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Unit Record Report

Submitting the 2020-21 Report and SBCTC FAS (Legacy) Update

Training Webinar Presentation

August 24, 2021

Presenters

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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 9:** Unit Record Report (URR) application opens
- **October 11: Finalized report due**
- **October/November:** WSAC analysis
- **December:** Reports to policy makers
- **January 2022:** 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 2020-21 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.

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CSV File Creation – CTC Legacy System

- **SM9738J** – CTC Legacy Unit Record job produces the CSV file
  - File includes students who received financial aid during the 2020-21 year
  - File includes header row
- SBCTC-IT Legacy team 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 – 2020-21 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

Reporting Requirements, continued:

- **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 2020-21 FAFSA or WASFA.
  - Report on next year's URR all financial aid received based on the 2021-22 FAFSA or WASFA.

Report Selection – CTC Legacy System

- **SM9738J** selects:
  - 2020-21 Need-Based recipients
  - 2020-21 Non-Need Based Federal Loan Recipients

Programs to Report, 1 of 3

- **Need-Based Recipients – FAFSA fields required**
  - ❑ Federal Pell Grant
  - ❑ Federal SEOG
  - ❑ Federal Work Study
  - ❑ Federal Direct Subsidized Loan
  - ❑ Washington College Grant*
  - ❑ College Bound Scholarship*
  - ❑ Passport to College Scholarship*
  - ❑ State Work Study (On- and Off-Campus)**
  - ❑ National Guard Grant*
  - ❑ Alternative Routes to Teaching*
  - ❑ Pipeline for Paraeducators*
  - ❑ Teacher Shortage Conditional Grant *
  - ❑ Student Teaching Grant *
  - ❑ Need-Based Institutional Gift Aid

*** FAFSA or WASFA required**

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

Programs to Report, 2 of 3

- **Need-Based Recipients – Other Programs**
  - Federal TEACH Grant
  - Federal Health Professional Scholarships & Grants
  - Federal Health Professional Loans
  - WSOS BA Scholarship (former Opportunity Scholarship)
  - WSOS Career Tech Scholarship
  - Other State Funded Assistance
  - Worker Retraining Program Funds
  - Need-Based Institutional Gift Aid
  - Institutional Employment (if need based)

Programs to Report, 3 of 3

- **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.

Report Detail – CTC Legacy 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 Legacy System

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

Changes for the 2020-21 Unit Record Report Portal,
1 of 3

- **Reporting Category Updates:**
  - Formerly reported in Teacher Conditional Scholarship Programs, these are now to be reported in separate program categories:
    - Alternative Routes to Teaching
    - Pipeline for Paraeducators
    - Teacher Shortage Conditional Scholarship
  - The Student Teaching Grant program continues to be reported in the Teacher Grant Programs category

Changes for the 2020-21 Unit Record Report Portal,
2 of 3

- **New Field Additions to the .CSV Header File Record Layout**
  - Rejected ISIR WASFA
  - National Guard Grant (NGG) *
  - Alternative Routes for Teaching Certification
  - Pipeline for Paraeducators
  - Teacher Shortage Conditional Scholarship
  - VA Benefit

* Schools may experience overrideable edits for NGG as WSAC implements the program Portal payment system

Changes for the 2020-21 Unit Record Report Portal,
3 of 3

- **Field Deletions to .CSV Header File Record Layout**
  - Teacher Conditional Scholarship Programs

- **Refer to Page iii in the Manual for additional details**

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2020-21 Required Changes to CSV File

- The required changes to the 2020-21 CSV file are being added to SM9738J
- There will be additional 'buckets' added to the CIS/WAT Processing Table for the new categories
- Details on the new 'buckets' will be included in the Unit Record Reporting manual when available

Early Announcement: Changes for the 2021-22 Unit Record Report Portal

- **WSOS Graduate Scholarship Program – new program reportable in 2021-22**

- **URR Portal is undergoing overhaul to a new 3.0 version for the 2021-22 reporting cycle. WSAC will reach out to institutions soon to incorporate user comments and feedback as the project moves forward.**

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2021-22 Required Changes to CSV File

- The 2021-22 URR will be the last reporting using the legacy process SM9738J.
- Will be used by DG5 and DG6 colleges
- The required changes to the 2021-22 CSV file will be added to SM9738J next year
- New system award codes/FAPCs will be added for the new aid programs if needed

Valid Input Ranges – Changes for 2020-21

Category	Old Value	New Value
Pell Grant	0 to 9293	0 to 9518
Passport to College Scholarship	0 to 6750	0 to 6667
National Guard Grant	n/a	0 to 11540
Alternative Routes to Teaching	n/a	0 to 8000
Pipeline for Paraeducators	n/a	0 to 4000
Teacher Shortage Conditional Scholarship	n/a	0 to 8000
Teacher Grant Programs	0 to 10000	0 to 8000
WSOS Career Technical Scholarship	0 to 6000	0 to 10000
VA Benefit	n/a	0 to 99999

Washington College Grant Apprenticeships will not be separately reported for 2020-21. Include these funds in the Washington College Grant category.

Valid Input Ranges – CTC Legacy System

- The limits for these categories have been increased to the new limits in the Unit Record Report program (SM9738J)

Reporting Requirements, 1 of 3

- **For all financial aid recipients reported**
  - 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
  - Required fields:
    - SSN
    - First Name
    - Last Name
    - Gender
    - Is State Resident
    - Year In School
    - Rejected ISIR WASFA
    - Enrollment Status per term
    - Financial Aid per term – even if '0'

Reporting Requirements, 2 of 3

- **.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, 3 of 3

- **When to include summer aid in your reporting**
  - Review Chapter 2 of Manual for detailed information.
  - Summer aid reported are amounts received based on 2020-21 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 Legacy System

- Included awards in **C011** are placed in the Summer 1 location in the CSV file

- Included awards in **C015** are placed in the Summer 2 location in the CSV file

FAFSA & WASFA Related Fields

- **Fields to also report for 2020-21 FAFSA & WASFA filers**
  - ISIR/WASFA Transaction #
  - Rejected ISIR/WASFA
  - Marital Status
  - Is Dependent
  - Family Size
  - Number in College
  - Family Income
  - Expected Family Contribution (EFC)
  - Cost of Attendance (COA)
  - Need Duration
  - Need Amount

FAFSA and WASFA Related Fields – CTC Legacy System

- Required fields for 2020-21 FAFSA & WASFA filers are included in CSV file

SPECIAL NOTES ABOUT SELECTED FIELDS

Social Security Numbers

- Duplicates are not accepted.
  - Files containing duplicate SSNs will not upload.
- Invalid SSN sequences are flagged. Don't use "dummy" numbers
- SSNs of WA College Grant and College Bound Scholarship recipients will be compared to the SSNs reported in the WCG/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'	Required for all recipients. Report the status as of the beginning of the term of the recipient's last financial aid disbursement for the 2020-21 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'	

Year in School – Other 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.

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Year in School – CTC Legacy System

- Run **SM9146J** – Post SM Grade Level to FAID/Credit job prior to running **SM9738J**
  - SM9146J looks at SM database for colleges on Legacy system
  - SM9146J looks at cloned database (contains PS data) for colleges in Dual Processing

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Year in School – CTC Legacy System, continued

- 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 2020-21 FAFSA or WASFA**
  - Usually, will be the 2018 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.

** Ensure changes are submitted through federal processor or WASFA, and update CSAW record.

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Family Income – CTC Legacy 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)**
  - Use the Federal Methodology (FM) calculation produced by U.S. Department of Education based on the 2020-21 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

- Expected Family Contribution

= Need Amount

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

Need Amount – CTC Legacy System

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

  - Error message generated is 'Need Amount Invalid'

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 QER

Reporting Term Enrollment

Approximate Term Date Ranges for Clock-Hour Institutions

Term	From	To
Summer 1	July 1, 2020	September 11, 2020
Fall	September 12, 2020	November 22, 2020
Winter	November 23, 2020	February 5, 2021
Spring	February 6, 2021	April 18, 2021
Summer 2	April 19, 2021	June 30, 2021

WA College Grant, College Bound Scholarship, and Passport to College

- Report the final awards and enrollment levels of student at time of disbursement.
- The Unit Record Reporting tool checks against CSAW records.
- Review the "WCG, CBS, & Passport Differences Report" to verify all recipients and awards are correctly reported.

Reporting of tuition waiver dollars for WCG and CBS recipients

- Required for 2020-21
  - 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 2020-21 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
- Early Achievers Opportunity Grant
- Global Opportunity Grant (UW only)
- Gold Star Book Stipend
- Student Emergency Assistance Grant (SEAG)
- Supporting Students Experiencing Homelessness (SSEH) Pilot
- Washington Award for Vocational Excellence (WAVE)
- Washington Scholars

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Aid Categories – CTC Legacy System

- Complete list of the aid categories and corresponding Processing Table entry will be included in the SBCTC-IT Legacy Unit Record documentation

- Notice will be sent to **Dirfinaid** when the documentation is available and when the 2020-21 **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 47) in the Manual

Examples of errors that prevent upload:

- Header row missing or invalid
- Duplicate SSNs
- Invalid codes
- Blanks reported in required fields
  - Beginning 2020-21, new RejectedISIRWASFA is a required field

Be sure to review all 12 items!

