

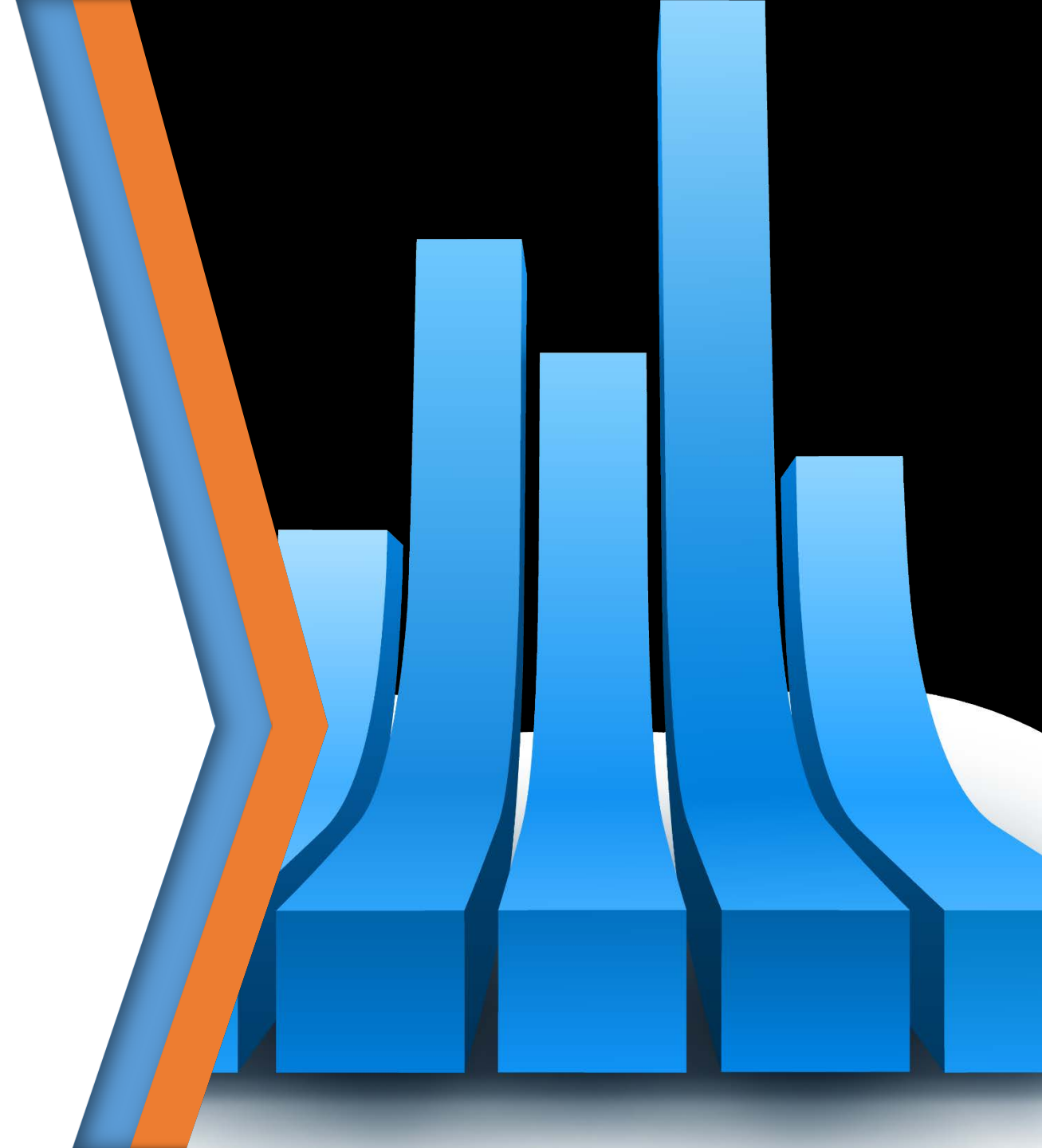


# Unit Record Report

*Submitting the 2018-19 Report  
and SBCTC FAS Update*

Training Webinar Presentation

August 27, 2019





# Webinar Presenters

**Carla Idohl-Corwin**, Senior Associate Director, WSAC

**Becky Phillips**, Product Manager – Financial Aid, SBCTC IT

**Marla Skelley**, Associate Director, WSAC

**Ann Voyles**, Program Associate, WSAC





# Purpose of the Unit Record Report

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



# Timeline

- **URR Manual available electronically:**  
<https://www.wsac.wa.gov/unit-record>
- **August 12:** Unit Record Report (URR) application opens
- **October 7:** Finalized report due
- **October/November:** WSAC analysis
- **December:** Reports to policy makers
- **January 2020:** Institutional profiles available



# Manual Overview

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



# Manual Overview, continued

- **Appendices**

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

- B – Record Layout – File Format and Valid Inputs

- C – System Edits that Prevent File Upload and Import

- D – Quick Lookup by Financial Aid Program

- E – Quick Lookup by Unit Record Report Field Name



# Portal CSV File Submission

- **Building a CSV file for submission**
  - Report only students who received financial aid based on the 2018-19 FAFSA or WASFA year.
  - Report files in CSV format with a header row.
  - Review the field definitions in Chapter 2 of the Manual and the record layout in Appendices B and C to determine valid field content.

