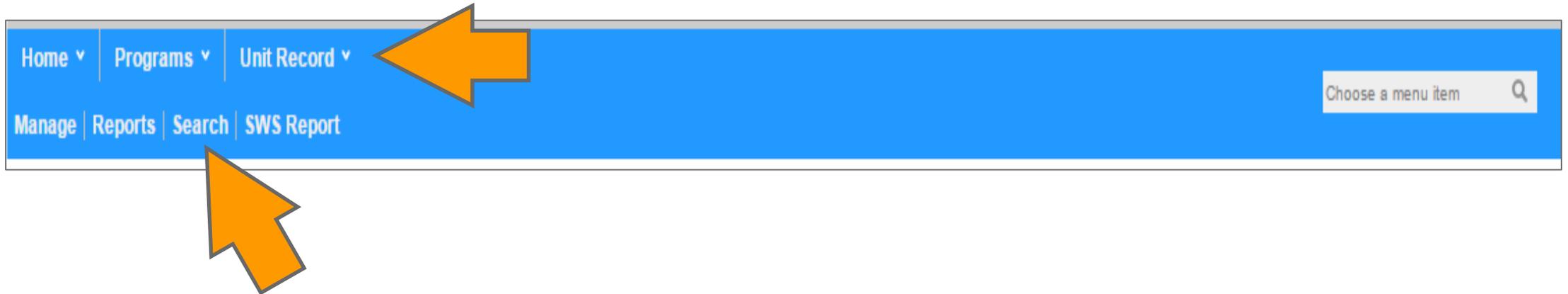
State Need Grant	College Bound Scholarship	Passport To College	Missing SNG Unserved Students			
Download differences to csv						
SSN	Last, First	SID	Passport Payments	Unit Record	Difference	Override Requested
444-44-4445	Actor, Shakespeare J			<u>\$3,000.00</u>	\$3,000.00	Y



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 Missing Record to URR Upload File

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

Last processed on 6/24/2016 12:09:58 PM [download all edits into csv](#) [Reprocess Edits](#) [Delete Upload](#) [Add a new unit record to the report](#)

Unit Record Edits **52 errors** (50 overrideable - 0 overridden; 0 informational)

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

SSN	Student ID	Last	First	Middle	Error	Overrideable
101111111		Adrenaline	Rush	A	Federal Grad PLUS Loan recipient must be reported as graduate student	
101111111		Adrenaline	Rush	A	State Need Grant Amount Differs From Interim Report (interim: 0; unit record: 659)	Overrideable
101111111		Adrenaline	Rush	A	State Need Grant award not found in WSAC Interim Report	Overrideable



Adding Missing Record to 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 buttons: <<Prev, Next>>, Save



Missing SNG Unserved Students Report – NEW!

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

Missing SNG Unserved Students

Download the .csv file for this list of Missing SNG Unserved Students for 2015-16 and review for accuracy. If the terms and enrollment statuses are correct, and the student(s) did not receive any need-based aid or federal loans, please indicate "Yes" in the appropriate column of the .csv download file. If corrections need to be made to the enrollment terms or enrollment statuses, please describe the correction in the "Comments" section. Return the notated .csv file to WSAC as a secure Portal email attachment.

[Download unserveds to csv](#)

SSN	Last, First	SID	Unserved Summer1	Unserved Fall	Unserved Winter	Unserved Spring	Unserved Summer2
██████	██████					Full time	Full time
██████	██████					Full time	3/4 time
██████	██████						Full time
██████	██████				Full time	Full time	Full time



Example of completed Missing SNG Unserved Report

Complete these columns

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
	InstitutionName	AcademicYear	Ssn	SID	FirstName	Middle Initial	LastName	UnservedEnrollmentSummer1	UnservedEnrollmentFall	UnservedEnrollmentWinter	UnservedEnrollmentSpring	UnservedEnrollmentSummer2	Indicate_Yes_if_All_Terms_OK	Comments_Section
1	Any Institution	2015-2016	111111113		Andy	A	Apple			Full time	Full time	Full time		Not enrolled summer2
2	Any Institution	2015-2016	222222223		Andrus		Aarvark					Full time	Yes	
3	Any Institution	2015-2016	202222222		Knowles	A	Aptitude				Full time	3/4 time		Not enrolled any of the terms indicated
4	Any Institution	2015-2016	303333333		Sidney	E	Albatross		Full time	Full time	Full time		Yes	
5														
6														
7														
8	Any Institution	2015-2016	101111111		Rush	A	Adrenaline				Full time	3/4 time		Record added to URR (rec'd Pell) *

* Record for Rush A. Adrenaline, highlighted in light green, added to URR – The notation placed in “Comments” is shown here for discussion purposes only; a missing record added to the URR will cause the record to clear from this difference report.



Return completed “Missing SNG Unserved” Report as a secure Portal email attachment to WSAC

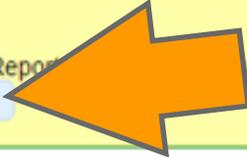
Review the SNG, CBS & Passport differences below, then

[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, 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

Missing SNG Unserved Students

Download the .csv file for this list of Missing SNG Unserved Students for 2015-16 and review for accuracy. If the terms and enrollment statuses are correct, and the student(s) did not receive any need-based aid or federal loans, please indicate "Yes" in the appropriate column of the .csv download file. If corrections need to be made to the enrollment terms or enrollment statuses, please describe the correction in the "Comments" section. Return the notated .csv file to WSAC as a secure Portal email attachment.