Non-Overrideable Edit Examples

- **Refer to Appendix C (page 48-50) in the Manual**
  - Total Aid Reported is Zero
  - Non-resident with WCG or other state aid
  - Number in College is greater than Family Size
  - No Valid Institutional SWS Allocation in Portal

Overrideable Edit Examples

- **Refer to Appendix C (pages 48-50) – 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, changed to graduate status the following term
  - 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.

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Edits in CTC Legacy System

- Edits in **SM9738J** follow 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) brief, but with sufficient detail to directly explain the edit response.
- Report Family Income using WCG income calculation, not federal Total Income field from FAFSA. Should match income reported in CSAW student record for 2020-21.
- The FAFSA/WASFA transaction number reported is the most recent used to award the student, not necessarily the last one filed. This field used to compare FAFSA/WASFA to 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 Legacy System

- **CTC URR Basic Steps – Legacy System**
  - Reconcile awards with expenditure data
  - Run the job to post Year in School to FA tab
    - Legacy colleges uses SMS data; Dual Processing colleges uses cloned database with PS data
  - Run the job to update academic hours on Academic tab
  - Run the job to update Residence status from SMS
  - Run the **DataExpress** procedure to determine if award code was used during 2020-21

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Reminders – CTC Legacy System, continued

- **CTC URR Basic Steps** (continued)
  - Update CIS/WAT Processing Table
  - 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 2020-21 URR Manual and training materials, and test upload using the Portal training environment:

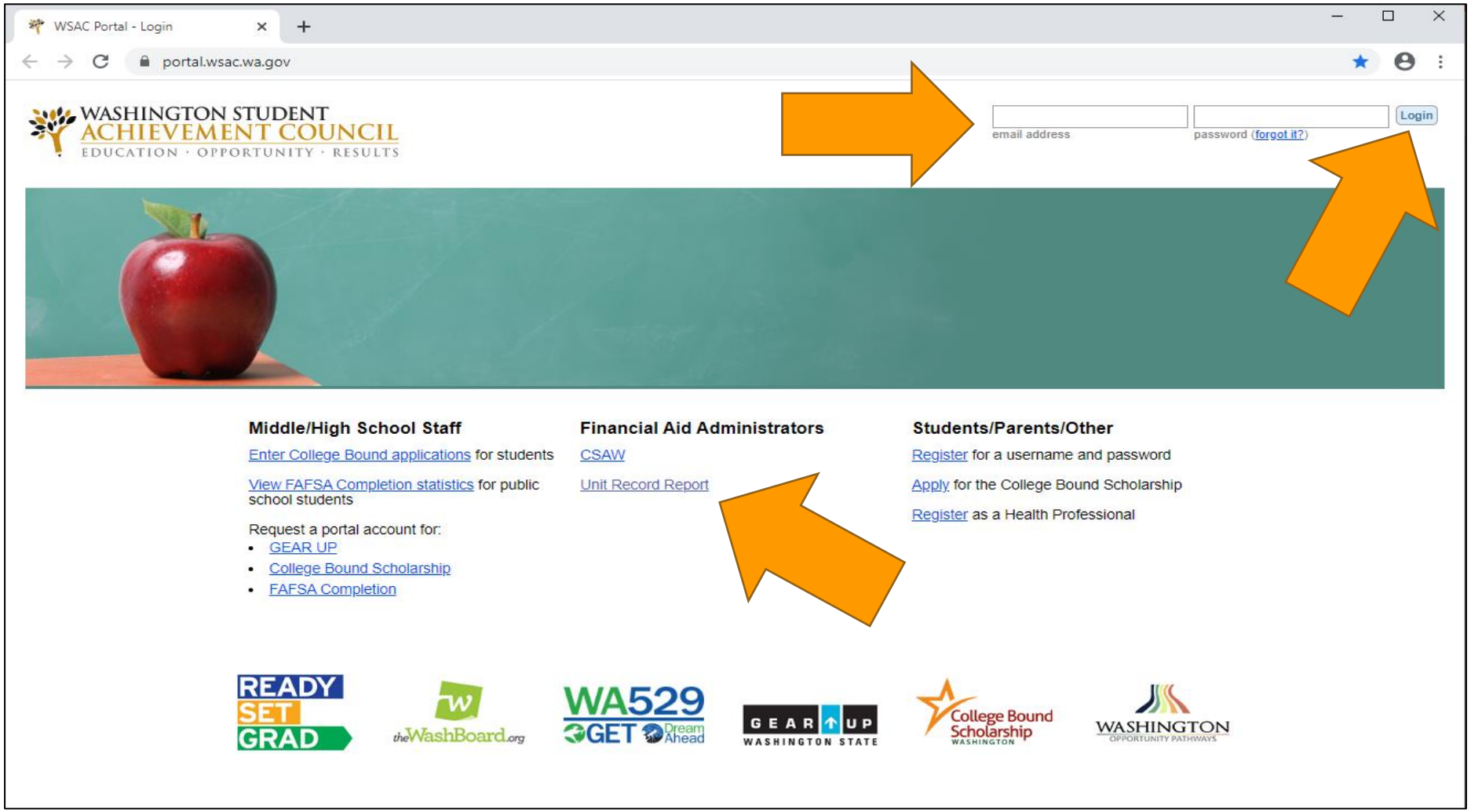
https://portaltraining.wsac.wa.gov/

(Data entered is temporary; information clears overnight)

- Use URR informational reports to check for consistency & validity.
- CTCs – Review SBCTC 2020-21 Unit Record Report manual when available.
- Contact WSAC with questions or problems not addressed in WSAC's URR Manual.