# CSV File Creation – CTC Current System

- **SM9738J** – CTC Unit Record job produces the CSV file
  - File includes students who received financial aid during the 2018-19 year
  - File includes header row
- SBCTC-IT works with WSAC to ensure that file is correct format and passes portal file edits





# Reporting Requirements

- **Determine which students to report**
  - Need-Based Recipients – 2018-19 FAFSA or WASFA required.
  - Need-Based Aid Recipients – other programs where FAFSA or WASFA data may or may not be available.
  - Non-Need Based Federal Loan Recipients (i.e., Federal Direct Unsubsidized Loans, Federal Parent PLUS Loans, and Federal Grad PLUS Loans).

*Appendix A in the Manual details these categories*

# Report Selection – CTC Current System

- **SM9738J** selects:
  - 2018-19 Need-Based recipients
  - 2018-19 Non-Need Based Federal Loan Recipients



# Reporting Requirements

- **Need-Based Recipients**

- Intent is to capture all financial aid disbursements in a Unit Record Report.
- Report this year all financial aid received based on filing of the 2018-19 FAFSA or WASFA.
- Report on next year's URR all financial aid received based on the 2019-20 FAFSA or WASFA.



# Programs to Report

- **Need-Based Recipients – FAFSA fields required**

- ☐ Federal Pell Grant
- ☐ Federal SEOG
- ☐ Federal Work Study
- ☐ Federal Direct Subsidized Loan
- ☐ Washington College Grant/  
formerly, State Need Grant\*
- ☐ College Bound Scholarship\*
- ☐ Passport to College Scholarship\*
- ☐ State Work Study (On- and Off-Campus)\*\*
- ☐ Teacher Shortage Conditional Grant\*\*\*
- ☐ Need-Based Institutional Gift Aid

\* **FAFSA or WASFA required**

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

\*\*\* **Program not funded 2018-19 but future funding possible**



# Programs to Report

- **Need-Based Recipients – Other Programs**

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

# Report Detail – CTC Current System

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



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

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

# BFET Detail – CTC Current System

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





# Programs to Report

- **Federal Non-Need Based Loan Recipients**

- Federal Direct Unsubsidized Loan
- Federal Parent PLUS Loan
- Federal Grad PLUS Loan

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



# Changes for the 2018-19 Unit Record Report Portal

- **Refer to Page iii in the Manual**
- **On- and Off-Campus State Work Study**
  - Non-overrideable edit added to the system to prevent non-participating institutions from submitting SWS data without a valid allocation in the Portal.
- **No changes to .CSV header file layout for 2018-19 URR**



# Early Announcement: Changes for the 2019-20 Unit Record Report Portal

- **Field Additions to the .CSV Header File Record Layout**

- ISIR/WASFA Transaction Number (for 2018-19 override edits, enter transaction number in Override Comments box)
- Passport to Careers Apprenticeship Opportunities
- Passport to College Incentive Grant
- WSOS Career and Technical Scholarship
- New Teacher Preparation programs
- Washington Health Corps programs (new branding and sub-programs under former Health Professions programs)



# Early Announcement: Changes for the 2019-20 Unit Record Report Portal, continued:

- **Field Deletions to .CSV Header File Record Layout**
  - Federal Perkins Loan
  - GET Ready for Math and Science
- **Other Revisions to .CSV Header File Record Layout**
  - State Need Grant relabeled to “WCG,” due to transition of State Need Grant program (SNG) to Washington College Grant program

# 2019-20 Required Changes to CSV File

- The required changes to the 2019-20 CSV file will be added to SM9738J next year



## Valid Input Ranges – Changes for 2018-19 \*

Category	Old Value	New Value
Federal Pell Grant	0 to 8880	0 to 9143
Federal Perkins Loan	0 to 12000	0
Passport to College	0 to 8000	0 to 9500

\* Teacher Shortage Conditional Grant – Valid program input zero in current URR; program not funded in 2018-19. No separate field; formerly reported under “ConditionalLoans” in combination with other programs.

# Valid Input Ranges – CTC Current

- The limits for Pell and Teach Grant have been increased to the new limits in the Unit Record Report program (SM9738J)
  - Pell - \$9,143
  - Passport to College - \$9,500



# Reporting Requirements

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





# Reporting Requirements

- **.CSV file requires header row (sample is available)**
- **Financial aid reported for each of five terms:**
  - Summer 1 (used primarily for leader/header awards)
  - Fall
  - Winter (semester schools to report as zeros '0')
  - Spring
  - Summer 2 (used primarily for trailer awards)
  - Clock hour schools may have awards for all 5 terms



# Reporting Requirements

- **When to include summer aid in your reporting**
  - Review Chapter 2 of Manual for detailed information.
  - Summer aid reported are amounts received based on 2018-19 FAFSA or WASFA.
  - In general:
    - Leader/Header schools to report Summer 1 aid (Report Summer 2 as '0')
    - Trailer schools to report Summer 2 aid (Report Summer 1 as '0')
    - Clock hour schools may report aid for both summer terms
  - If recipient enrolled more than one “term” in same summer – report total amount received and enrollment status as one enrollment term.