[Download unserveds to csv](#)

SSN	Last, First	SID	Unserved Summer1	Unserved Fall	Unserved Winter	Unserved Spring	Unserved Summer2
██████	██████					Full time	Full time
██████	██████					Full time	3/4 time
██████	██████						Full time
██████	██████				Full time	Full time	Full time



Submitting the Report

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

Press “Return to the Edit List” or “Search” to make additional corrections, or “Click to Continue” if all errors have been fixed or overridden.

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](#) [Identifying SNG Unserved Students](#)

No Passport Differences Found



Submitting the Report

Review the preliminary Program Totals Report for missing information or unusual patterns.

Press “Click to Continue”

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](#)

Note! Preliminary Institutional Totals Report includes need based aid; Non-essential data will be removed from Final Institutional Totals Report after all URRs are finalized..

Uploaded by on 6/24/2016 [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	2012-2013 Amount	2013-2014 Amount	2014-2015 Amount	2015-2016 Amount	%Change Current vs Previous	2012-2013 Recipients	2013-2014 Recipients	2014-2015 Recipients	2015-2016 Recipients	% Change Current vs Previous
Federal										



Submitting the Report

- Click “Submit Your Unit Record Report”

2015-2016 (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. We will provide these reports to all 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 2017. 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

The page at portaltraining says:

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



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 2015-2016 Institution name here Submitted

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

Uploaded by	User name	6/24/2016
Submitted by	here	6/24/2016

For questions or to unsubmit your Unit Record Report, contact the WSAC Unit Record staff at 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.

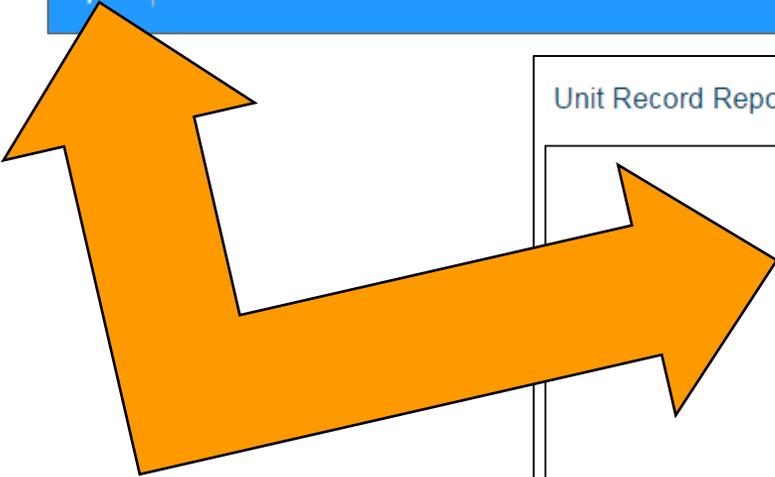
Profile Reports - These reports allow your institution to compare the assistance your students have received from these programs to all institutions in Washington state and also to all institutions in your institutions sector.
The comparison reports for this year will be available in January 2017. To 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

WSAC Secure Portal
Welcome (Portal user)
[Logout](#)



Other URR Summary Reports



Home ▾ | Programs ▾ | Unit Record ▾

Choose a menu item 🔍

Reports | Search

Unit Record Reports

2015-2016

(Name of Institution here) ▾

Submitted

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.

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The comparison reports for this year will be available in January 2017. 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



For questions or help with setting up or running the ctcLink Unit Record Report, contact the ERP FA Support Team by filing a ticket via the Service Desk.

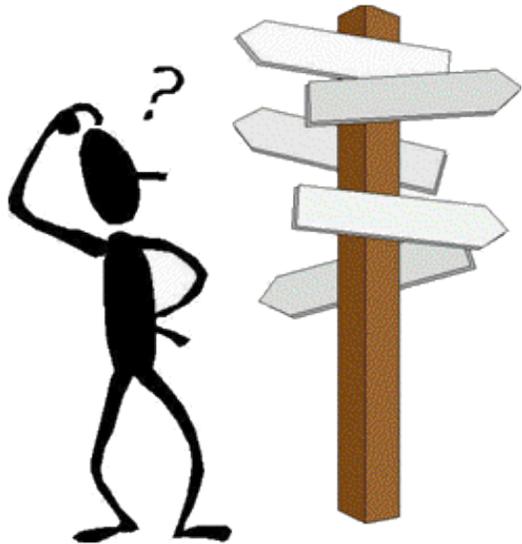
<https://servicedesk.ctclink.us/helpdesk/WebObjects/Helpdesk.woa>



Where to go for help?

- Review the 2015-16 URR Manual, available online at:

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



- Contact Washington Student Achievement Council staff at:

unitrecord@wsac.wa.gov

Ann Voyles

360-753-7843

annv@wsac.wa.gov

Steve Thorndill

360-753-7851

stevet@wsac.wa.gov