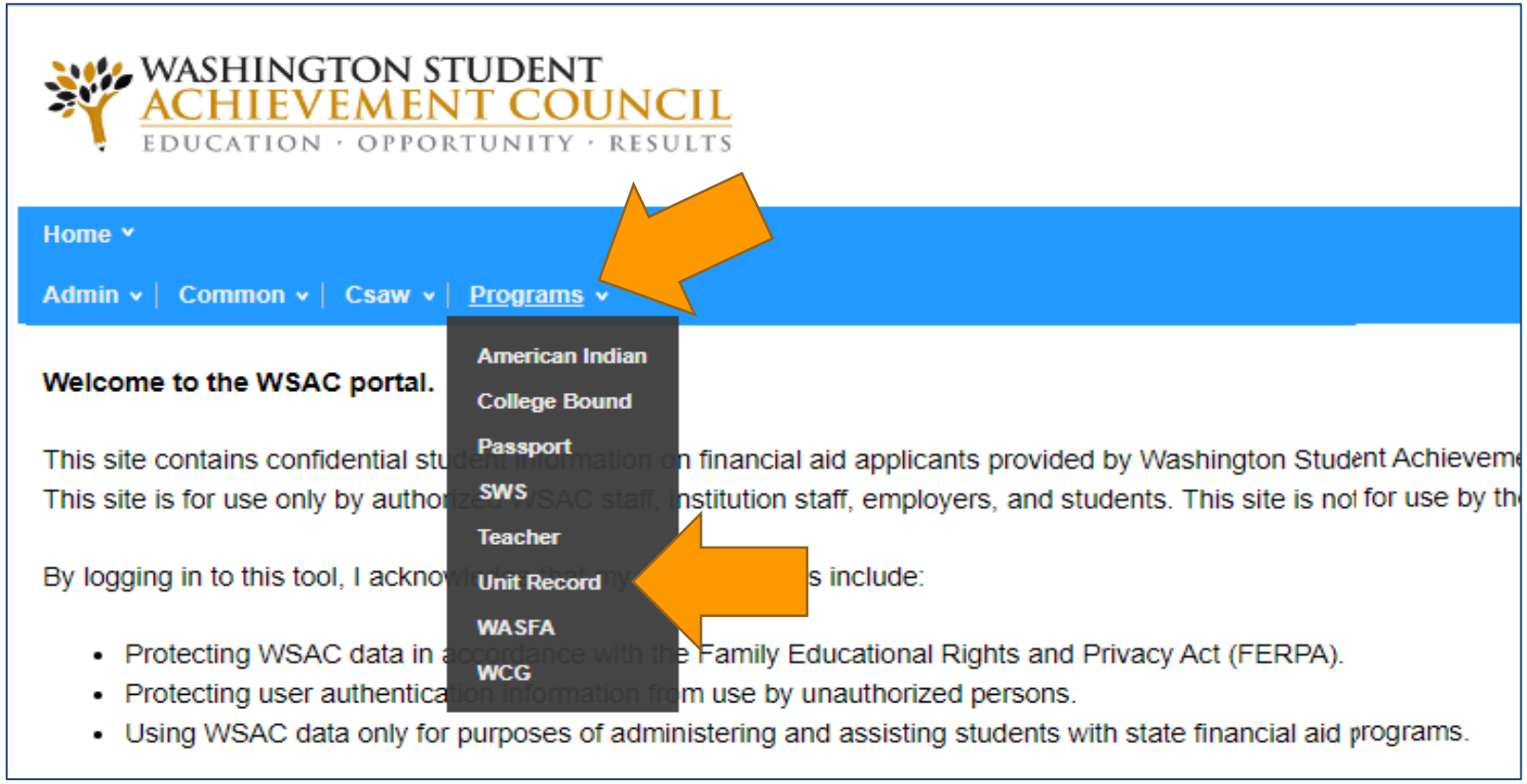
USING THE WEB APPLICATION

Logon to the Portal https://portal.wsac.wa.gov/

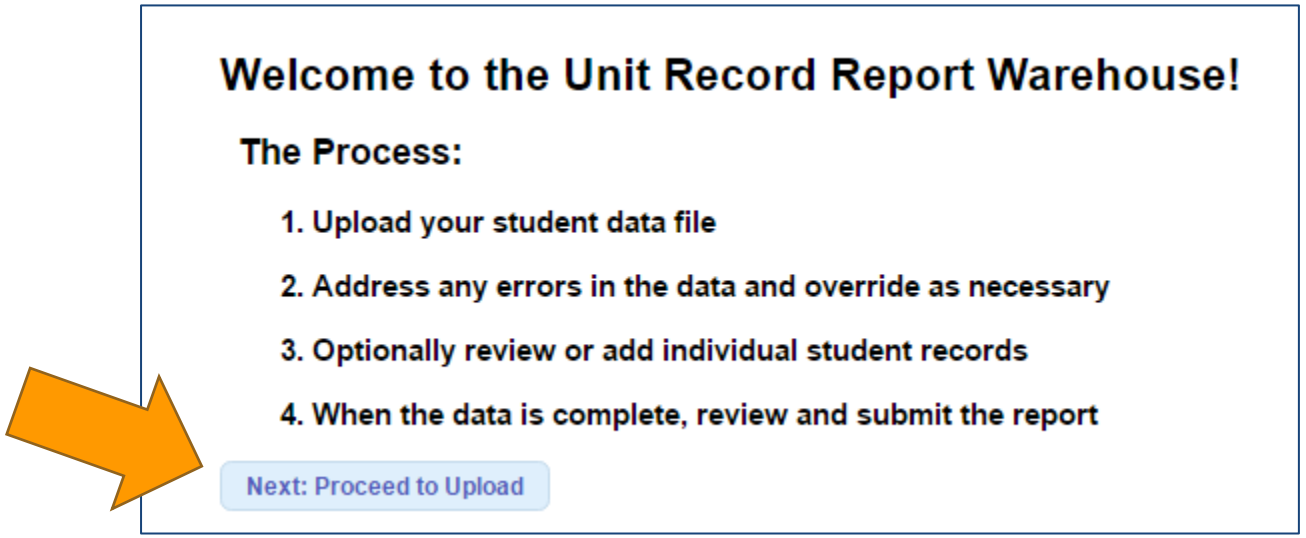


URR Portal Submission Tool

In the Programs menu, click on Unit Record.

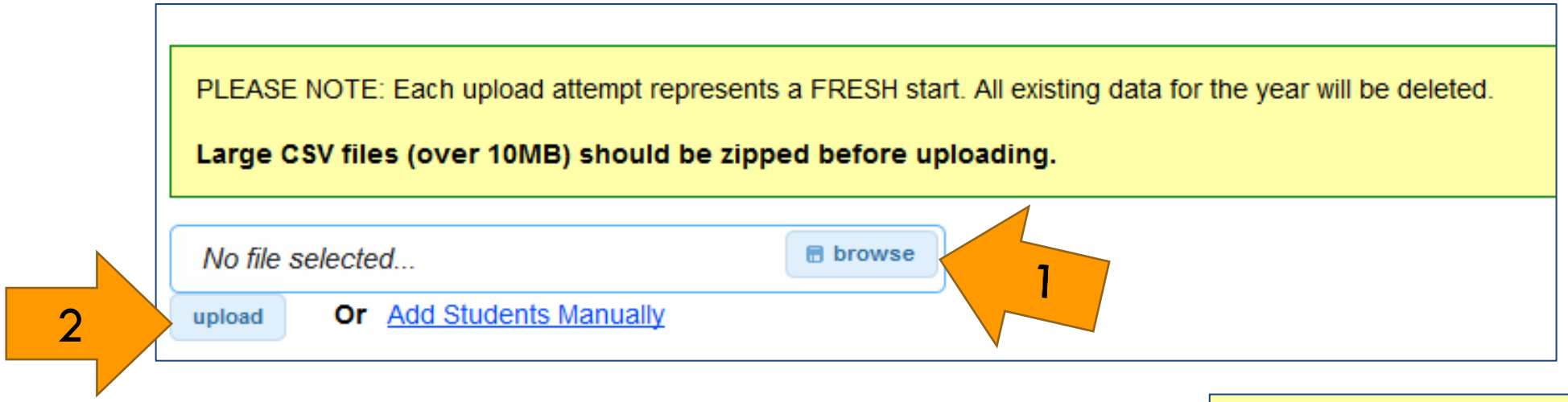


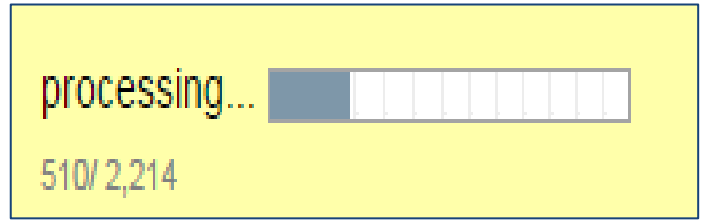
URR Portal Submission Tool, continued:



- 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, 1 of 4



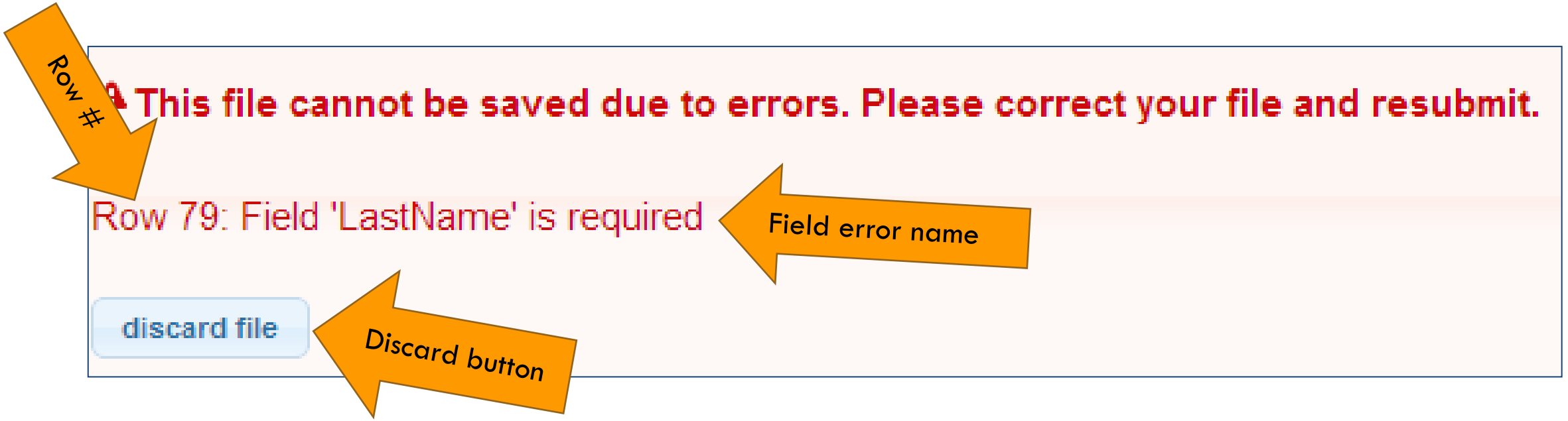


- Browse your PC to select a CSV file
- Click Upload

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, 2 of 4

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

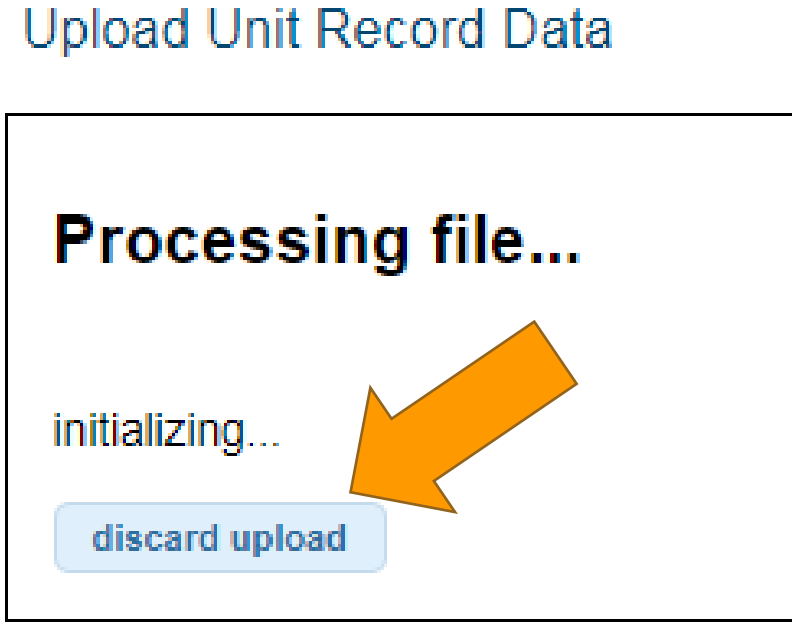


Discard the file, correct the error, and re-upload.

