

UNIT RECORD REPORT MANUAL

2017-18 ACADEMIC YEAR

JUNE 2018

UNIT RECORD REPORT

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Unit Record Report Manual

Overview and Updates

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, which 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 office of student financial assistance within the Washington Student Achievement Council (WSAC) has authority to collect the URR according to 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 WSAC's statutory charge, as cited above, and the need for student-specific information to carry out WSAC's administrative and research responsibilities.

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

Unit Record Report Uses

Student-level data with term-by-term program-specific financial aid information is needed by WSAC 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 WSAC 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 WSAC 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 institutions receive.

Use of Unit Record Report for Research Purposes

WSAC has expanded the scope of data uses for the URR. Data-sharing requirements were established with House Bill 2261 (Chapter 548, Laws of 2009), which added new sections to RCW 43.41.400, to answer “critical questions” from various stakeholders and policymakers and non-critical questions developed by the general public.

This action 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 consent.

CHANGES OR EMPHASIS IN 2017-18 UNIT RECORD REPORT

The list below details the changes in field or record requirements in the 2017-18 URR. For additional guidance and instructions for these fields, see Chapter 2: Data Definitions; and Appendix B: Record Layout, unless otherwise indicated.

- **URR data edit match point of reference change**: Beginning with the 2017-18 URR, the point of reference for data edits has moved from the Final Interim Report to the College Bound/SNG Award Warehouse (CSAW). WSAC expects this revision to reduce the incidence of edit errors experienced by institutions by aligning data matching to a source that includes adjustments subsequent to the year-end Final Interim Report reconciliation process, for example, late refund returns. The Final Interim Report provides an earlier “snapshot in time” that does not account for these later adjustments.
- **Race/Ethnicity Data**: As demonstrated in the URR CSV file header example available [online](#), WSAC expects that all race and ethnicity fields will contain one of four responses: ‘n’ or ‘false,’ or ‘y’ or ‘true,’ with very few exceptions for blanks.

Beginning with the 2017-18 URR, the Portal will count as ‘n’ or ‘false’ all race and ethnicity fields left blank by the institution, a departure from past practice. Remember to report all available race and ethnicity data to eliminate reporting gaps. Leave fields blank only if race or ethnicity information is unavailable or unknown.

WSAC is implementing this change to reduce issues counting race data, especially when certain key fields remain blank. As a past example, the URR counted race fields only if the Hispanic Origin field contained an ‘n’ or ‘false.’ In instances in which the Hispanic Origin field remained blank, the URR did not count the other race field(s) for that record, skewing the data outcome. WSAC anticipates that this change may reduce or eliminate the need to reopen the URR after submission for institutional edit of these records or a new file upload to account for the missing Ethnicity/Race data during WSAC’s URR reviews.

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), which include: [Hispanic Origin](#) (Ethnicity only); [American Indian or Alaska Native](#); [Asian](#); [Black or African American](#); [Hawaiian or Pacific Islander](#); [White](#); and [Race Other](#).

- **Cost of Attendance (COA) and Tuition Waivers**: As described in Chapter 2, page 28, of the 2017-18 State Need Grant/College Bound Scholarship program manual, report the full-assessed tuition amount before application of tuition waiver(s) in the Cost of Attendance. Report all need and non-need based tuition waivers in either the NeedBasedInstitutionalGiftAid or NonNeedBasedInstitutionalGiftAid category, as appropriate, providing for capture of actual costs as compared to the aid received by the student. This formula for calculation of the COA was optional for the 2016-17 URR, however, it is a requirement for the 2017-18 URR.

“A student receiving SNG or CBS must have the full assessed tuition amount included in his/her Cost of Attendance. This COA amount must be reported when the Unit Record Report (URR) is submitted. In addition, all tuition waivers received by SNG and CBS recipients must be reported either as Need-Based Institutional Gift Aid or as Non-Need Based Institutional Gift Aid on the URR. [Note: The full assessed tuition amount is what the student is or would be assessed before any tuition waiver(s) have been applied.]

“If a student receives other need-based assistance, but does not receive SNG or CBS, WSAC requests that any tuition waiver(s) received by the student be reported as institutional gift aid and that the full assessed tuition amount be included in the COA whenever possible when the URR is submitted.

“A student who receives non-need based tuition waiver(s), but does not receive any need-based financial assistance, is not reported on the URR.”

- Change in **valid input range** before edits are produced:
 - [Federal Pell Grant](#) – Valid input range is 0 to 8880.
 - [Federal TEACH Grant](#) – Valid input range is 0 to 99,999
- **[Teacher Shortage Conditional Grant](#)**: New state program with first disbursements during 2017-18. Report as “ConditionalLoans.”
- **Reminder**: Institutions may test their upload file in the Portal training environment prior to upload 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 and make corrections to data edits in the upload file before attempting to make a final URR Portal submission in the live site. The training website is located at:

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

UNIT RECORD REPORT 2017-18 TIMELINE

August 2018:	Unit Record Report training webinars. WSAC will announce specific times and dates during the summer.
August 13, 2018:	Unit Record Report Application available for initial uploading of data into the WSAC Secure Portal.
October 19, 2018:	Unit Record Report final submission date.
October/November 2018:	WSAC staff data editing and review.
December 2018:	Unit Record Report data finalized.
January 2019:	Unit Record Report Institutional Profile reports available for 2017-18 year.

Institutions must submit complete and accurate data by the due date to meet the reporting deadline. WSAC staff members 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 be considered not to have met minimum administrative capability requirements. Those institutions may be placed in a probationary or terminated status for participation in state financial aid programs.

Due Date for Unit Record Report: October 19, 2018

UNIT RECORD REPORT

2017-18 ACADEMIC YEAR

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CHAPTER 1 – GENERAL INSTRUCTIONS

Students to be Included

Need-Based Recipients

Submit one record for each student at your institution who received any need-based financial aid, regardless of source. This includes Washington residents and nonresidents. Report all aid, including non-need based aid sources, 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 aid programs and aid types WSAC considers as need-based for the URR. Further, the programs are differentiated by whether 2017-18 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 or WASFA required):** All 2017-18 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 or WASFA optional):** If available, all 2017-18 FAFSA or WASFA data must be reported for all students receiving any aid shown in Appendix A as “Need-Based (FAFSA or WASFA data optional).”

FAFSA or WASFA data submission requirements are described in more detail in Chapter 2.

Non-Need Based Federal Loan Recipients

Also, submit one record 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 2017-18 academic year. For need-based recipients this will include all academic and summer terms for which 2017-18 FAFSA or WASFA data are used. Aid reported may include summer 2017 funding and/or summer 2018 funding. You will find included in Chapter 2 specific information regarding which summer aid term(s) to report.

Information To Be Reported

Please ensure you are reporting the data from the transaction the student’s award was based on.

Reporting Application

URR data collection takes place through the WSAC Secure Portal. This tool allows each institution to enter and edit data before submitting the final report to WSAC.

The Portal 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. WSAC staff will provide technical assistance as needed to any institution experiencing problems with the application.

WSAC staff make every effort to ensure the accuracy of URR data. Notify WSAC staff if your institution anticipates or identifies any errors after submitting the report to initiate any necessary data correction.

General File and Data Formats

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

Report all financial aid fields as integers. Round decimals to the nearest whole number. Round down for decimals from .1–.49999, and round up for decimals from .5–.99999.

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

All numbers provided must be positive numbers or zero '0' with the exception of the Family Income field only. Negative numbers are acceptable in the Family Income field, as necessary.

Uploading the CSV File

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

The upload will fail if the CSV file format is incorrect or does not contain all expected data elements. In that case, the system will provide information to assist in identifying any errors or omission for correction 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, the system will review all records for valid values.

Testing the Upload File

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 to the upload file before attempting to make a final URR Portal submission in the live site. The training website is located here:

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

Profile Reports

After the URR team has reviewed and finalized data from each institution, WSAC will release the 2017-18 profile reports 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.

CHAPTER 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. No duplicate Social Security Numbers allowed.

- **Students Reported in CSAW** – This should be the same SSN or identification number as reported in the SNG and CBS College Bound/SNG Award Warehouse (CSAW) record. The order of preference is as follows:
 - Social Security Number
 - Nine-digit tax identification number
 - WASFA applicant identification number (check WASFA Portal page; begins with '980')

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

- **Students Not Reported in CSAW** – When reporting data for a student that does not appear in the SNG and CBS CSAW record, 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 over-rideable.

Private institutions: You may use the identification number assigned to the student by the institution. The field is optional and may remain 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 last 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 01/01/1943 to 12/31/2003. **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](#) and [Chapter 250-18 WAC](#)).