# Summer Reporting – CTC Current System

- Included awards in **B891** are placed in the Summer 1 location in the CSV file
- Included awards in **B895** are placed in the Summer 2 location in the CSV file



# FAFSA & WASFA Related Fields

- **Fields to also report for 2018-19 FAFSA & WASFA filers**
  - Marital Status
  - Is Dependent
  - Family Size
  - Number in College
  - Family Income
  - Expected Family Contribution (EFC)
  - Cost of Attendance (COA)
  - Need Duration
  - Need Amount

# SPECIAL NOTES ABOUT SELECTED FIELDS





# Social Security Numbers

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



# Year in School

'1' or 'Freshman/1st Year'

'2' or 'Sophomore/2nd Year'

'3' or 'Junior/3rd Year'

'4' or 'Senior/4th Year'

'5' or 'Unclassified/5th Year'

'6' or 'Graduate'

'7' or 'Professional'

'8' or 'Other'

Required for all recipients. Report the status as of the beginning of the term of the recipient's last financial aid disbursement for the 2018-19 year.



# Year in School – Considerations

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



# Year in School – CTC Current System

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



# Family Information \*

- **Family Size**
  - Generally reported from the FAFSA or WASFA
  - Must be 2 or higher for dependent students
  - Must be 1 or higher for independent students
    - If married, must be 2 or higher
- **Number in College**
  - Must be 1 or higher
  - Cannot exceed the Family Size
  - Parents' enrollment in college should not be included unless it was a professional judgment

\* These data elements should align across URR, CSAW, and FAFSA/WASFA.



# Family Income \*

- **Report the Family Income (taxable and untaxed) based on a review of the 2018-19 FAFSA or WASFA**
  - Usually will be the 2016 income from FAFSA or WASFA.
  - If a professional judgment decision was made, report that income.
  - Report integers without dollar signs or cents (e.g., 44010 and -10123).
  - The only place in the file where negative numbers can be used.

\* These data elements should align across URR, CSAW, and, generally, FAFSA/WASFA.

# Family Income – CTC Current System

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



# Expected Family Contribution \*

- **Report the Expected Family Contribution (EFC)**
  - Will be the Federal Methodology (FM) calculation produced by U.S. Department of Education based on the 2018-19 FAFSA, or WASFA, EFC.
    - Report FM EFC if Institutional Methodology produces different EFC
  - May be adjusted by professional judgment decisions.
  - Should reflect the number of months reported in Need Duration.

\*These data elements should align across URR and FAFSA/WASFA unless adjusted for Need Duration less than or greater than nine month regular academic year.



# Cost of Attendance

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



# Need Amount

## **Cost of Attendance**

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

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

# Need Amount – CTC Current System

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





# Need Duration

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



# Term Enrollment Status

Undergraduate Enrollment Status	Credits	Scheduled Clock Hours	URR Codes
Not Enrolled	n/a	n/a	'0' or 'Not enrolled'
Full-Time	12.0 or more	300 or more *	'1' or 'Full time'
Half-Time	6.0 – 8.9	150 – 224	'2' or 'Half time'
Three-Quarter Time	9.0 – 11.9	225 – 299	'3' or '3/4 time'
Less Than Half-Time	3.0 – 5.9	75 – 149	'5' or '< Half time'

\* Typically, clock hour term awards are for full time enrollment status, except that the final term may be paid for part-time enrollment status – unless a student is out of QERs



# Reporting Term Enrollment

## Approximate Term Date Ranges for Clock-Hour Institutions

Term	From	To
Summer 1	July 1, 2018	September 11, 2018
Fall	September 12, 2018	November 22, 2018
Winter	November 23, 2018	February 5, 2019
Spring	February 6, 2019	April 18, 2019
Summer 2	April 19, 2019	June 30, 2019



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

- Report the final awards received by the student.
- The Unit Record Reporting tool checks against CSAW records – This is **Critical** to remember.
- Review the “SNG, CBS, & Passport Differences Report” to verify all recipients and awards are correctly reported.



# Reporting of tuition waiver dollars for SNG and CBS recipients

- Required for 2018-19
  - Accurate representation of all forms of assistance that needy students are receiving.
  - Include the full assessed tuition & fee amounts in each student's Cost of Attendance to reflect tuition prior to application of waiver(s).
  - Report waivers as a financial aid resource in the appropriate field:
    - Need-Based Institutional Gift Aid
    - Non-Need Based Institutional Gift Aid



# State Work Study

- Report on-campus & off-campus employment separately.
- Report students' total gross earnings, including employer match or institutional share.
- Include summer employment.

Report either:

- Actual gross earnings based on monthly cut-off dates or institutional payroll dates.
- Average gross term earnings over the academic year for all terms student was enrolled at least half-time.



# Institutional Gift Aid

## Report Institutional Gift Aid as either:

- Need-Based Institutional Gift Aid – all institutional grants, scholarships, and/or waivers awarded solely or partially on a review of the 2018-19 FAFSA or WASFA.
- Non-Need Based Institutional Gift Aid – all institutional grants, scholarships, and/or waivers awarded without regard to the FAFSA or WASFA (i.e., includes institutional funds awarded to Running Start or non-matriculated students).