Uploading Data from File, 3 of 4

Discard Upload button:

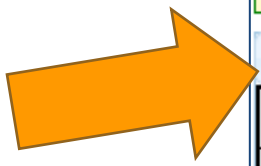
- Interrupts upload and deletes the defective file mid-process.
- Alleviates long wait time associated with processing high volume file upload before discard is possible.
- Discard button also remains available at traditional screen intervals.



Uploading Data from File, 4 of 4

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

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

Processing Edits, 1 of 6

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.

refresh

Unit Record Edits

Showing results 1 - 4 of 4

SSN	Student ID	Last	First	Middle	Error	Overridable
999999559	Stu0484	Smith	A		Student not Enrolled	Overrideable
999999560	Stu0483	Johnson	D	D	College Bound Scholarship award not found in WSAC records	Overrideable

Processing Edits, 2 of 6

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

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

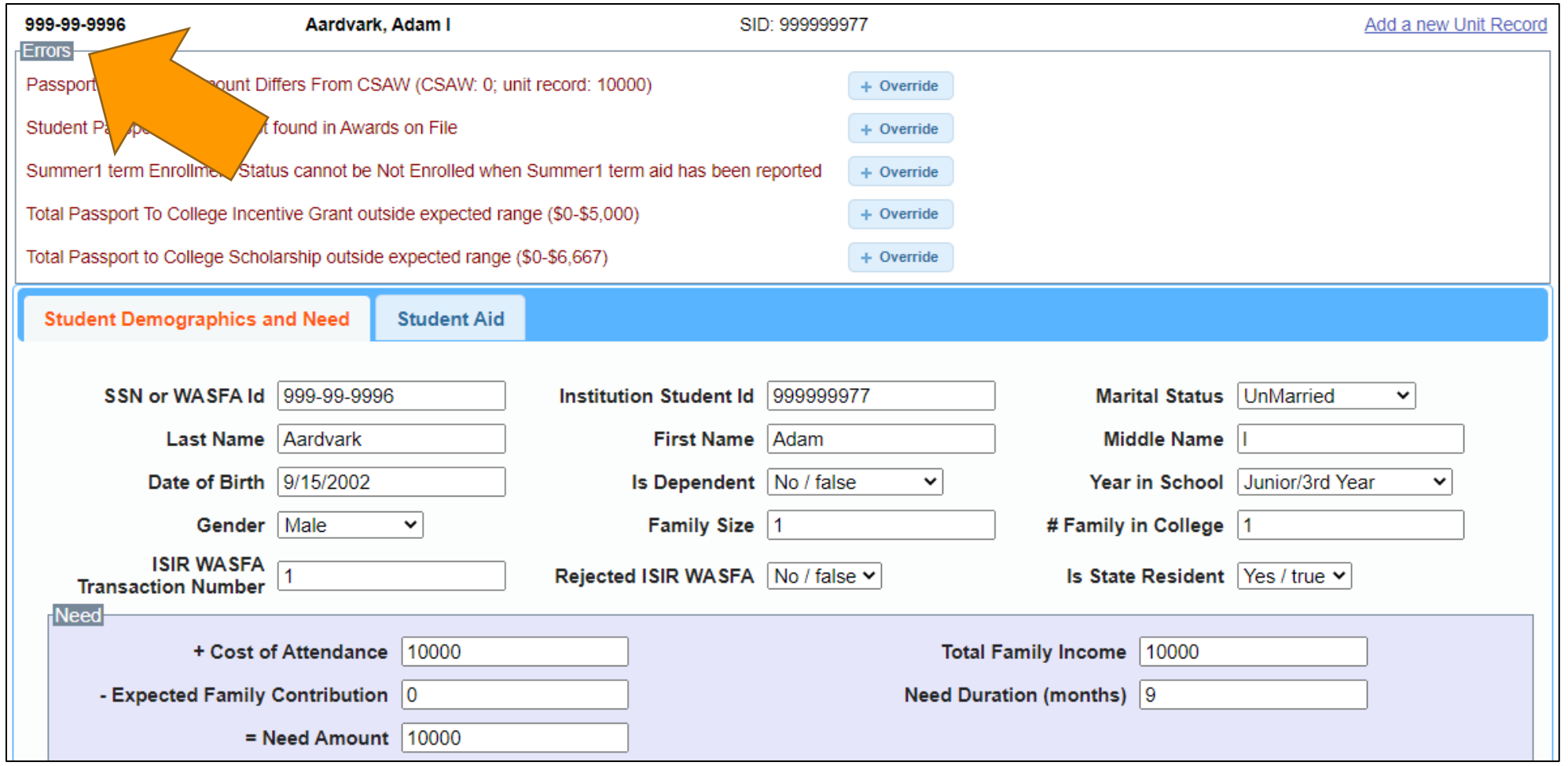
Processing Edits, 3 of 6

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.

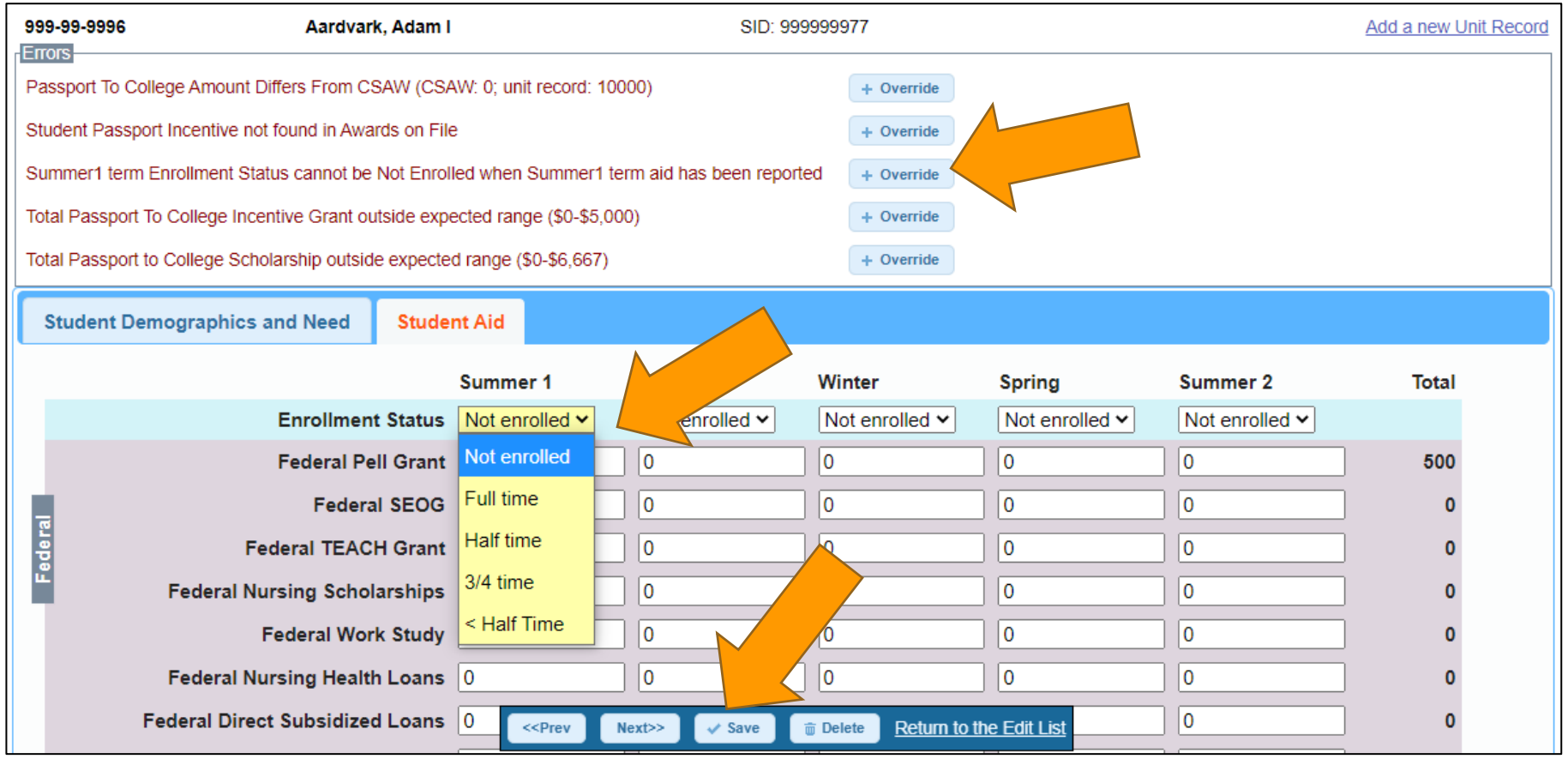
SSN	Student ID	Last	First	Middle	Error	Overrideable
999999955	STU0484	Smith	K		Date Of Birth outside expected range	Overridden
999999955		Smith	K		Student Id Number must be at least 9 characters for publics	Overrideable
999999955	STU0484	Smith	K		Student not Enrolled	Overrideable
999999955	STU0484	Smith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