Private Institutions: “Washington resident” is defined as a student who meets the residency requirements for the purposes of the State Need Grant program. If residency has not been determined for state-funded financial aid programs, and the student is not

receiving state financial aid, you may use the student's permanent mailing address for reporting 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 disbursement was made for the 2017-18 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. Report this student 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 2017-18 disbursement was made. After this term was completed, the student had earned enough credits to enroll as a sophomore for the next term. Report this student 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 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. You may report two or more races.

Report all race and ethnicity data, if available, to eliminate reporting gaps. Leave blank only if race or ethnicity information is not available or unknown. NOTE: Beginning with the 2017-18 URR, the Portal will interpret all blank race or ethnicity fields as 'n' or 'false.'

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 2017-18 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, report the student as "independent."

Example 2: The student's family income for 2015 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 2017 due to a lengthy period of unemployment. The income adjustment was approved and was used to determine eligibility. In this case, report \$55,000 as the family income.

These data are optional for non-need based federal loan recipients who did not receive need-based financial aid. After finalizing the URR, WSAC will delete unnecessary FAFSA or WASFA non-aid related data 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. Generally, this figure should match the number reported for this student in CSAW.

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, any 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, 2017, and June 30, 2018, 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. Generally, this figure should match the number reported for this student in CSAW. 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 2015 calendar year as reported on the 2017-18 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 (no decimals) and do not include dollar (\$) signs. Include a negative sign (-) for any negative amounts. 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)." Reporting of actual income allows for more accurate reporting of average family income levels. Generally, this figure should match the number reported for this student in CSAW.

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

For Independent Student: Sum of student and spouse 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 2017-18 year. This applies to full year awards made at the beginning of the academic year when students opt not to attend all terms.

- 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, it is important for the data to be consistent if changes are made in an institution's data record. The following examples may be of assistance:

Example 1: Student enrolled is expected to enroll for a nine-month academic year. Report all four fields on that basis.

Example 2: Student originally was 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, report enrollment status and financial aid disbursement amounts 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, and living, personal, and transportation expenses. The Cost of Attendance should be consistent with the number of months reported in the Need Duration.

NOTE: Include the full-assessed tuition amount to calculate and report in the URR the true Cost of Attendance (COA) for recipients of SNG, CBS, and other need-based assistance. The full-assessed tuition amount is what the student is, or would be assessed, before any tuition waiver(s) have been applied. This was optional reporting for 2016-17, however, this information is required for the 2017-18 URR. See the 2017-18 State Need Grant/College Bound Scholarship program manual, Chapter 2, Cost of Attendance (COA) and Tuition Waivers.

Expected Family Contribution

The Expected Family Contribution (EFC) usually will be the Federal Methodology (FM) calculation produced by the U.S. Department of Education based on the 2017-18 FAFSA or WASFA. If a financial aid administrator has made a professional judgment decision to adjust the FM EFC, report the adjusted EFC amount. 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.

NOTE: If an institution also calculates an Institutional Methodology (IM) expected family contribution that differs from the FM EFC, report the FM rather than the IM amount as the EFC.

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

For Independent Students: Base the expected family contribution 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.

Report the Need Duration as an integer 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.

$$\begin{array}{r} \text{Cost of Attendance} \\ - \text{Expected Family Contribution} \\ \hline = \text{Need Amount} \end{array}$$

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

Reporting Term Enrollment and Financial Aid for Five Terms

Report enrollment and financial aid received 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

For students for whom data is required on the URR, report term enrollment statuses and financial aid received for all five terms. For any terms that students did not enroll, be sure to report the TermEnrollmentStatus as '0' or 'Not enrolled.' For any terms that students did not receive aid, be sure to report '0' for each aid program.

For some institutions, the academic year may cover the July 2017–June 2018 timeframe. For others, it may more closely represent the dates of August 2017–July 2018. In most cases, it will not exceed 12 months. If you are reporting assistance for students who did not submit a FAFSA or WASFA, use the same timeframe for these students as you use for FAFSA or WASFA filers.

NOTE: The URR checks to ensure that a positive enrollment status (any status except for '0' or 'Not enrolled') is reported for each term that aid was reported on a student record, excepting certain work programs (e.g., State and Federal Work Study, and work force training funds, which allow for payment during a non-enrolled term, such as Summer). This edit is overrideable.

Quarter and Semester Term Institutions

Most institutions will use either the Summer 1 term or the Summer 2 term, but not both. For the term that is not used, either '0' or 'Not enrolled' should be input for the term enrollment status.

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

Semester institutions normally will use fall, spring, and appropriate summer terms for the reporting of financial aid recipients. If the student received disbursement of specific grant, scholarship, or loan assistance 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, combine and report the financial aid and term enrollment status as a single summer term.

Example 1: A student at a "trailer" institution received financial aid for two short summer sessions in 2018, based on the 2017-18 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 2017 term based on the 2017-18 FAFSA or WASFA. At the time of the URR submission, the student also received financial aid for the summer 2018

term (based on a 2018-19 FAFSA or WASFA). Report aid received during the summer of 2017 as 'Summer 1'. Report 'Summer 2' enrollment status and corresponding financial aid fields as '0'. (Note: In this case, report the 2018 summer enrollment and aid received on the 2018-19 URR.)

Combination of leader and trailer awards: If your institution awarded some programs under leader rules and other programs under trailer rules, report leader awards in Summer 1 and report trailer awards 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. Base the reporting periods 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 for the 2017-18 year.

Term Date Ranges for Clock-Hour Institutions

These reflect the same date ranges that appeared in the 2017-18 SNG manual.

Term	From	To
Summer 1	July 1, 2017	September 11, 2017
Fall	September 12, 2017	November 22, 2017
Winter	November 23, 2017	February 5, 2018
Spring	February 6, 2018	April 18, 2018
Summer 2	April 19, 2018	June 30, 2018

Term Enrollment Status

Report enrollment based upon the student's status or scheduled clock hours at the time of financial aid disbursement 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 Time	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 Time	'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 listed below, report for the five terms. Indicate '0' for all terms that a student did not receive specified aid. Do not leave any fields blank.

Consistency with other WSAC Reporting: WSAC will compare information provided in the URR for programs such as SNG, CBS, and Passport to College on a recipient basis with information submitted in CSAW 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.

Federal Aid Programs

Federal Pell Grant

The amount of Federal 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, include any earnings received between the terms as either fall or spring term. 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 September–December earnings as fall term aid and January–May earnings 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, you may report \$1,631 as fall term earnings and \$1,630 as 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. Another name for this program is 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. An alternate name for this program is 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 (SNG)

The amount of State Need Grant funds received by the student. The amount reported normally should be the same amount reported in CSAW.

College Bound Scholarship (CBS)

The amount of College Bound Scholarship funds received by the student. The amount reported normally should be the same amount reported in CSAW.

Passport to College Scholarship

The amount of Passport to College Scholarship funds received by the student. In the unusual circumstance that an incentive grant was 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 on the URR that the student received a \$5,000 Passport to College Scholarship. The amount reported normally should be the same amount reported in CSAW for PTC.

GET Ready for Math & Science

The amount of GET Ready for Math & Science scholarship funds received by the student. This program no longer is funded, and it is likely that all students will be reported with '0' aid received.

Opportunity Scholarship

The amount of Opportunity Scholarship funds received by the student. This program also is known as the Washington State Opportunity Scholarship. Washington STEM administers the program.

SBCTC Opportunity Grant

The amount of State Board for Community and Technical Colleges (SBCTC) Opportunity Grant funds received by the student. Note: This grant is available only to students attending community and technical colleges, 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, Washington

Scholars, and the American Indian Endowed Scholarship), that are not included in another state aid category.

Do not report family-purchased [Guaranteed Education Tuition](#) (GET) fund distributions in the Unit Record Report.

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, include any earnings received between the terms as either fall or spring term. 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 September–December earnings as fall term aid and January–May earnings 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, 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, include any earnings received between the terms as either fall or spring term. 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 are available (see On-Campus section above).

If the institution acts as the employer of record and the student works off campus, it is preferable to report earnings as off-campus State Work Study. If accounting constraints do not permit recording of earnings as off-campus, report the earnings 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 based on need.

Report institutional scholarships, grants, and waivers awarded only based on merit or other non-need based criteria as Non-Need Based Institutional Gift Aid.