# Other State Funded Gift Assistance

**Report sources of state aid not reported elsewhere.**

Examples include:

- American Indian Endowed Scholarship
- Washington Scholars
- Early Achievers Opportunity Grant
- Global Opportunity Grant (UW only)



# Aid Categories – CTC Current System

- Complete list of the aid categories and corresponding Processing Table entry will be included in the SBCTC-IT Unit Record documentation
- Notice will be sent to **Dirfinaid** when the documentation is available and when the 2018-19 **SM9738J** is available

# EDITS



# Edits to Ensure Data Quality

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



# Edits that Prevent File Upload

## Refer to **Appendix C (page 45)** in the **Manual**

Examples of errors that prevent upload:

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

*Be sure to review all 12 items!*



# Non-Overrideable Edit Examples

- **Refer to Appendix C (page 46-48) in the Manual**
  - Total Aid Reported is Zero
  - Non-resident with SNG or other state aid
  - Number in College is greater than Family Size
  - No Valid Institutional SWS Allocation in Portal (new)



# Overrideable Edit Examples

- **Refer to Appendix C (pages 46-48) – Field Content**

- Need Amount is Zero with Need Based Aid.

Budget changed with dropped credits

- Year in School for Aid Type (Federal Grad PLUS Loan).

Student graduated mid-year

- Date of Birth outside normal range.

- Cost of Attendance minus Expected Family Contribution (calculated by the edit program) does not equal Need Amount reported by college.

# Edits in CTC Current System

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



# Reminders

- Keep Override comment(s) concise and to the point, but with sufficient detail to directly address the edit message.
- Report Family Income using SNG income calculation, not federal Total Income field from FAFSA. Should match income reported in CSAW student record for 2018-19.
- In the Override comments, include the FAFSA transaction number used to award the student when addressing URR/CSAW discrepancies related to Family Income, Family Size, Number in College, or Expected Family Contribution.





## Reminders, continued

- Report an adjusted Expected Family Contribution according to Need Duration if student attended less than full time/full year if your standard practice is to do so. Need, COA and duration must all be consistent.
- Report all known Race categories for each student, even where Hispanic Origin is marked 'Y' (eliminates gaps in research data).

# Reminders – CTC Current System

- **CTC URR Basic Steps – Current System**
  - Reconcile awards with expenditure data
  - Run job to post SMS Year in School to FA tab
  - Run job to update academic hours on Academic tab
  - Run job to update Residence status from SMS
  - Run **DataExpress** procedure to determine if award code was used during 2018-19
  - Update CIS/WAT Processing Table

# Reminders, continued – CTC Current System

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



# Tips and Best Practices

- Upload your CSV file early – don't wait for the deadline!
- Review 2018-19 URR Manual and training materials, and test upload using the Portal training environment:

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

(Data entered is temporary; information clears overnight)

- Use URR informational reports to check for consistency & validity.
- CTCs – Review SBCTC 2018-19 URR Manual when available.
- Contact WSAC with questions or problems not addressed in WSAC's URR Manual.

# USING THE WEB APPLICATION



# Lagon to the Portal

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

WSAC Portal - Login

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

**WASHINGTON STUDENT ACHIEVEMENT COUNCIL**  
EDUCATION · OPPORTUNITY · RESULTS

email address

password ([forgot it?](#))

Login

**Middle/High School Staff**  
[Enter College Bound applications](#) for students  
[View FAFSA Completion statistics](#) for public school students  
Request a portal account for:  

- [GEAR UP](#)
- [College Bound Scholarship](#)
- [FAFSA Completion](#)

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

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

**READY SET GRAD**  
**theWashBoard.org**  
**WA529 GET Dream Ahead**  
**GEAR UP WASHINGTON STATE**  
**College Bound Scholarship WASHINGTON**  
**WASHINGTON OPPORTUNITY PATHWAYS**



# URR Portal Submission Tool


In the Programs menu, click on Unit Record.

The screenshot shows the WSAC portal interface. At the top is a blue navigation bar with the following links: Home ▾, Admin ▾, Common ▾, Csaw ▾, and Programs ▾. An orange arrow points to the Programs ▾ link. Below the navigation bar, the main content area has a white background. On the left side of the main content area, there is a dark grey vertical menu with the following options: American Indian, College Bound, Passport, SNG, Teacher, Unit Record, and WA Scholars. An orange arrow points to the Unit Record option. The main content area also contains the following text: **Welcome to the WSAC portal.** This site contains confidential student information on financial aid applicants provided by Washington Student Achievement Council. This site is for use only by authorized WSAC staff, institution staff, employers, and students. This site is not for use by the general public. By logging in to this tool, I acknowledge that my responsibilities include:

- Protecting WSAC data in accordance with the Family Educational Rights and Privacy Act (FERPA).
- Protecting user authentication information from use by unauthorized persons.
- Using WSAC data only for purposes of administering and assisting students with state financial aid programs.