Processing Edits, 4 of 6

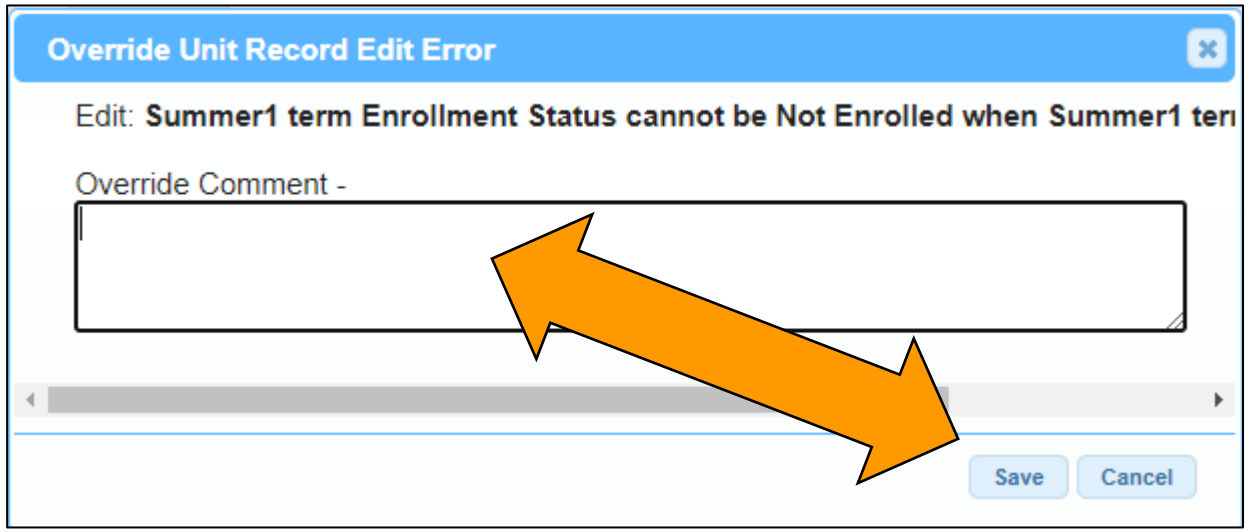


Processing Edits, 5 of 6

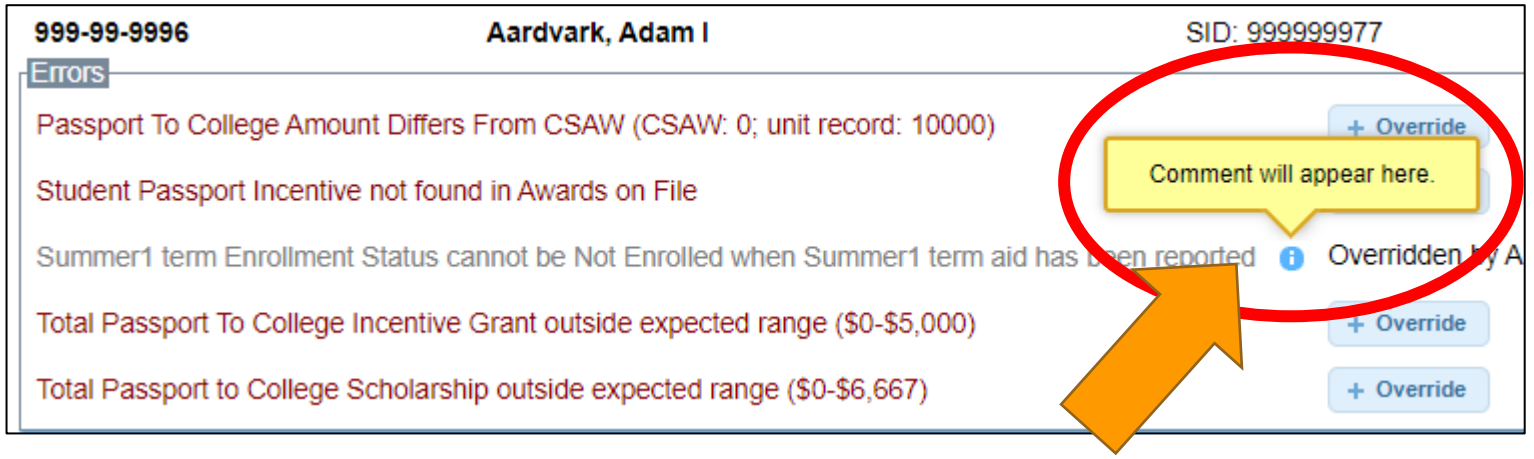
Edit the data or override with a reason. Click "Save."



Processing Edits, 6 of 6

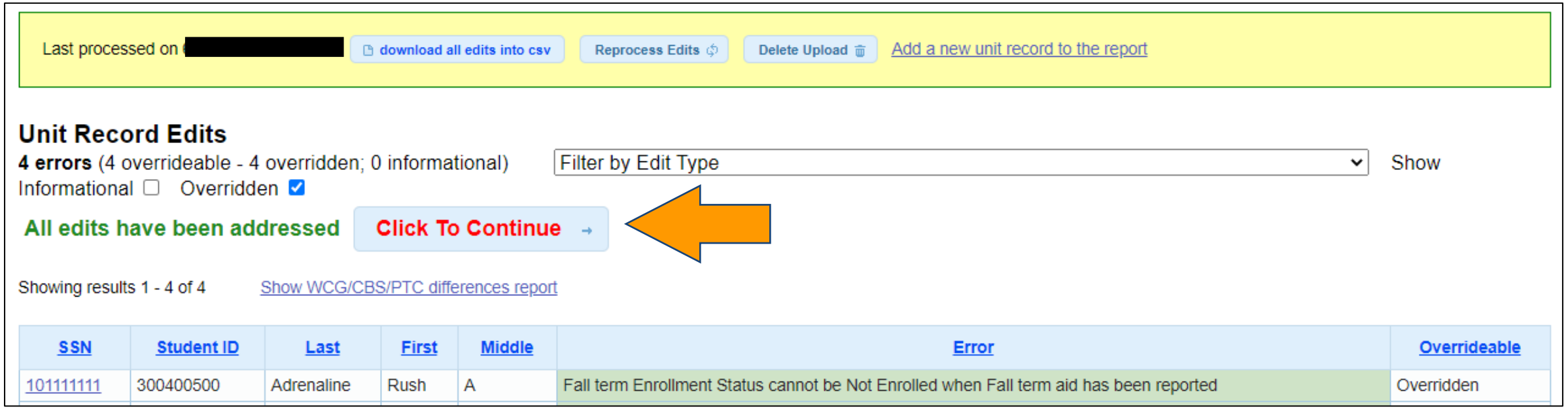


- If overriding, enter reason in the pop-up box and click "save."
- Hover mouse over the information icon to review the override reason.



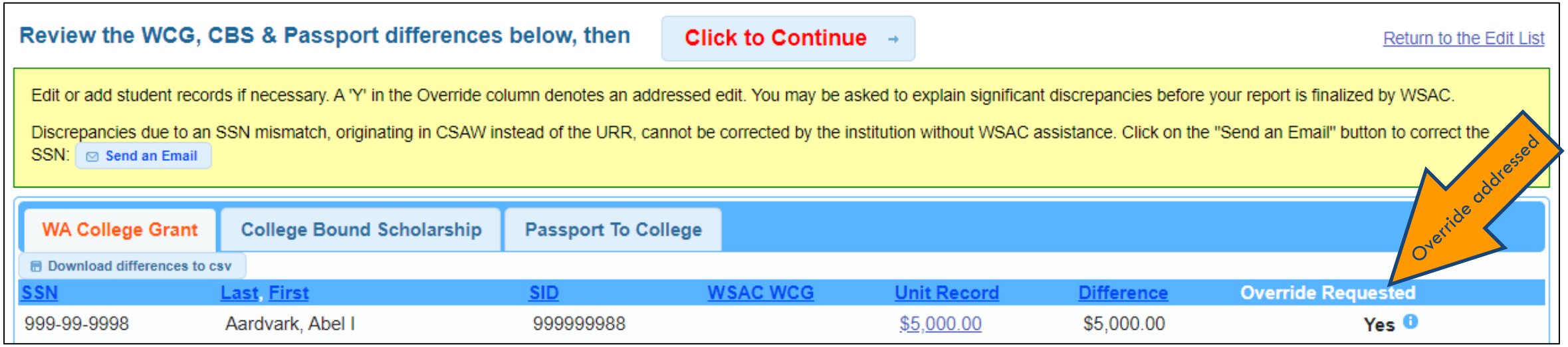
Check for Missing Data Previously Reported in WSAC Records, 1 of 3

When you have addressed all edits, "Click to Continue."