- For SNG and CBS recipients, report all need-based tuition waivers in this category of the URR. The institution must ensure that student COAs reported include the true cost of tuition (that is, the full assessed tuition amount before the waiver is applied). This data is required for the 2017-18 URR.
- For recipients of other need-based aid who did not receive SNG or CBS, report any need-based tuition waiver(s) in this category of the URR and, whenever possible, the full-assessed tuition amount is to be included in the COA.

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 2017-18 FAFSA, WASFA, or other need determination.

Report institutional grants, scholarships, and waivers awarded solely or partially based on need as Need-Based Institutional Gift Aid.

- For SNG and CBS recipients, report all non-need based tuition waivers in this category of the URR. The institution must ensure that the student's reported COA includes the true cost of tuition (that is, the full assessed tuition amount before the waiver is applied). This data is required for the 2017-18 URR.
- For recipients of other need-based aid who did not receive SNG or CBS, report any non-need based tuition waiver(s) in this category and, whenever possible, the full-assessed tuition amount is to be included in the COA.
- Do not report in the URR a student who received non-need based tuition waiver(s) but did not receive any need-based financial assistance.

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 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, include any earnings between the terms as either fall or spring term. 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 student. Do not include "short term" or "emergency" loans generally repaid within a few months. Report only those students who have also received other need-based assistance.

Other Financial Aid Programs

For any additional conditional, private, or other loans not 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 unmet. Examples include state-funded conditional scholarship programs and other conditional scholarships/loans such as Alternative Routes to Teacher Certification, Pipeline for Paraeducators Conditional Scholarship, Educator Retooling, Future Teachers Conditional Scholarships, and the Teacher Shortage Conditional Grant.

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 scholarship 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, federal Education and Training Vouchers (ETV), and other agency assistance.

CHAPTER 3 – REPORTING APPLICATION USER’S GUIDE

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

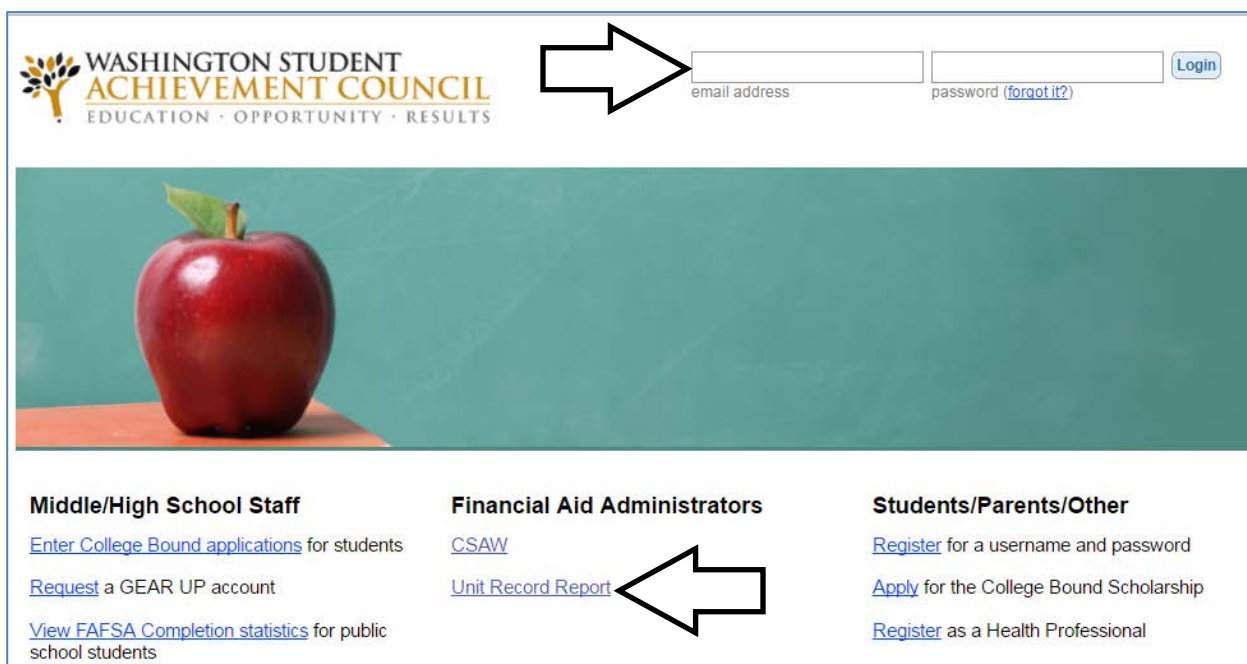
This section starts with an overview of the application and continues with step by step instructions.

Accessing the Portal Application

The URR application is located on WSAC’s Portal website:

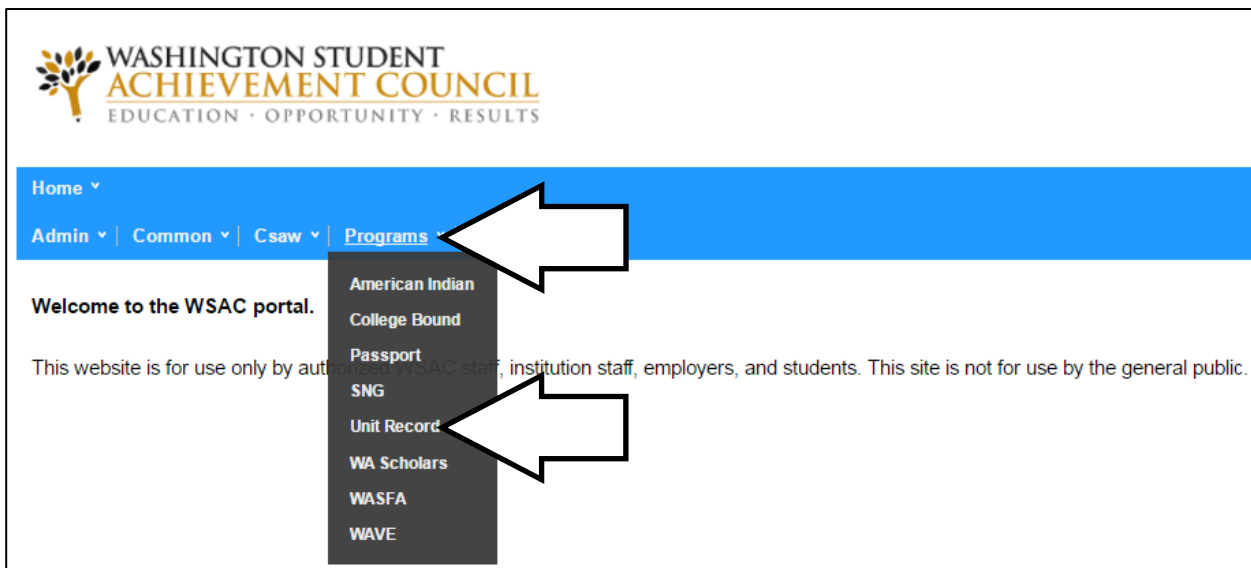
<https://fortress.wa.gov/wsac/portal>.

Enter your email address and password in the top right corner to log in, or click “Unit Record Report” under the Financial Aid Administrators heading and log in when prompted at the secondary login screen. If you do not have access to the Portal, contact WSAC staff at unitrecord@wsac.wa.gov.

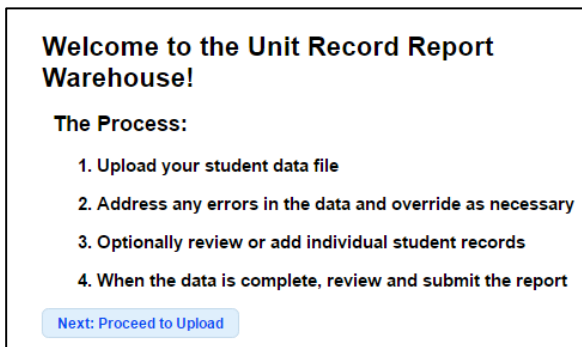


Under the “Programs” menu across the top, click on “Unit Record.”

NOTE: Your menu may have different menu options depending on the programs you have permission to access. If “Unit Record” does not show in your menu, contact WSAC staff at unitrecord@wsac.wa.gov.