# URR Portal Submission Tool



**Welcome to the Unit Record Report Warehouse!**

**The Process:**

1. Upload your student data file
2. Address any errors in the data and override as necessary
3. Optionally review or add individual student records
4. When the data is complete, review and submit the report

Next: Proceed to Upload

- The welcome screen will appear on your first login.
- From the welcome screen, click “Next: Proceed to Upload.”
- After uploading URR data, you will be taken directly to the current step for subsequent logins: “Ready to Begin,” “In Progress,” or “Submitted.”





# Uploading Data from File

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

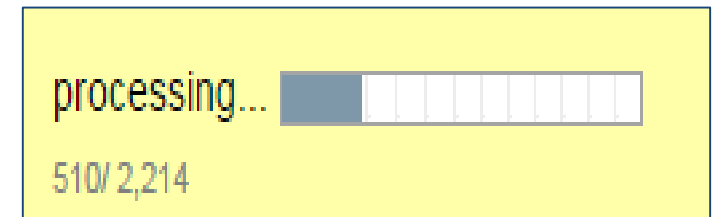
**Large CSV files (over 10MB) should be zipped before uploading.**

No file selected...

Or [Add Students Manually](#)

1

2



- Browse to select a CSV file
- Upload

For large upload files, a progress bar allows the user to see how much of the file has been reviewed for upload errors.



# Uploading Data from File

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

The screenshot shows a light pink error message box. At the top left, an orange arrow labeled "Row #" points to the text "Row #". The main message in red text reads: "This file cannot be saved due to errors. Please correct your file and resubmit." Below this, another line of red text says: "Row 79: Field 'LastName' is required". An orange arrow labeled "Field error name" points to the text "Field 'LastName' is required". At the bottom left of the box is a light blue button with the text "discard file". An orange arrow labeled "Discard button" points to this button.

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



# Uploading Data from File

## Discard Upload button:

- Interrupts upload and deletes the defective file mid-process.
- Alleviates long wait time associated with processing high volume file upload before discard is possible.
- Discard button also remains available at traditional screen intervals.

## Upload Unit Record Data

**Processing file...**

initializing...

discard upload

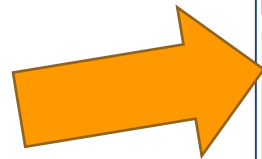




# Uploading Data from File

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

Proceed to edits.



**File Upload Complete!**

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

Proceed to Edits

Discard Upload

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



# Processing Edits

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

processing...

230/ 457

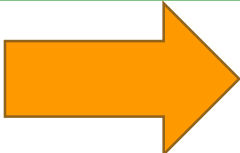
We're currently processing your edits. You may work on resolving edits as we process them. You can also leave this page or log out and come back when processing is complete.

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

### Unit Record Edits

Showing results 1 - 4 of 4

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

refresh



# Processing Edits

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

Last processed on [REDACTED] 4:16:40 PM

[download all edits into csv](#)

[Reprocess Edits](#)


[Delete Upload](#)

[Add a new unit record to the report](#)

## Unit Record Edits

28 errors (21 overrideable - 0 overridden; 0 informational)

Filter by Edit Type


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



# Processing Edits

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

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

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



# Processing Edits

101-11-1111

Adrenaline, Rush A

[Add a new Unit Record](#)

Errors

Fall term Enrollment Status cannot be Not Enrolled when Fall term aid has been reported [+ Override](#)

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

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

Student Demographics and Need

Student Aid

SSN or WASFA Id

101-11-1111

Institution Student Id

Marital Status

Married

Last Name

Adrenaline

First Name

Rush

Middle Name

A

Date of Birth

2/15/1985

Is Dependent

No / false

Year in School

Graduate

Gender

Male

Family Size

4

# Family in College

1

Is State Resident

Yes / true

Need

+ Cost of Attendance

39392

Total Family Income

22122

- Expected Family Contribution

0

Need Duration (months)

9

= Need Amount

39392

Ethnicity/Race

[<<Prev](#)

[Next>>](#)

[Save](#)

[Delete](#)

[Return to the Edit List](#)





# Processing Edits

Edit the data or override with a reason. Click “Save.”

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

**Errors**

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

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

	Summer 1	Fall	Winter	Spring	Summer 2	Total
<b>Enrollment Status</b>	Not enrolled ▾	Not enrolled ▾	Full time ▾	Full time ▾	Full time ▾	
<b>Federal Pell Grant</b>	0	Not enrolled	0	2865	0	5730
<b>Federal SEOG</b>	0	Full time	0	0	0	500
<b>Federal TEACH Grant</b>	0	Half time	0	0	0	0
<b>Federal Nursing Scholarships</b>	0	3/4 time	0	0	0	0
<b>Federal Work Study</b>	0	< Half Time	0	0	0	0
<b>Federal Perkins Loan</b>	0	0	0	0	0	0
<b>Federal Nursing Health Loans</b>	0	0	0	0	0	0
<b>Federal Direct Subsidized Loans</b>	0	0	0	0	0	3500

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



# Processing Edits

- If overriding, enter reason in the pop-up box and click “save.”

Override Unit Record Edit Error

Edit: **State Need Grant Amount Differs From CSAW**

Override Comment -

Save Cancel

- Hover mouse over the information icon to review the override reason.