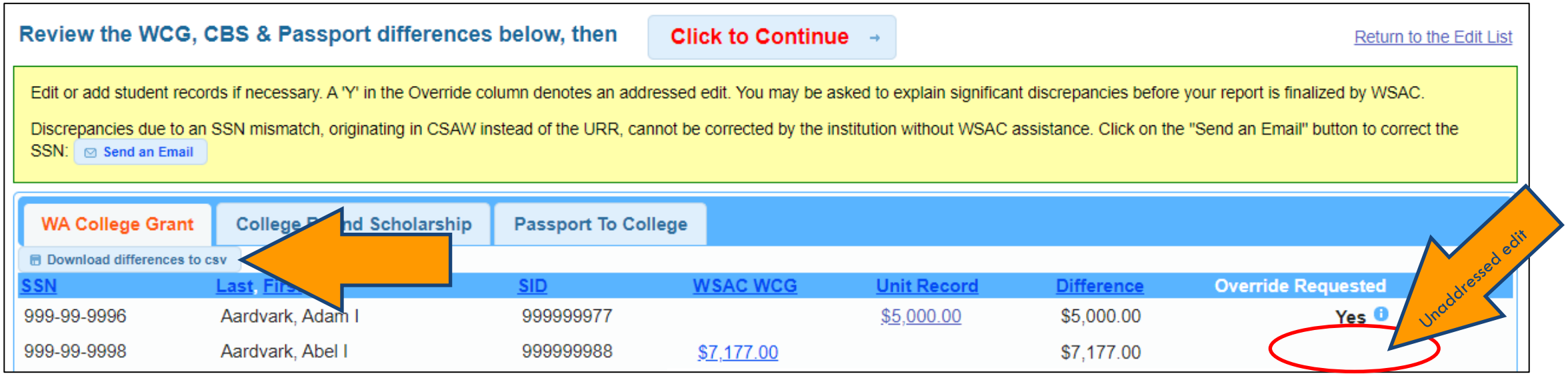
Check for Missing Data Previously Reported in WSAC Records, 2 of 3

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



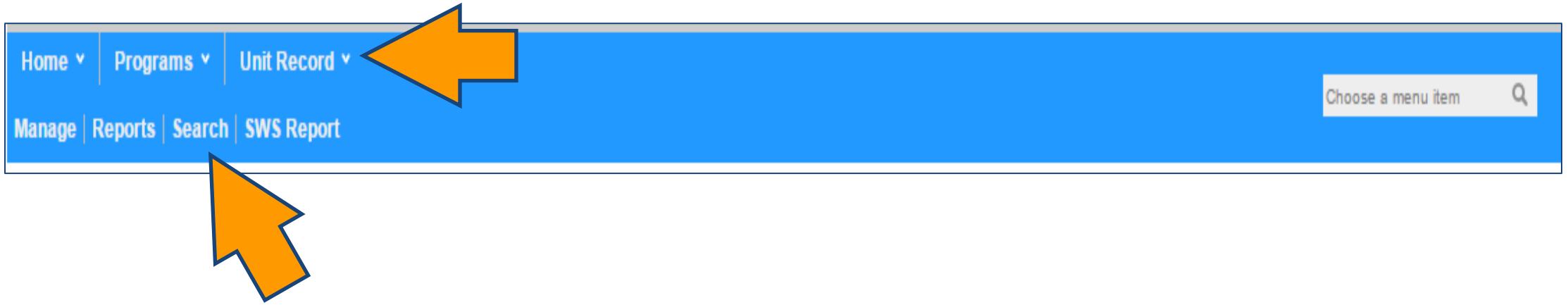
Check for Missing Data Previously Reported in WSAC Records, 3 of 3

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.



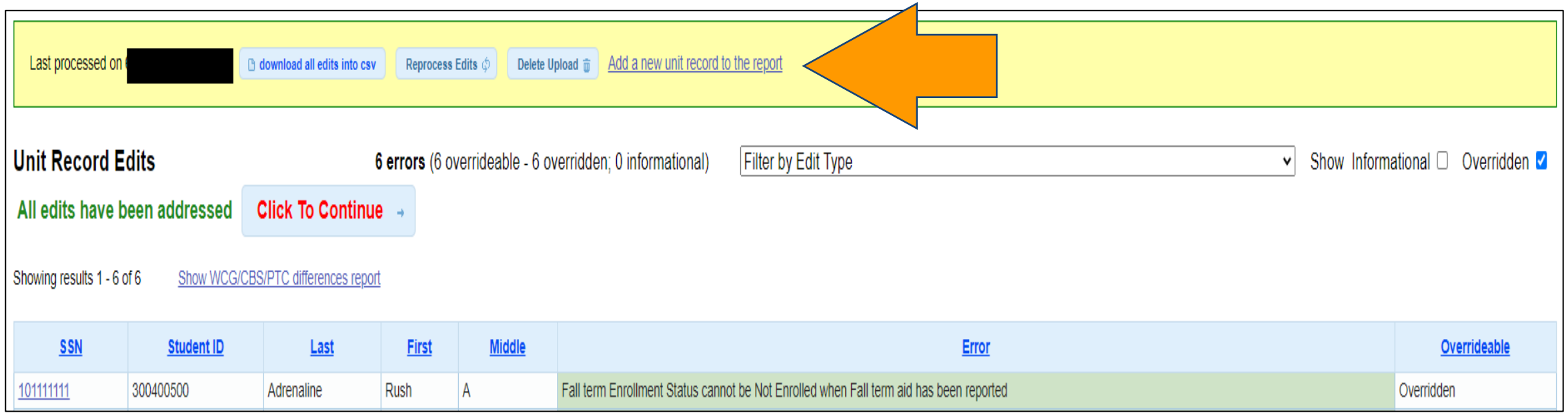
Edit to Correct or Add Data to an Existing URR Record