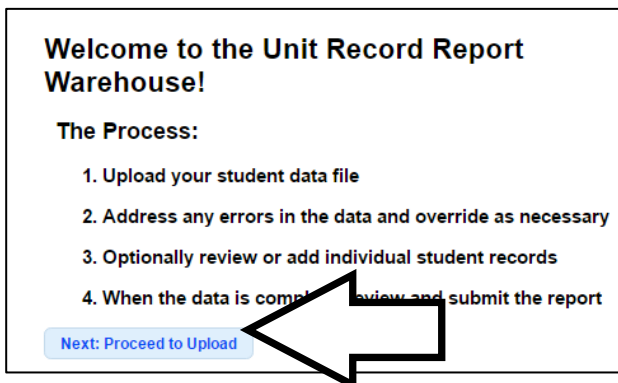


You will encounter the following “Welcome” screen upon your first URR login for the year. If the URR file was uploaded during an earlier Portal session, you will be taken directly to the appropriate status screen upon login instead of the “Welcome” screen; that is, “Ready to Begin,” “In Progress,” or “Submitted.”



Uploading Data from a File

From the “Welcome” screen, click on the “Next: Proceed to Upload” button.



Click the “browse” button to find the file on your PC that you want to upload. Be sure to select a file saved in CSV format; then, click the “upload” button. **CAUTION:** Upload of a new file will delete all prior data and any overridden errors from the system.

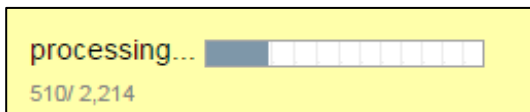
PLEASE NOTE: Each upload attempt represents a FRESH start. All existing data for the year will be deleted.

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

No file selected...
browse

upload
manually

The upload process may take a while, depending on file size. The “Processing” progress bar shows the ratio of records processed to the total records contained in the file download (shown below) and can be used to determine how much of the file upload has been completed.



Deleting a File Upload in Process

The “Discard Upload” button appears immediately upon initiating a URR file upload. Clicking the “Discard Upload” button interrupts and deletes the file upload mid-process, allowing you to select and upload a different file. This functionality permits users to cut short potentially long wait times if you discover a critical error(s) in a high-volume file during upload. The “Discard File” button also remains available after upload has completed.

Upload Unit Record Data

Processing file...

initializing...

discard upload

If a fully uploaded file contains errors, you will see a message like the one below, indicating that file correction is necessary and then resubmitted. 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 the file.

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

The following errors were encountered:

- Row 2: Field 'IsStateResident' is required
- Row 14: Field 'FirstName' is required
- Row 25: Field 'Summer1FederalSEOG' must contain a value.
- Row 55 Field SSN: '1111' is an invalid value.
- Row 61: Field 'IsStateResident' is required
- Row 90: Field 'Summer1FederalSEOG' must contain a value.

[download errors to csv](#) [discard file](#)

Editing Student Records

If the file uploads successfully, you will see the following message: “File Upload Complete!” Verify the number of student records uploaded and Year In School distribution with your institutional 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
Sophomore/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 the record review process has completed. Click “refresh” to display edits.

processing...

74/ 301

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.

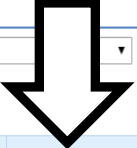
Alternatively, we can [email you a csv download](#) of all your edits once processing completes.

Unit Record Edits


Your data is still processing, so you may still have edits to address. [Refresh this page](#) periodically to see if any new edits were processed.

[refresh](#)

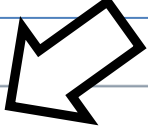
On the Unit Record Edits page(s), the Overrideable column shows the edit type. “Overrideable” means you may correct the edit or enter an override reason on the student record. You must correct any non-overrideable edits (red hexagon) in the student record before you can move forward.

Unit Record Edits 10 errors (9 overrideable - 0 overridden; 0 informational) Filter by Edit Type 


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

SSN	Student ID	Last	First	Middle	Error	Overrideable
222222223		Aardvark	Andrus		State Need Grant award not found in CSAW	Overrideable
222222223		Aardvark	Andrus		State Need Grant Amount Differs From CSAW (CSAW: 0; unit record: 1976)	Overrideable
444444445		Actor	Shakespeare	J	State Need Grant award not found in CSAW	Overrideable
444444445		Actor	Shakespeare	J	State Need Grant Amount Differs From CSAW (CSAW: 0; unit record: 2823)	Overrideable
444444445		Actor	Shakespeare	J	Passport To College Amount Differs From CSAW (CSAW: 0; unit record: 3000)	Overrideable
101111111		Adrenaline	Rush	A	Federal Grad PLUS Loan recipient must be reported as graduate student	

To override or correct an edit, click the SSN number to open the student record. Error messages are displayed at the top of the screen below the student’s identifying information. To edit the record, click into the appropriate field, enter the correction, and then click “Save.”

101-11-1111 **Adrenaline, Rush A** 

Errors

Federal Grad PLUS Loan recipient must be reported as graduate student 

State Need Grant Amount Differs From CSAW (CSAW: 0; unit record: 659) [+ Override](#)

State Need Grant award not found in CSAW [+ Override](#)

Student Demographics and Need **Student Aid**

To override, click the “Override” button. Briefly explain the reason for the difference in the pop-up window, and click “Save”.

101-11-1111 [Add a new Unit Record](#)

Errors

Federal Grad PLUS Loan recipient m

State Need Grant Amount Differs Fro

State Need Grant award not found in

Student Demographics and N

SSN or WASFA Id 101-11

Last Name Adrenaline First Name Rush Middle Name A

Marital Status Separated

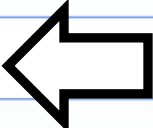
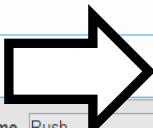
Override Unit Record Edit Error

Edit: State Need Grant Amount Differs From CSAW

Override Comment -

Override message goes here

[Save](#) [Cancel](#)

Overridden edit messages will change from red to gray in the errors list. To review any override comments you have made, hover the mouse over the blue information icon. The override comment will appear in a yellow pop-up box.

101-11-1111 Adrenaline, Rus

Errors

State Need Grant Amount Differs From CSAW (CSAW: 0; unit record: 659) Overridden by Am

State Need Grant award not found in CSAW Overridden by Am

Override message will appear here.

Student Demographics and Need Student Aid

Address all errors for each student record. If you correct all edits in the student record instead of entering overrides, a green “No Errors” message will appear at the top of the screen after the errors are corrected.

111-11-1113 Apple, Andy A

No Errors

Student Demographics and Need Student Aid

The gray “Errors” message will remain at the top of the screen if the student record has overridden edits, but there will no longer be any red edit messages.

101-11-1111 Adrenaline, Rush A

Errors

State Need Grant Amount Differs From CSAW (CSAW: 0; unit record: 659) Overridden by Am

Checking for Missing Data Previously Reported in WSAC Records

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

Unit Record Edits

9 errors (9 overrideable - 9 overridden; 0 informational)

Filter by Edit Type Show Informational ☐ Overridden ☒

All edits have been addressed Click To Continue →

Showing results 1 - 9 of 9 [Show SNG/CBS/PTC differences report](#)

SSN	Student ID	Last	First	Middle	Error	Overrideable
101111111		Adrenaline	Rush	A	State Need Grant Amount Differs From CSAW (CSAW: 0; unit record: 659)	Overridden


A “Y” in the Override Requested column flags differences already addressed through an override request.

SNG, CBS & Passport Differences Between Unit Record and CSAW. [Go to Edit List](#)

State Need Grant College Bound Scholarship Passport To College **Missing SNG Unserved Students**

Download differences to csv

SSN	Last, First	SID	WSAC SNG	Unit Record	Difference	Override Requested
222-22-2223	Aardvark, Andrus			\$1,976.00	\$1,976.00	Y




Differences not yet addressed show a blank in the “Override Requested” column. Click the “Download differences to csv” button to download a separate file to review unaddressed data edits, and identify missing student records that require addition to the URR.

SNG, CBS & Passport Differences Between Unit Record and CSAW. [Go to Edit List](#)

State Need Grant College Bound Scholarship Passport To College **Missing SNG Unserved Students**

Download differences to csv

SSN	Last, First	SID	WSAC SNG	Unit Record	Difference	Override Requested
222-22-2223	Aardvark, Andrus			\$1,976.00	\$1,976.00	Y



To add missing SNG/CBS/PTC data for student records already existing in your URR upload, click “Search” to locate and open the student record for edit.

Home ▾ Programs ▾ **Unit Record ▾**

Reports Search




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

Missing SNG Unserved Report

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 CSAW 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**

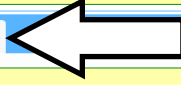
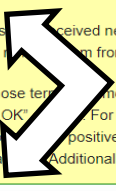
Download the .csv file and review for accuracy as described here, then return the annotated .csv file to WSAC URR team as a secure Portal email attachment, using the “Send an Email” button in the upper half of this screen.