222-22-2223 Aardvark, Angus

Comment will show here

Errors

State Need Grant Amount Differs From CSAW (CSAW: 0; unit record: 1976) Overridden by

State Need Grant award not found in CSAW

+ Override

Student Demographics and Need Student Aid

	Summer 1	Fall	Winter
Enrollment Status	Full time	Full time	F
Federal Pell Grant	2865	2865	0



# Check for Missing Data Previously Reported in WSAC Records

Click “Show SNG/CBS/PTC differences report” from the Edit page, or, if all edits have been addressed, “Click to Continue.”

Last processed on [REDACTED] 1:47:50 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)

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

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

Filter by Edit Type

Show Informational ☐ Overridden ☒

SSN	Student ID	Last	First	Middle	Error	Overrideable
<a href="#">101111111</a>		Adrenaline	Rush	A	State Need Grant Amount Differs From CSAW (CSAW: 0; unit record: 659)	Overridden




# Check for Missing Data Previously Reported in WSAC Records

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

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

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





# Check for Missing Data Previously Reported in WSAC Records

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

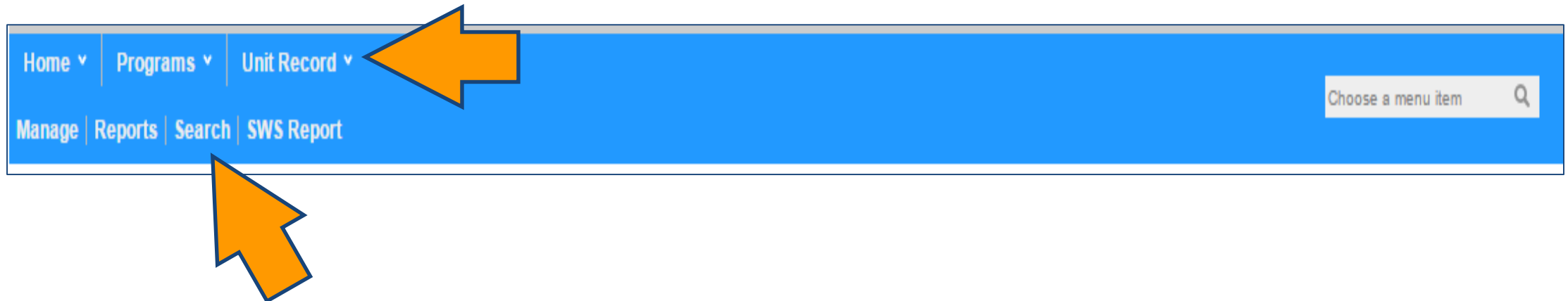
SNG, CBS & Passport Differences Between Unit Record and CSAW. [Go to Edit List](#)

<div>State Need Grant</div> <div>College Bound Scholarship</div> <div>Passport To College</div> <div>Missing SNG Unserved Students</div>						
<div>Download differences to csv</div>						
<u>SSN</u>	<u>Last, First</u>	<u>SID</u>	<u>WSAC Passport</u>	<u>Unit Record</u>	<u>Difference</u>	<u>Override Requested</u>
444-44-4445	Actor, Shakespeare J			<u>\$3,000.00</u>	\$3,000.00	Y
101-11-1111	Adrenaline, Rush A			<u>\$1,500.00</u>	\$1,500.00	



# Edit to Correct or Add Data to an Existing URR Record

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





# Add a Missing Record to the URR Upload

To add a missing student record, go back to the main Edits page and click “Add a new unit record to the report.”

Last processed on [REDACTED] 1:47:50 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 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
<a href="#">101111111</a>		Adrenaline	Rush	A	State Need Grant Amount Differs From CSAW (CSAW: 0; unit record: 659)	Overridden



# Enter Data to Newly Added Record (or Edit an Existing Record)

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

The screenshot shows a web form titled "New Unit Record". At the top, there are two tabs: "Student Demographics and Need" (highlighted in red) and "Student Aid" (highlighted in blue). An orange arrow points to the "Student Demographics and Need" tab. Below the tabs, the form is divided into sections. The first section contains fields for SSN, Institution Student Id, Marital Status (dropdown), Last Name, First Name, Middle Name, Date of Birth (mm/dd/yyyy), Is Dependent (dropdown), Year in School (dropdown), Gender (dropdown), Family Size, # Family in College, and Is State Resident (dropdown). An orange arrow points to the "Student Aid" tab. Below this is a section titled "Need" with a light blue background, containing fields for + Cost of Attendance, Total Family Income, - Expected Family Contribution, Need Duration (months), and = Need Amount. Below that is a section titled "Ethnicity/Race" with a light purple background, containing several dropdowns: Is of Hispanic Origin, Is Asian, Is Black/African American, Is American Indian Alaska Native, Is Native Hawaiian/Pacific Islander, Is White, and Is Other Race. At the bottom right, there are three buttons: "<<Prev", "Next>>", and "Save" (with a checkmark icon). An orange arrow points to the "Save" button.