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



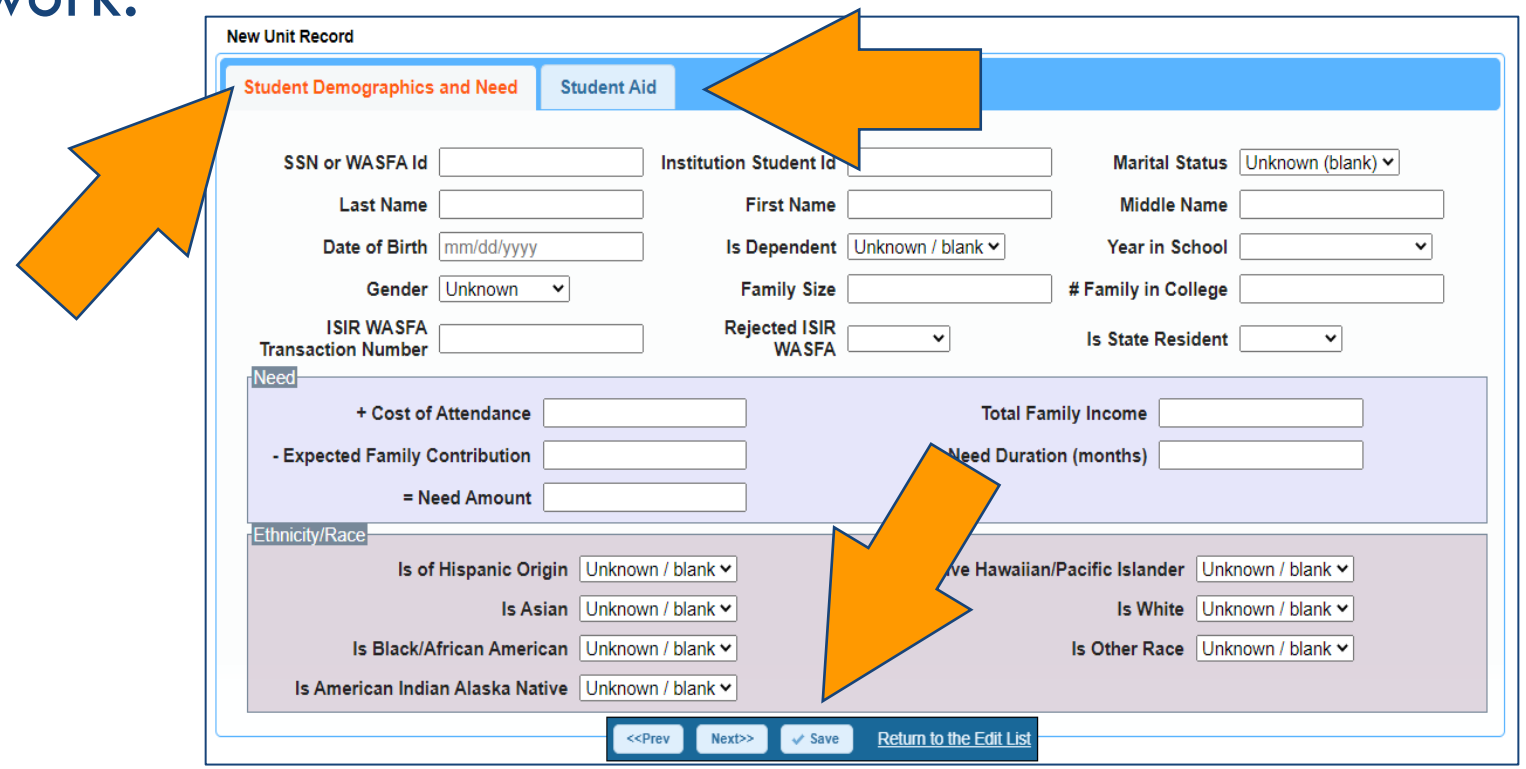
Add a Missing Record to the URR Upload

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



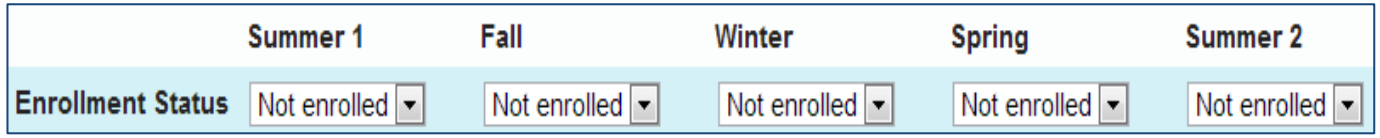
Enter Data to Newly Added Record (or Edit an Existing Record)

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.



Student Aid Screen

All aid must be reported by term. If the term is not applicable, report "Not enrolled" and '0' funding (typically).



Federal

- Federal Pell Grant
- Federal SEOG
- Federal TEACH Grant
- Federal Nursing Scholarships
- Federal Work Study
- Federal Nursing Health Loans
- Federal Direct Subsidized Loans
- Federal Direct Unsubsidized Loans
- Federal Parent PLUS Loans
- Federal Grad PLUS Loans

State

- WA College Grant
- WCG Apprenticeship
- College Bound Scholarship
- Passport to College Scholarship
- Passport to College Incentive Grant
- National Guard Grant
- Alternative Routes
- Paraeducator
- Teacher Shortage Conditional Scholarship
- Teacher Grant Programs
- WSOS BA Scholarship
- WSOS Career Tech
- SBCTC Opportunity Grant
- Other State Funded Gift Assistance
- On Campus State Work Study
- Off Campus State Work Study
- WorkForce Training Funds

Institution

- Need Based Institutional Gift Aid
- Non-Need Based Institutional Gift Aid
- Institutional Employment
- Institutional Loans

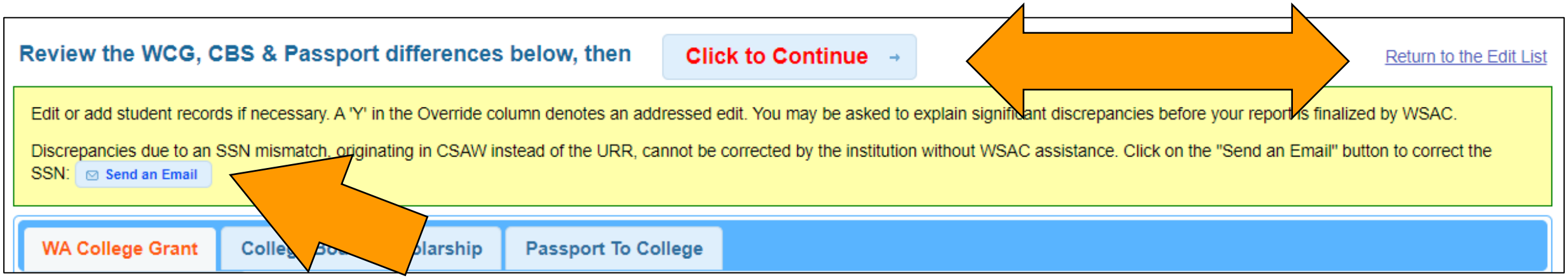
Other

- Conditional Loans
- Private Loans
- Other Loans
- Outside Scholarships
- VA Benefit
- Other Agency Assistance

Submitting the Report, 1 of 3

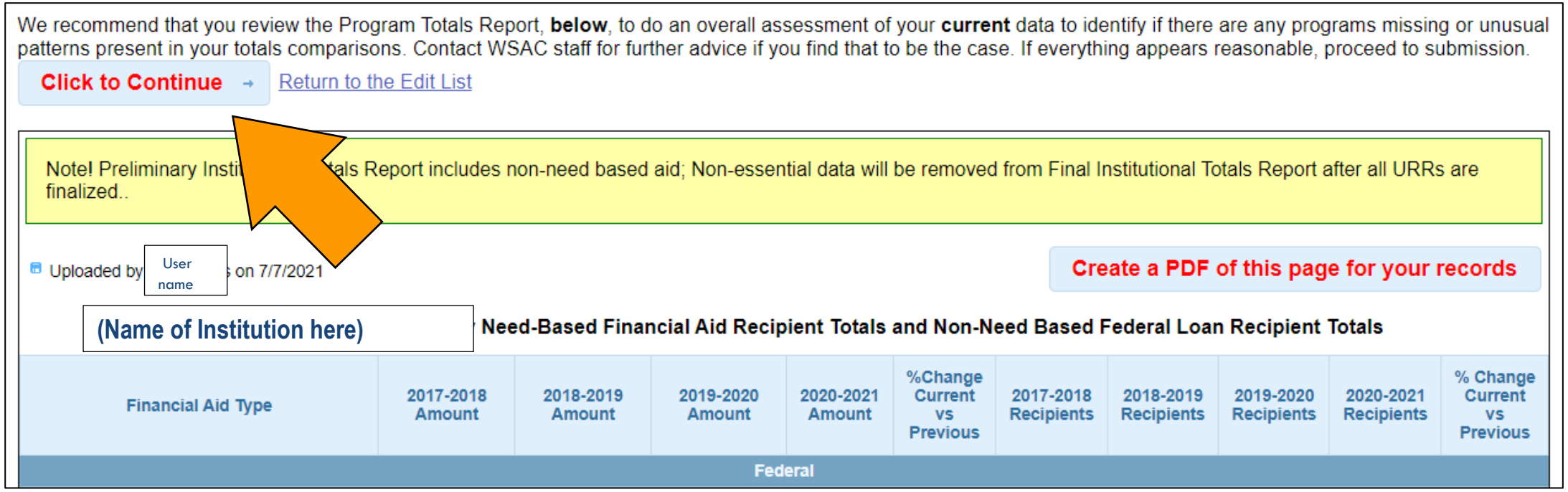
Address any SSN Mismatches: If the incorrect SSN originates outside of URR (in CSAW, for example), WSAC assistance is required to correct it. Press "Send an Email" and securely notify WSAC.

To edit incorrect SSNs that originate within the URR, click "Return to the Edit List" or "Search," revise the student record, and then "Click to Continue" after all errors have been fixed or overridden.



Submitting the Report, 2 of 3

- Review the preliminary Program Totals Report for missing information or unusual patterns. Download PDF for comparison with January 2022 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 Insti tals Report includes non-need based aid; Non-essential data will be removed from Final Institutional Totals Report after all URRs are finalized..