For any students who received need-based aid or federal loan assistance, click “Return to the Edit List” and manually add unit records for those students; then run an updated .csv, to remove them from the Missing Unserved list.

For students whose term enrollment statuses ALL are accurate as shown AND no need-based aid or federal loan assistance was received, enter “Yes” in the “Indicate Yes If All Terms OK” column. For remaining students, enter the actual enrollment status (i.e., Full time; 3/4 time; Half time; LTH; or, Not enrolled) in the “Verify” column corresponding to the positive enrollment terms shown. Leave blank the “Verify” column corresponding to a term shown as “Not enrolled.” Do not overwrite or edit the original download. Additional notes may be placed in the “Comments” column.

Download unserveds to csv

SSN	Last, First	SID	Unserved Summer1	Unserved Fall	Unserved Winter	Unserved Spring	Unserved Summer2
			Full time	Full time	Full time	Full time	Full time
						Full time	Full time

The SNG/CBS/PTC difference report includes a tab titled “Missing SNG Unserved Students.” This tab shows a list of unserved SNG students reported by your institution in the 2017-18 CSAW, but for whom a corresponding 2017-18 URR record is missing. Download the CSV and review for accuracy. Follow the instructions below to complete and return an annotated CSV file to the WSAC URR team as a secure Portal email attachment, using the “Send an Email” button in the upper half of the Discrepancy Report screen.

Example of the CSV download file:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
	Academic							Indicate_Yes_i f_All_Terms_	Summer1Unser	Summer1Verify	FallUnser	FallVerify	WinterUnser	WinterVerify	SpringUnser	SpringVerify	Summer2Unser	Summer2Verify	
1	InstitutionName	Year	Ssn	SID	FirstName	MiddleInitial	LastName	OK	vedEnrollment	OrChange	Enrollment	OrChange	Enrollment	OrChange	Enrollment	OrChange	vedEnrollment	OrChange	Comments_Section
2	Example University	2017-2018	XXXXX1111	STU001	Aaron	N	Andrews		Not enrolled		Full time		Full time		Not enrolled		Not enrolled		
3	Example University	2017-2018	XXXXX2222	STU002	Betty	C	Bradley		Not enrolled		Not enrolled		Not enrolled		Full time		Full time		
4	Example University	2017-2018	XXXXX3333	STU003	Cathy	R	Calthorn		Not enrolled		Not enrolled		Not enrolled		Full time		Full time		
5	Example University	2017-2018	XXXXX4444	STU004	Dean	A	Dandy		Not enrolled		Not enrolled		Full time		Full time		Not enrolled		
6	Example University	2017-2018	XXXXX5555	STU005	Ella	L	Emerson		Not enrolled		Full time		Not enrolled		Not enrolled		Not enrolled		
7	Example University	2017-2018	XXXXX6666	STU006	Fiona	M	Friendly		Not enrolled		Not enrolled		Not enrolled		Full time		Not enrolled		
8	Example University	2017-2018	XXXXX7777	STU007	Greta	V	Grandy		Not enrolled		Not enrolled		Full time		Full time		Full time		
9	Example University	2017-2018	XXXXX8888	STU008	Hettie	A	Harmon		Not enrolled		Full time		Full time		Full time		Not enrolled		
10	Example University	2017-2018	XXXXX9999	STU009	India	L	Indigo		Not enrolled		Full time		Not enrolled		Full time		Full time		
11	Example University	2017-2018	XXXXX0000	STU000	James	C	Jameson		Not enrolled		3/4 time		Not enrolled		3/4 time		Not enrolled		

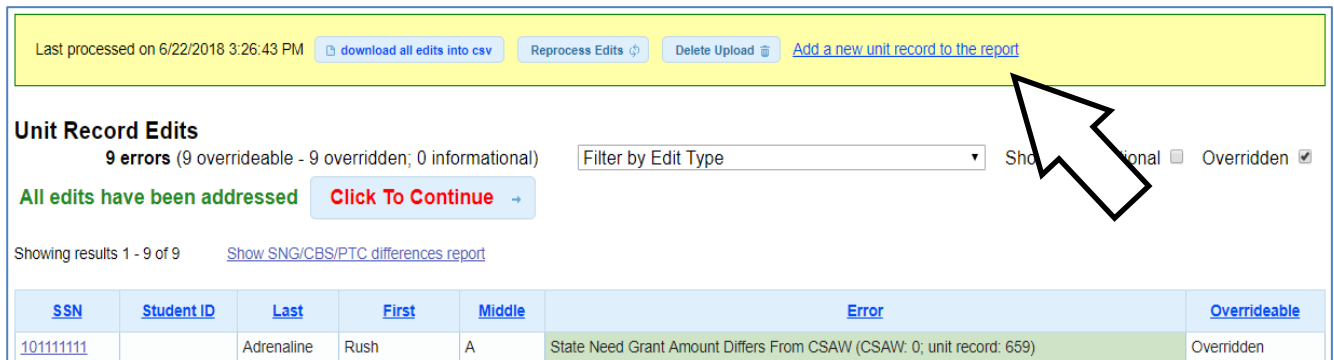
1. Identify those students appearing on the Missing SNG Unserved list who did receive need-based aid or federal loan assistance during the year, and manually add a unit record for them. To do so, click “Return to the Edit List” and follow directions in the section, “Manually Adding Student Records.” Then run an updated CSV file to remove those students from the report that you will annotate and return to the URR team.
2. For students who did not receive need-based aid or federal loan assistance:
 - a. IF the student’s enrollment statuses are accurate as shown on the download report for ALL positive terms of enrollment, enter “Yes” in the “Indicate Yes If All Terms OK” column. Leave blank any “Verify” columns for that student.
 - b. For all remaining students, enter the actual enrollment status (full time; 3/4 time; half time; or LTHT) in the “Verify” column for each term in which a positive enrollment status is reported for that student. You may leave blank those “Verify” fields associated with terms shown as a “Not enrolled” status, however, you may update if there was a status change.
3. For ALL students: Do not overwrite or edit text within the columns containing pre-filled content. Enter appropriate responses in the “Verify” or “Yes if All Terms OK” columns only. Or, place additional notes in the “Comments” section.

Here is an example of a completed, annotated, CSV file that is ready for return to the WSAC URR team. This example does address status changes to entries originally shown as “Not enrolled.”

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
	Academic							Indicate_Yes_i if_All_Terms_	Summer1Unser	Summer1Verify	FallUnser	FallVerifyOr	WinterUnser	WinterVerify	SpringUnser	SpringVerify	Summer2Unser	Summer2Verify	
1	InstitutionName	Year	Ssn	SID	FirstName	MiddleInitial	LastName	OK	vedEnrollment	OrChange	Enrollment	Change	Enrollment	OrChange	Enrollment	OrChange	vedEnrollment	OrChange	Comments_Section
2	Example University	2017-2018	XXXXX1111	STU001	Aaron	N	Andrews		Not enrolled		Full time	< Half time	Full time	Half time	Not enrolled	Full time	Full time		
3	Example University	2017-2018	XXXXX2222	STU002	Betty	C	Bradley	Yes	Not enrolled		Not enrolled		Not enrolled		Full time		Full time		
4	Example University	2017-2018	XXXXX3333	STU003	Cathy	R	Calthorn		Not enrolled		Not enrolled		Not enrolled		Full time		Not enrolled	Not enrolled	
5	Example University	2017-2018	XXXXX4444	STU004	Dean	A	Dandy	Yes	Not enrolled		Not enrolled		Full time		Full time		Not enrolled		
6	Example University	2017-2018	XXXXX5555	STU005	Ella	L	Emerson		Not enrolled		Full time		Not enrolled	Full time	Not enrolled		Not enrolled		
7	Example University	2017-2018	XXXXX6666	STU006	Fiona	M	Friendly		Not enrolled		Not enrolled		Not enrolled		Full time	Half time	Not enrolled		
8	Example University	2017-2018	XXXXX7777	STU007	Greta	V	Grandy		Not enrolled	Half time	Not enrolled		Full time	Not enrolled	3/4 time	Full time	Full time		
9	Example University	2017-2018	XXXXX8888	STU008	Hettie	A	Harmon		Not enrolled		Full time	3/4 time	Full time	3/4 time	Full time	Not enrolled	Not enrolled		
10	Example University	2017-2018	XXXXX9999	STU009	India	L	Indigo		Not enrolled		Full time		Not enrolled		Full time	Not enrolled	Full time	< Half time	
11	Example University	2017-2018	XXXXX0000	STU000	James	C	Jameson		Not enrolled		3/4 time	Half time	Not enrolled		3/4 time	3/4 time	Not enrolled		

Manually Adding Student Records

To add student records manually, click the “Add a new unit record to the report” button at the top of the Unit Record Edits page.