# Student Aid Screen

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

	Summer 1	Fall	Winter	Spring	Summer 2
Enrollment Status	<input type="text" value="Not enrolled"/>	<input type="text" value="Not enrolled"/>	<input type="text" value="Not enrolled"/>	<input type="text" value="Not enrolled"/>	<input type="text" value="Not enrolled"/>

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

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

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



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

State Need Grant

College Bound Scholarship

Passport To College

**Missing SNG Unserved Students**

Download the .csv file 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; LTHT; or, Not enrolled) in the "Verify" column corresponding only 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 text. 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
██████	██████			Half time		Half time	Half time
██████	██████			Full time		Full time	



# Example of Missing SNG Unserved Report

## Example: Missing SNG Unserved CSV report on download

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	InstitutionName	Academic Year	Ssn	SID	FirstName	MiddleInitial	LastName	Indicate_Yes_ if_All_Terms_ OK	Summer1Unser vedEnrollment	Summer1Verify OrChange	FallUnserved Enrollment	FallVerifyOr Change	WinterUnserved Enrollment	WinterVerify OrChange	SpringUnserved Enrollment	SpringVerify OrChange	Summer2Unser vedEnrollment	Summer2Verify OrChange	Comments_Section
2	Example University	2018-2019	XXXXX1111	STU001	Aaron	N	Andrews		Not enrolled		Full time		Full time		Not enrolled		Not enrolled		
3	Example University	2018-2019	XXXXX2222	STU002	Betty	C	Bradley		Not enrolled		Not enrolled		Not enrolled		Full time		Full time		
4	Example University	2018-2019	XXXXX3333	STU003	Cathy	R	Calthorn		Not enrolled		Not enrolled		Not enrolled		Full time		Full time		
5	Example University	2018-2019	XXXXX4444	STU004	Dean	A	Dandy		Not enrolled		Not enrolled		Full time		Full time		Not enrolled		
6	Example University	2018-2019	XXXXX5555	STU005	Ella	L	Emerson		Not enrolled		Full time		Not enrolled		Not enrolled		Not enrolled		
7	Example University	2018-2019	XXXXX6666	STU006	Fiona	M	Friendly		Not enrolled		Not enrolled		Not enrolled		Full time		Not enrolled		
8	Example University	2018-2019	XXXXX7777	STU007	Greta	V	Grandy		Not enrolled		Not enrolled		Full time		Full time		Full time		
9	Example University	2018-2019	XXXXX8888	STU008	Hettie	A	Harmon		Not enrolled		Full time		Full time		Full time		Not enrolled		
10	Example University	2018-2019	XXXXX9999	STU009	India	L	Indigo		Not enrolled		Full time		Not enrolled		Full time		Full time		
11	Example University	2018-2019	XXXXX0000	STU000	James	C	Jameson		Not enrolled		3/4 time		Not enrolled		3/4 time		Not enrolled		

## Example: Completed Missing SNG Unserved CSV download report with annotations

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	InstitutionName	Academic Year	Ssn	SID	FirstName	MiddleInitial	LastName	Indicate_Yes_ if_All_Terms_ OK	Summer1Unser vedEnrollment	Summer1Verify OrChange	FallUnserved Enrollment	FallVerifyOr Change	WinterUnserved Enrollment	WinterVerify OrChange	SpringUnserved Enrollment	SpringVerify OrChange	Summer2Unser vedEnrollment	Summer2Verify OrChange	Comments_Section
2	Example University	2018-2019	XXXXX1111	STU001	Aaron	N	Andrews		Not enrolled		Full time	< Half time	Full time	Half time	Not enrolled	Full time	Not enrolled		
3	Example University	2018-2019	XXXXX2222	STU002	Betty	C	Bradley	Yes	Not enrolled		Not enrolled		Not enrolled		Full time	Not enrolled	Full time	Not enrolled	
4	Example University	2018-2019	XXXXX3333	STU003	Cathy	R	Calthorn		Not enrolled		Not enrolled		Not enrolled		Full time	Not enrolled	Full time	Not enrolled	
5	Example University	2018-2019	XXXXX4444	STU004	Dean	A	Dandy	Yes	Not enrolled		Not enrolled		Full time		Full time		Not enrolled		
6	Example University	2018-2019	XXXXX5555	STU005	Ella	L	Emerson		Not enrolled		Full time		Not enrolled	Full time	Not enrolled		Not enrolled		
7	Example University	2018-2019	XXXXX6666	STU006	Fiona	M	Friendly		Not enrolled		Not enrolled		Not enrolled		Full time	Half time	Not enrolled		
8	Example University	2018-2019	XXXXX7777	STU007	Greta	V	Grandy		Not enrolled	Half time	Not enrolled		Full time	Not enrolled	Full time	3/4 time	Full time	Full time	
9	Example University	2018-2019	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	2018-2019	XXXXX9999	STU009	India	L	Indigo		Not enrolled		Full time		Not enrolled		Full time	Not enrolled	Full time	< Half time	
11	Example University	2018-2019	XXXXX0000	STU000	James	C	Jameson		Not enrolled		3/4 time	Half time	Not enrolled		3/4 time	3/4 time	Not enrolled		



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

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

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

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

State Need Grant

College Bound Scholarship

Passport To College

**Missing SNG Unserved Students**

Download the .csv file 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; LHT; or, Not enrolled) in the "Verify" column corresponding only 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 text. 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
				Half time		Half time	Half time
				Full time		Full time	



# Submitting the Report

**Address any SSN Mismatches:** If the incorrect SSN originates outside of URR (in CSAW, for example), WSAC assistance is required to correct it. Press “Send an Email” and securely notify WSAC.