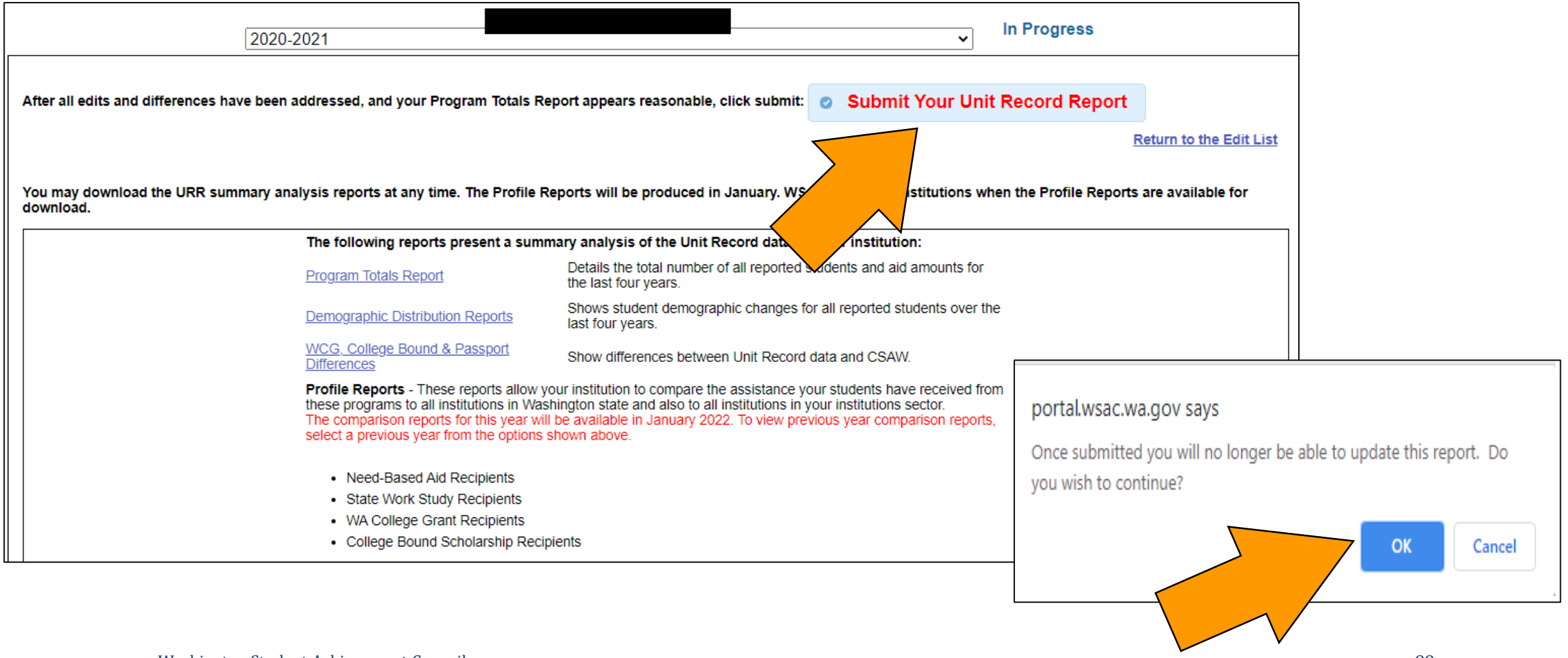
Uploaded by User name on 7/7/2021

Create a PDF of this page for your records

(Name of Institution here) Need-Based Financial Aid Recipient Totals and Non-Need Based Federal Loan Recipient Totals

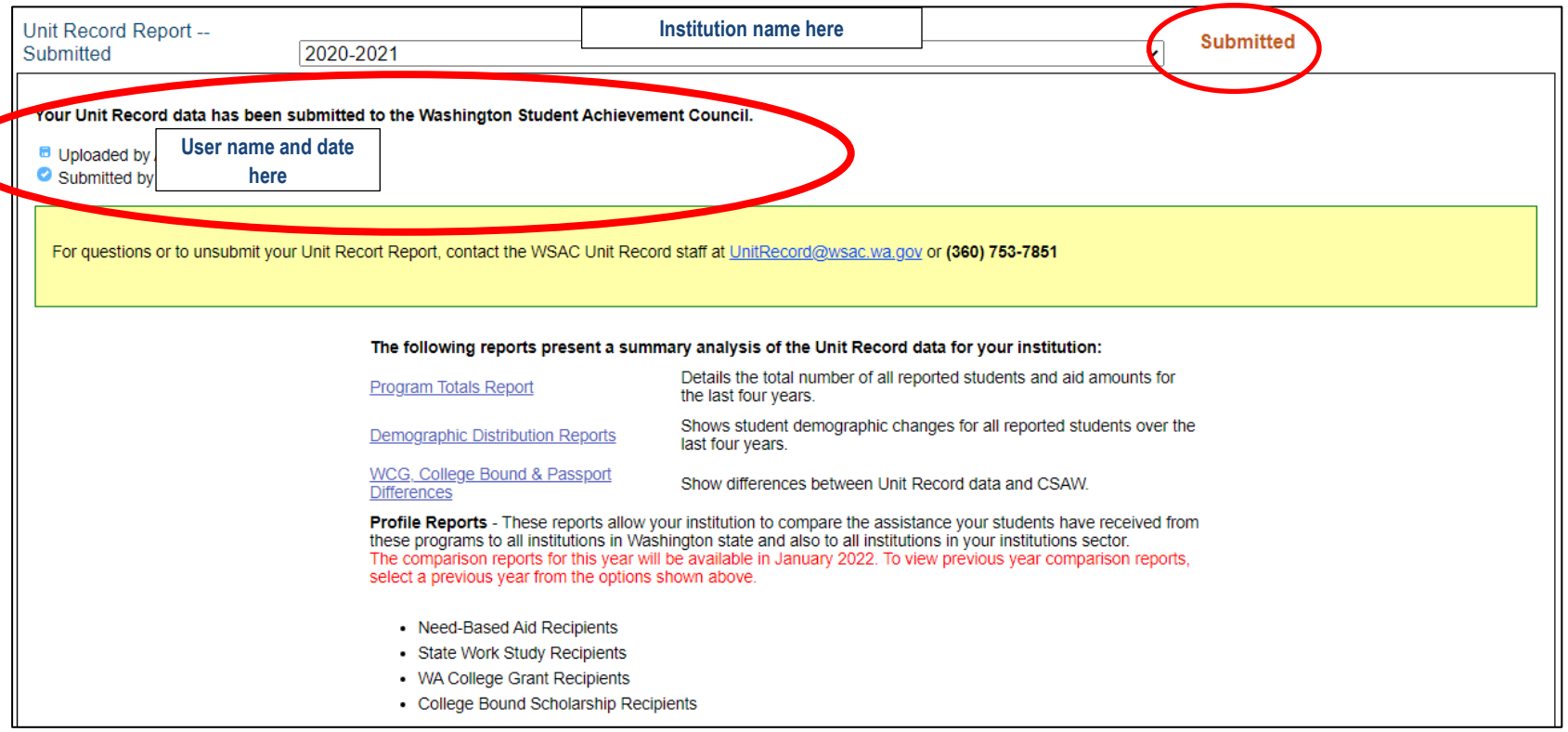
Financial Aid Type	2017-2018 Amount	2018-2019 Amount	2019-2020 Amount	2020-2021 Amount	%Change Current vs Previous	2017-2018 Recipients	2018-2019 Recipients	2019-2020 Recipients	2020-2021 Recipients	% Change Current vs Previous
Federal										

Submitting the Report, 3 of 3

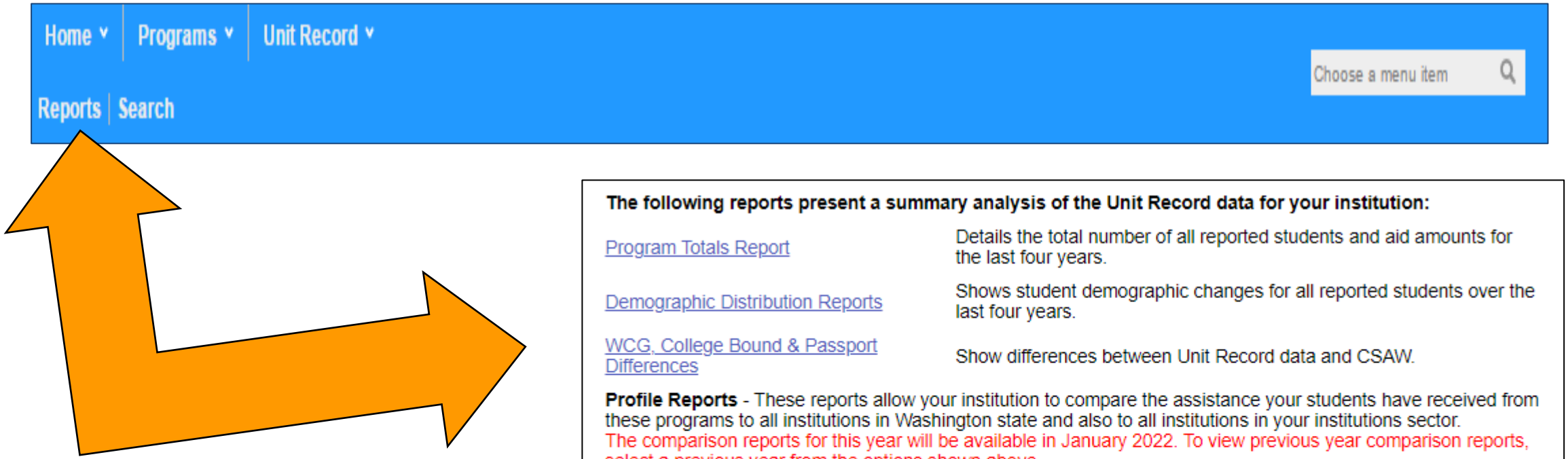


Before Exiting the URR Portal

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



Other URR Summary Reports



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.
WCG, 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 2022. To view previous year comparison reports, select a previous year from the options shown above.

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

Assistance with CTC Legacy System Issues

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

support@sbctc.edu

Where to go for help – WSAC URR Portal Issues

- Review the 2020-21 URR Manual, available online at:

  https://www.wsac.wa.gov/unit-record

- Contact Washington Student Achievement Council staff at:

  unitrecord@wsac.wa.gov

Ann Voyles	Marla Skelley	Carla Idohl-Corwin
360-485-1311	360-485-1320	360-485-1302
annv@wsac.wa.gov	marlas@wsac.wa.gov	carlai@wsac.wa.gov