Last processed on 6/22/2018 3:26:43 PM [download all edits into csv](#) [Reprocess Edits](#) [Delete Upload](#) [Add a new unit record to the report](#)

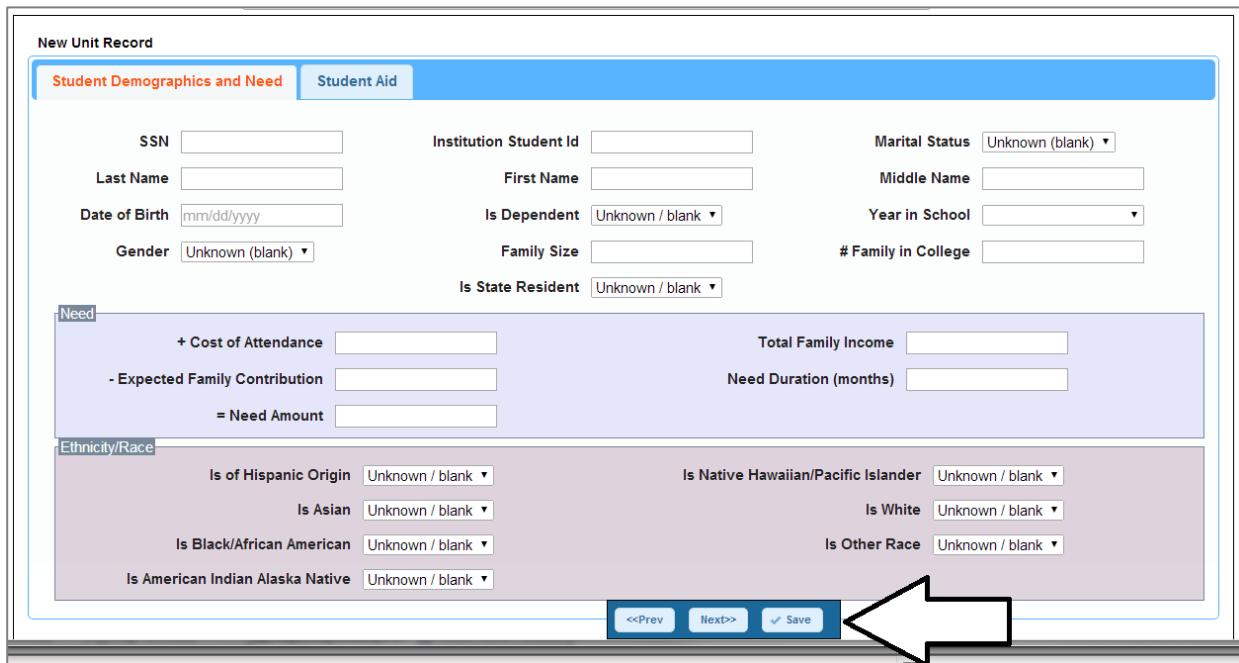
Unit Record Edits
 9 errors (9 overrideable - 9 overridden; 0 informational) [Filter by Edit Type](#) [Show SNG/CBS/PTC differences report](#) ☐ Informational ☒ Overridden

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

Showing results 1 - 9 of 9 [Show SNG/CBS/PTC differences report](#)

SSN	Student ID	Last	First	Middle	Error	Overrideable
101111111		Adrenaline	Rush	A	State Need Grant Amount Differs From CSAW (CSAW: 0; unit record: 659)	Overridden

Enter the student’s data into both tabs of the blank form. Complete all required fields and any other applicable fields. Click the “Save” button at the bottom to save the changes. Refer to the Editing Student Records section above if any flagged errors appear.



New Unit Record

Student Demographics and Need **Student Aid**

SSN Institution Student Id Marital Status

Last Name First Name Middle Name

Date of Birth 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

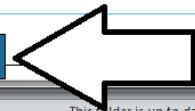
Is American Indian Alaska Native

[<<Prev](#) [Next>>](#) [Save](#)

New Unit Record

Student Demographics and Need		Student Aid					
	Enrollment Status	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. Connect

Submitting the Unit Record Report

Review your Summary Reports after you have addressed all edits and differences, and before submitting the URR.

When you are ready to submit your URR, select the “Click to Continue” button on the “Edits” page.

Last processed on 6/22/2018 3:26:43 PM [download all edits into csv](#) [Reprocess Edits](#) [Delete Upload](#) [Add a new unit record to the report](#)

Unit Record Edits
9 errors (9 overrideable - 9 overridden; 0 informational) [Filter by Edit Type](#) Show Information ☐ Overridden ☒

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

Showing results 1 - 9 of 9 [Show SNG/CBS/PTC differences report](#)

SSN	Student ID	Last	First	Middle	Error	Overrideable
101111111		Adrenaline	Rush	A	State Need Grant Amount Differs From CSAW (CSAW: 0, unit record: 659)	Overridden

You will have one more 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, you can edit the records by clicking “Return to the Edit List.” If you submit the URR with significant differences, WSAC staff will contact you to explain those differences before WSAC finalizes the report.

You cannot correct any SSN mismatch that originated in the SNG/CBS/PTC CSAW record from the institution side of the URR Portal. Click the “Send an Email” button and create a secure email to the Unit Record Report team, which will initiate the SSN correction for you from the WSAC side of the Portal.

After you have addressed all edits and differences on these tabs, press the “Click to Continue” button.

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 CSAW 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 differences to csv](#)

SSN	Last	First	SID	WSAC SNG	Unit Record	Difference	Override Requested
-----	------	-------	-----	----------	-------------	------------	--------------------

The next screen displays 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 WSAC staff to discuss available options if that is the case. If everything appears reasonable, press the “Click to Continue” button.

Submit Unit Record Data

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 is non-need based aid; Non-essential data will be removed from Final Institutional Totals Report after all URRs are finalized..

Uploaded by Ann Voyles on 5/30/2018 [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	2014-2015 Amount	2015-2016 Amount	2016-2017 Amount	2017-2018 Amount	%Change Current vs Previous	2014-2015 Recipients	2015-2016 Recipients	2016-2017 Recipients	2017-2018 Recipients	% Change Current vs Previous
Federal										

After reviewing the 2017-18 information in the “Program Totals Report,” you also have an opportunity to review the “Demographic Report” before submitting your report. If all data appears reasonable, click “Submit Your Unit Record Report.”

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 reports are available for download.

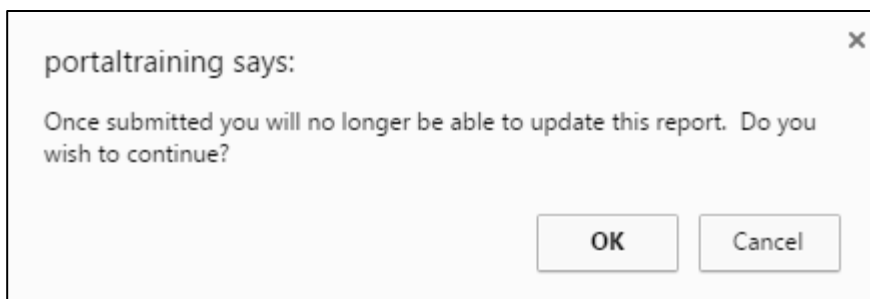
The following reports present a summary analysis of the Unit Record data for your institution:

- [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 2019. 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 to remind you that additional changes to the data cannot take place without contacting the WSAC Unit Record Report team after you submit the URR. If ready to continue, click “OK.”



After submitting URR data successfully, you will see the following message, and WSAC staff will receive a corresponding email of the URR submission. Contact the WSAC Unit Record Report team at unitrecord@wsac.wa.gov if you identify any additional changes necessary to the data after submission.

Unit Record Report -- Submitted (Name of Institution here) 2017-2018 Submitted

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

Uploaded by [Redacted]
Submitted by [Redacted]

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 2019. 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

Reports Available After Submission

We recommend that you retain copies of the Program Totals Report and Demographic Distribution Reports after submitting your final URR. You may also review previous-year Profile Reports at this time.

PLEASE NOTE: WSAC will remove any non-essential, non-need based data from your institution's records after WSAC has finalized all URRs. This means that, prior to final closure of all URR submissions for the year, your preliminary Institutional Totals Report column for 2017-18 may include some non-need based aid that WSAC will remove later. Until WSAC removes all non-essential non-need based aid from the 2017-18 column, your Program Totals Report could reflect a greater percentage change between 2016-17 and 2017-18 than will appear after WSAC releases the final reports for 2017-18 in January 2019.