Press “Return to the Edit List” or “Search,” make any corrections that originate in the URR, and then “Click to Continue” after all errors have been fixed or overridden.

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

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

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

[State Need Grant](#) [College Bound Scholarship](#) [Report To College](#) [Missing SNG Unserved Students](#)



# Submitting the Report

- Review the preliminary Program Totals Report for missing information or unusual patterns. Download PDF for comparison with January 2020 final.
- Press “Click to Continue” if data appear to be correct.

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

[Click to Continue](#) → [Return to the Edit List](#)

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

Uploaded by  on 7/8/2020

[Create a PDF of this page for your records](#)

(Name of Institution here)

Financial Aid Type	2015-2016 Amount	2016-2017 Amount	2017-2018 Amount	2018-2019 Amount	%Change Current vs Previous	2015-2016 Recipients	2016-2017 Recipients	2017-2018 Recipients	2018-2019 Recipients	% Change Current vs Previous
Federal										





# Submitting the 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 provide these reports to all institutions when the Profile Reports are available for download.

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

[Program Totals Report](#)

Details the total number of all reported students and aid amounts for the last four years.

[Demographic Distribution Reports](#)

Shows student demographic changes for all reported students over the last four years.

[SNG, College Bound & Passport Differences](#)

Show differences between Unit Record data and CSAW.

**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 2020. To view previous year comparison reports, select a previous year from the options shown above..

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

The page at portaltraining says:

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

OK

Cancel



# Before Exiting the URR Portal

- Successful submission brings you to the Confirmation/Reports page.
- Review and print available URR Summary Reports.

Unit Record Report -- Submitted 2018-2019 Institution name here Submitted

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

Uploaded by User name and  
Submitted by date here

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

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

[Program Totals Report](#) Details the total number of all reported students and aid amounts for the last four years.

[Demographic Distribution Reports](#) Shows student demographic changes for all reported students over the last four years.

[SNG, College Bound & Passport Differences](#) Show differences between Unit Record data and CSAW.

**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 2020. To view previous year comparison reports, select a previous year from the options shown above.

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

WSAC Secure Portal

Welcome (Portal user)

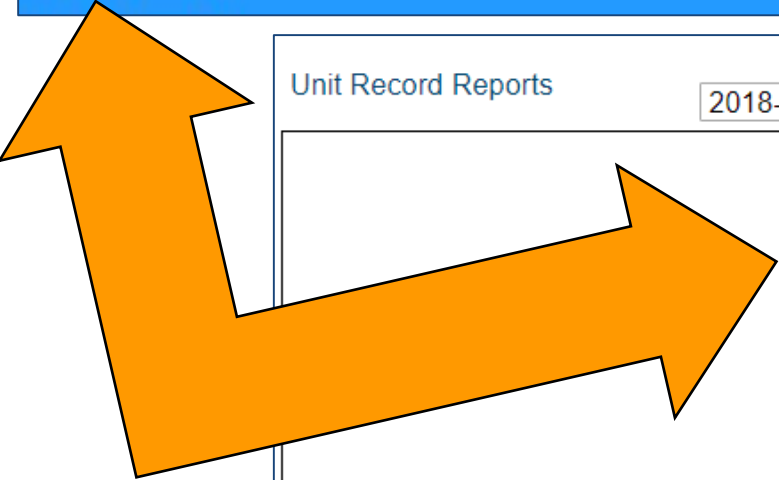
[Logout](#)








# Other URR Summary Reports



Home ▾ | Programs ▾ | Unit Record ▾

Reports | Search

Choose a menu item 

Unit Record Reports

2018-2019

(Name of Institution here)

Submitted

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

[Program Totals Report](#) Details the total number of all reported students and aid amounts for the last four years.

[Demographic Distribution Reports](#) Shows student demographic changes for all reported students over the last four years.

[SNG, College Bound & Passport Differences](#) Show differences between Unit Record data and CSAW.

**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 2020. 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

# Assistance with CTC Current System Issues

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

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



# Where to go for help – WSAC URR Portal Issues

- Review the 2018-19 URR Manual, available online at:  
<https://www.wsac.wa.gov/unit-record>
- Contact Washington Student Achievement Council staff at:  
[unitrecord@wsac.wa.gov](mailto:unitrecord@wsac.wa.gov)

<b>Ann Voyles</b>	<b>Carla Idohl-Corwin</b>	<b>Marla Skelley</b>
360-753-7843	360-753-7847	360-753-7851
<a href="mailto:annv@wsac.wa.gov"><u>annv@wsac.wa.gov</u></a>	<a href="mailto:carlai@wsac.wa.gov"><u>carlai@wsac.wa.gov</u></a>	<a href="mailto:marlas@wsac.wa.gov"><u>marlas@wsac.wa.gov</u></a>