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.

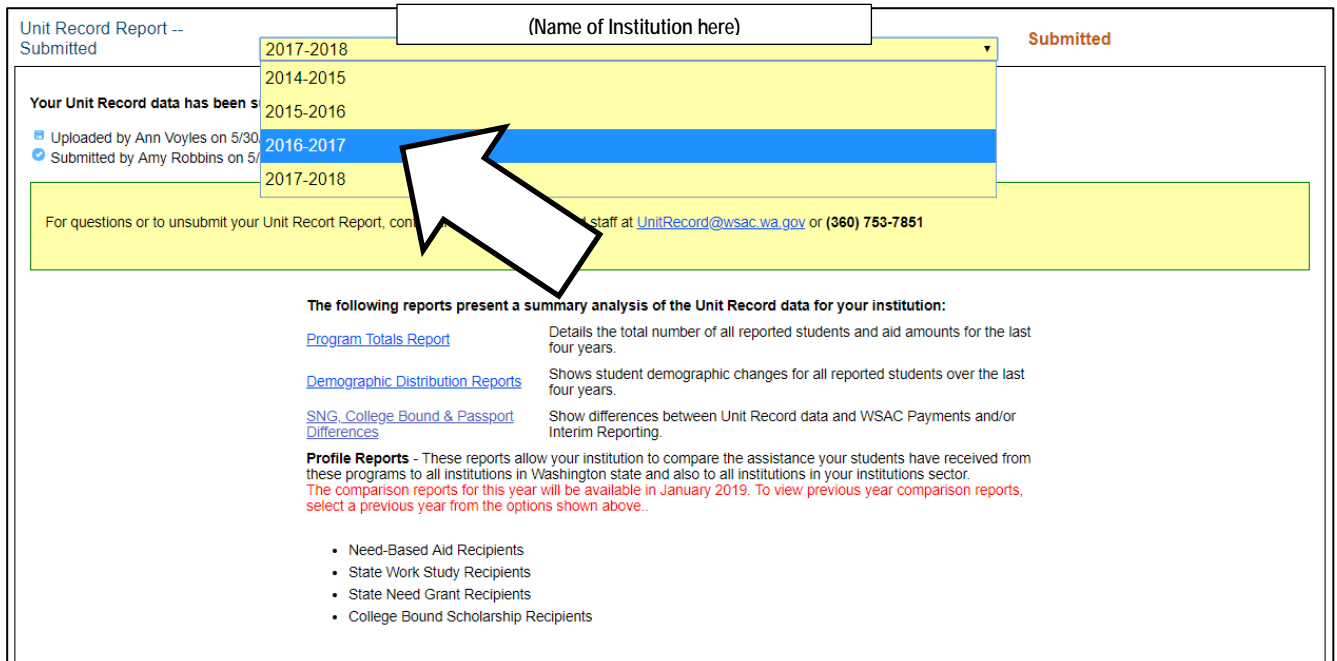
The comparison reports for this year will be available in January 2019. To view previous year comparison reports, select a previous year from the options shown above..

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

Updated Profile Reports Available in January 2019

Updated Profile Reports that include 2017-18 comparison information of the institution's data to all institutions in the same sector, as well as to all institutions in the state, will be available in January 2019. Institutions will receive an email announcement when those reports are available.

Prior to January 2019, Profile Reports are available with comparison information for several previous years. You may download and print those reports as a 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:



Unit Record Report -- Submitted

(Name of Institution here)

Submitted

Your Unit Record data has been s

Uploaded by Ann Voyles on 5/30

Submitted by Amy Robbins on 5/30

2017-2018

2014-2015

2015-2016

2016-2017

2017-2018

For questions or to unsubmit your Unit Record Report, contact 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 2019. 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

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

NOTE: Aid types below are listed in the same order as the File Format shown in Appendix B.

<i>Are aid types need-based or not?</i>	Need-Based (FAFSA or WASFA data required)	Need-Based (FAFSA or WASFA data optional)	Non-Need Based Federal Loans	Non-Need Based Other Programs
<i>What recipients should be reported?</i>	Report all recipients	Report all recipients	Report all recipients	Only report recipients who are also need-based recipients
<i>Should FAFSA or WASFA data be submitted?</i>	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		

Appendix A

<i>Are aid types need-based or not?</i>	Need-Based (FAFSA or WASFA data required)	Need-Based (FAFSA or WASFA data optional)	Non-Need Based Federal Loans	Non-Need Based Other Programs
<i>What students should be reported?</i>	Report all recipients	Report all recipients	Report all recipients	Only report recipients who are also need-based recipients
<i>Should FAFSA or WASFA data be submitted?</i>	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 – Need Based	X			
Conditional Loans – Non-Need Based				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 WSAC 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 CSAW: Report the same number used in CSAW. For students not reported in CSAW: 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. Privates may leave this field blank.	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

Appendix B

Field/Column Header Name	Valid Inputs	Remarks	Changes?
DateOfBirth	Most standard US database date-only outputs are supported e.g.: <ul style="list-style-type: none"> • 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 remain blank. Standard US dates. Two digit years 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 2017-18 year.	No
IsOfHispanicOrigin	'y' or 'true' 'n' or 'false' blank if not reported	Report data if available. Leave blank only if information is not available. Blanks counted as 'n' or 'false.'	Yes
IsRaceAmericanIndianAlaskaNative	'y' or 'true' 'n' or 'false' blank if not reported	Report data if available. Leave blank only if information is not available. Blanks counted as 'n' or 'false.' May report Race as 'y' or 'true' in one or more race category.	Yes
IsRaceAsian	'y' or 'true' 'n' or 'false' blank if not reported	Report data if available. Leave blank only if information is not available. Blanks counted as 'n' or 'false.' May report Race as 'y' or 'true' in one or more race category.	Yes

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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. Blanks counted as 'n' or 'false.' May report Race as 'y' or 'true' in one or more race category.	Yes
IsRaceNativeHawaiianPacificIslander	'y' or 'true' 'n' or 'false' blank if not reported	Report data if available. Leave blank only if information is not available. Blanks counted as 'n' or 'false.' May report Race as 'y' or 'true' in one or more race category.	Yes
IsRaceWhite	'y' or 'true' 'n' or 'false' blank if not reported	Report data if available. Leave blank only if information is not available. Blanks counted as 'n' or 'false.' May report Race as 'y' or 'true' in one or more race category.	Yes
IsRaceOther	'y' or 'true' 'n' or 'false' blank if not reported	Report data if available. Leave blank only if information is not available. Blanks counted as 'n' or 'false.' May report Race as 'y' or 'true' in one or more race category.	Yes
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 blank if FAFSA or WASFA data unavailable.	No
IsDependent	'y' or 'true' 'n' or 'false'	Required for all need-based aid recipients with a FAFSA or WASFA on file. May be blank if FAFSA or WASFA data unavailable.	No
FamilySize	Integer > 0 1 to 20	Required for all need-based aid recipients with a FAFSA or WASFA on file. May be blank if FAFSA or WASFA data unavailable. Matched to CSAW data.	No

Appendix B

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 blank if FAFSA or WASFA data unavailable. Matched to CSAW data.	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. Matched to CSAW data.	No
CostOfAttendance	Integer 0 to 250000	Required for all need-based aid recipients with a FAFSA or WASFA on file. May be blank if FAFSA or WASFA data is not available. Must use full assessed tuition amount in COA calculation for SNG and CBS recipients, and when possible, for recipients of other need-based aid.	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. Report FM only.	No
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.	No

Enrollment Status and Payments by Term Section

The following set of fields appears five (5) times each 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?
<u>TERMEnrollmentStatus</u>	'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
<u>TERMFederalPellGrant</u>	Non-negative Integer 0 to 8880	Need-based (FAFSA data required). Report all recipients.	<u>Yes</u>
<u>TERMFederalSEOG</u>	Non-negative Integer 0 to 6000	Need-based (FAFSA data required). Report all recipients.	No
<u>TERMFederalTEACHGrant</u>	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	<u>Yes</u>
<u>TERMFederalNursingScholarships</u>	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
<u>TERMFederalWorkStudy</u>	Non-negative Integer 0 to 99999	Need-based (FAFSA data required). Report all recipients.	No
<u>TERMFederalPerkinsLoan</u>	Non-negative Integer 0 to 12000	Need-based (FAFSA data required). Report all recipients.	No
<u>TERMFederalNursingHealthLoans</u>	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
<u>TERMFederalDirectSubsidizedLoans</u>	Non-negative Integer 0 to 20000	Need-based (FAFSA data required). Report all recipients.	No
<u>TERMFederalDirectUnsubsidizedLoans</u>	Non-negative Integer 0 to 90000	Non-need based federal loans. Report all recipients.	No
<u>TERMFederalParentPLUSLoans</u>	Non-negative Integer 0 to 99999	Non-need based federal loans. Report all recipients.	No

Appendix B

Field/Column Header Name	Valid Inputs	Remarks	Changes?
<u>TERMFederalGradPLUSLoans</u>	Non-negative Integer 0 to 99999	Non-need based federal loans. Report all recipients.	No
<u>TERMStateNeedGrant</u>	Non-negative Integer 0 to 17000	Need-based (FAFSA or WASFA data required). Report all recipients.	No
<u>TERMColegeBoundScholarship</u>	Non-negative Integer 0 to 15000	Need-based (FAFSA data required). Report all recipients.	No
<u>TERMPassporttoCollegeScholarship</u>	Non-negative Integer 0 to 8000	Need-based (FAFSA or WASFA data required). Report all recipients.	No
<u>TERMGETReadyforMathScience</u>	Non-negative Integer 0 to 0	As no new funds have been available, this field should be reported as '0'	No
<u>TERMOppportunityScholarship</u>	Non-negative Integer 0 to 12000	Need-based (FAFSA data optional). Report all recipients.	No
<u>TERMSBCTCOppportunityGrant</u>	Non-negative Integer 0 to 10000	Need-based (FAFSA data optional). Report all recipients.	No
<u>TERMOtherStateFundedGiftAssistance</u>	Non-negative Integer 0 to 99999	Need-based (FAFSA or WASFA data optional). Report all recipients.	No
<u>TERMONCampusStateWorkStudy</u>	Non-negative Integer 0 to 99999	Need-based (FAFSA or WASFA data required). Report all recipients.	No
<u>TERMOffCampusStateWorkStudy</u>	Non-negative Integer 0 to 99999	Need-Based (FAFSA or WASFA data required). Report all recipients.	No
<u>TERMWorkForceTrainingFunds</u>	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
<u>TERMNeedBasedInstitutionalGiftAid</u>	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
<u>TERMNonNeedBasedInstitutionalGiftAid</u>	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
<u>TERMinstitutionalEmployment</u>	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No

Appendix B

Field/Column Header Name	Valid Inputs	Remarks	Changes?
<u>TERMInstitutionalLoans</u>	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
<u>TERMConditionalLoans</u>	Non-negative Integer 0 to 99999	Non-need based, with exception of Teacher Shortage Conditional Grant, which is a need-based program. Only report students who are also need-based recipients.	<u>Yes</u>
<u>TERMPrivateLoans</u>	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
<u>TERMOtherLoans</u>	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
<u>TERMOutsideScholarships</u>	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
<u>TERMOtherAgencyAssistance</u>	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 duplicated on multiple rows.
- Institution Student ID is not blank and 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
 - EnrollmentStatus (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 '12/31/2019'). If commas are included in the dates, enclose the data in quotes.

Detailed Data Edit Errors

Edit	Overrideable
College Bound Scholarship Award Differs from CSAW	X
College Bound Scholarship Award Not Found In CSAW	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
Fall term Enrollment Status cannot be Not Enrolled when Fall term aid has been reported	X
Family Income Does Not Match CSAW Record	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
Opportunity Scholarship Recipient Not a State Resident	
Passport To College Scholarship Award Differs from WSAC Records	X
Passport To College Scholarship Award Not Found in WSAC Records	X
Passport To College Scholarship Recipient Not a State Resident	

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Edit	Overrideable
Spring term Enrollment Status cannot be Not Enrolled when Spring term aid has been reported	X
SSN Does Not Appear To Be a Valid Number	X
State Need Grant Award Differs from CSAW	X
State Need Grant Award Not Found In CSAW	X
State Need Grant Recipient Not A State Resident	
State Work Study Not A State Resident	
Student Not Enrolled	X
Sum of family size and number in college must match CSAW	X
Summer 1 term Enrollment Status cannot be Not Enrolled when Summer 1 term aid has been reported	X
Summer 2 term Enrollment Status cannot be Not Enrolled when Summer 2 term aid has been reported	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

Appendix C

Edit	Overrideable
Total WorkForce Training Funds Outside Expected Range	X
Total SBCTC Opportunity Grant Outside Expected Range	X
Winter term Enrollment Status cannot be Not Enrolled when Winter term aid has been reported	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 (now Washington STEM; previously CSF)	OpportunityScholarship
Company scholarships	OutsideScholarships
Conditional awards in special education	ConditionalLoans
Dependent Child Care	StateNeedGrant
Early Achievers Opportunity Grant	OtherStateFundedGiftAssistance
Educator ReTooling	ConditionalLoans
Education and Training Voucher (ETV)	OtherAgencyAssistance
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
GET Prepaid Tuition amounts	NOT TO BE REPORTED IN URR
GET Ready for Math & Science	GETReadyforMathScience

Appendix D

Financial Aid Program	Unit Record Report Field Name
Global Opportunity Grant (UW only)	OtherStateFundedGiftAssistance
Governors' Scholarship (from CSF)	OutsideScholarships
Grad PLUS Loans	FederalGradPLUSLoans
Graduate Tuition Waivers	NeedBasedInstitutionalGiftAid or NonNeedBasedInstitutionalGiftAid
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 Washington STEM – previously 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
Pipeline for Paraeducators Conditional Scholarship	ConditionalLoans
PLUS Loans	FederalGradPLUSLoan or FederalParentPLUSLoan
PREP loans	PrivateLoans
Private loans	PrivateLoans
Private scholarships	OutsideScholarships

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Financial Aid Program	Unit Record Report Field Name
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
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
Teacher Shortage Conditional Grant	ConditionalLoans
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 College Bound Scholarship	CollegeBoundScholarship
Washington Scholars	OtherStateFundedGiftAssistance
Washington State Achievers Scholarship	OutsideScholarships
Washington State Opportunity Scholarship (from Washington STEM – previously 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	WorkForceTrainingFunds

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
	Educator ReTooling
	Future Teachers Conditional Scholarship
	Other conditional loans not reported elsewhere
FederalGradPLUSLoans	Pipeline for Paraeducators Conditional Scholarship
	Teacher Shortage Conditional Grant
	Federal Grad PLUS Loans
FederalNursingHealthLoans	Grad PLUS Loans
	PLUS Loans
FederalNursingScholarships	Federal Nursing Student Loan
	Health professions student loan funds
FederalParentPLUSLoans	Federal nursing and other health professional training scholarships and grants
FederalPellGrant	Federal Parent PLUS Loans
	Parent PLUS Loans
	PLUS Loans
FederalPerkinsLoan	Federal Pell Grant
	Pell Grant
FederalSEOG	Federal Perkins Loan
	Perkins Loan
	Federal SEOG
	Federal Supplemental Educational Opportunity Grant
FederalDirectSubsidizedLoans	SEOG
	Supplemental Educational Opportunity Grant
	Federal Subsidized Stafford Loans
	Federal Direct Subsidized Loans
FederalDirectUnsubsidizedLoans	Stafford Loans (subsidized)
	Subsidized Stafford Loans
	Federal Unsubsidized Stafford Loans
	Federal Direct Unsubsidized Loans
FederalTEACHGrant	Stafford loans (unsubsidized)
	Unsubsidized Stafford loans
FederalWorkStudy	Federal TEACH Grant
GETReadyforMathScience	TEACH Grant
InstitutionalEmployment	Federal Work Study
	GET Ready for Math and Science
	Non-work study institutional & off-campus employment
InstitutionalEmployment	WorkFirst Work Study
	Institutional aid fund disbursed as work

Appendix E

Unit Record Report Field Name	Financial Aid Programs
InstitutionalLoans	Institutional loans
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 (previously with CSF; now with Washington STEM)
	Opportunity Scholarship (from Washington STEM)
	Washington State Opportunity Scholarship (from Washington STEM)

Appendix E

Unit Record Report Field Name	Financial Aid Programs
OtherAgencyAssistance	AmeriCorp
	Bureau of Indian Affairs (BIA) Scholarship
	Chapters 31 and 33 veterans' benefits
	Education and Training Vouchers (ETV)
	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
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
	Global Opportunity Grant (UW only)
	Other state funded gift assistance
	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

Appendix E

Unit Record Report Field Name	Financial Aid Programs
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