



Unit Record Report 3.0

*Submitting the 2024-25 Report
and SBCTC ctcLink/PeopleSoft Update*

Training Webinar Presentation

August 14, 2025





Today's Presenters

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2024-2025 WSAC Unit Record Report Review Team

- **Marla Skelley**, Associate Director for Compliance
- **Ann Voyles**, Program Associate
- **Neesha Griffiths**, Receivables Coordinator



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>
- **July/August 2025:** URR Training; PortalTraining website available for file testing and practice of URR features
- **August 11:** Unit Record Report (URR) application opens
- **October 20:** Finalized report due
- **October/December:** WSAC analysis
- **December:** Reports to policy makers
- **January 2026:** 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 files in updated CSV layout format with a header row.
 - Report only students who received financial aid based on the 2024-25 FAFSA or WASFA year.
 - Review the field definitions in Chapter 2 of the Manual and the record layout in Appendices B and C to determine valid field content.



Reporting Requirements

- **Determine which students to report**
 - Need-Based Recipients – 2024-25 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 2024-25 FAFSA or WASFA.
- Report on next year's URR all financial aid received based on the 2025-26 FAFSA or WASFA.

- **State FA Reporting Component**

- Enter Institution and Aid Year
- Enter designated File Path
- Report Type = Blank
- Select RUN button

Financial Aid > CTC Custom > CTC Reports > State FA Reporting

Run Control ID WA220_URR_CB Report Manager Process Monitor **Run**

State FA Report

*Institution	WA220	Tacoma CC
*Aid Year	2025	2024-2025 Financial Aid Year
File Path	/CSTRANSFER/WA220/WCG2025/	
Report Type		

Save **Add** **Update/Display**

- Select 'Unit Record Report'
- Click OK button
- Report file is generated in csv format with header row- which includes who received awards for 2024-25 aid year

Process Scheduler Request

User ID CTC_CBURROW Run Control ID WA220_URR_CB

Server Name Run Date

Recurrence Run Time

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☐	WA College Grant Report	CTC_SNGRP_AE	Application Engine	Web	TXT	Distribution
☒	Unit Record Report	CTC_URR_AE	Application Engine	Web	TXT	Distribution

- **The ctcLink Unit Record Report selects:**
 - Need-Based Recipients
 - 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 *
- ☐ WA Bridge Grant *
- ☐ 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
- WSOS Graduate 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.

FAFSA/WASFA required for dependent students without family information but are receiving federal loans



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

- **Global Setup for the ctcLink Unit Record Report:**

- Ethnicity Category
- Award Category:
 - Need-Based FAFSA/WASFA data Required or Optional
 - Non-Need-Based Loans or Other
 - Award Maximum Amounts

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



Changes for the 2024-25 Unit Record Report Portal,

1 of 4

- **StudentAidIndex replaces ExpectedFamilyContribution**
 - Report negative SAI as a negative integer, and positive SAI as a positive integer
 - Negative SAI effectively is treated as a '0' in the Need equation
 - Subtraction of SAI from COA in the Need formula must not result in a negative Need Amount. Negative Need Amounts are invalid and must be adjusted to show '0' Need.



Changes for the 2024-25 Unit Record Report Portal,

2 of 4

- **Data no longer collected – Deleted Field Headers**
 - MaritalStatus
 - IsDependent
 - FamilySize
 - NumberInCollege
 - FamilyIncome
- **Error codes associated with deleted field headers have been removed** (see Error Code Revisions, page iv, in 2024-25 Unit Record Report Manual)



Changes for the 2024-25 Unit Record Report Portal,

3 of 4

- **EnrollmentStatus**

- Report using enrollment intensity credits (i.e., 0, 1 or 1.00, 2 or 2.00, 3 or 3.00, 3.25, 3.50, 3.75, etc.)
- Invalid input examples: Not enrolled, Full time, Half time, $\frac{3}{4}$ time, < Half time.

- **New WSAC programs added to 2024-25 header lay-out**

- BehavioralHealthConditionalScholarship – awards begin 2025-26
- SubstanceUseDisorderProfessionalGrant – reportable 2024-25



Changes for the 2024-25 Unit Record Report Portal,

4 of 4

- **Other Error code revisions**

- Error codes that formerly referenced Expected Family Contribution (EFC) now reference Student Aid Index (SAI)
- ‘Total Awarded Financial Aid exceeds the reported Need Amount’ error replaces ‘Total Need-Based Aid exceeds the reported Need Amount.’ [Cost minus SAI minus OFA* exceeds Need Amount]

- **Restore deleted URR student records – see URR Manual, pages 56-58**

- **Refer to Pages iii, iv, and v in the Manual for additional details**

* **Other Financial Assistance (OFA), as defined in federal regulations**



Reporting Requirements, 1 of 2

- **.CSV file requires header row (revised sample available)**
- **For all financial aid recipients reported**
 - Required fields:
 - SSN
 - First Name
 - Last Name
 - Gender
 - Is State Resident
 - Year In School
 - ISIR/WASFA Transaction #
 - Rejected ISIR WASFA
 - **Enrollment Status for each of all five terms**
 - **Financial Aid for each of all five terms – even if '0'**
- Report non-need-based aid received for all need-based recipients



Reporting Requirements, 2 of 2

- **Financial aid reported for each of five terms - based on 2024-25 FAFSA or WASFA:**
 - Summer-1 (primarily leader/header schools; report Summer-2 as '0')
 - Fall
 - Winter (semester schools to report as zeros '0')
 - Spring
 - Summer-2 (primarily trailer schools; report Summer-1 as '0')
 - Clock hour schools may report aid for both summer terms (all 5 terms)
 - If recipient enrolled more than one "term" in same summer – report total amount received and enrollment status as one enrollment term.
 - Review Chapter 2 of Manual for detailed information.



FAFSA & WASFA Related Fields

- **Fields to also report for 2024-25 FAFSA & WASFA filers**
 - ISIR/WASFA Transaction #
 - Rejected ISIR/WASFA
 - Need Duration
 - Cost of Attendance (COA)
 - Student Aid Index (SAI)
 - Need Amount

SPECIAL NOTES ABOUT SELECTED FIELDS





Social Security Numbers

- No duplicates. Files with duplicate SSNs will not upload.
- Invalid SSN sequences are flagged. Don't use "dummy" numbers.
- Student SSNs are matched to CSAW and other Portal records for all WSAC state aid programs.
- Discrepancies will appear in the error/differences reports.
- Guidance to resolve SSN issues described in Chapter 3 of the URR manual.



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 2024-25 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.



Student Aid Index (SAI) *

- **Report the Student Aid Index (SAI)**
 - Use SAI from the Federal Methodology (FM) calculation produced by U.S. Department of Education based on the 2024-25 FAFSA, or WASFA.
 - Report FM SAI if Institutional Methodology (IM) produces different SAI
 - FM SAI is not prorated for Need Duration of less than or greater than nine months, per federal regulations.
 - May be adjusted by professional judgment decisions using IM for the awarding of state aid only; report IM calculation in Override comment.

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



Cost of Attendance

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



Need Amount

$$\begin{aligned} &\text{Cost of Attendance} \\ &- \text{Student Aid Index (SAI)} \\ &= \text{Need Amount} \end{aligned}$$

- Based on months reported in Need Duration (ND); SAI not prorated for 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 Need values).
- Report negative SAI as a negative integer; however, negative SAI is treated as '0' in Need calculation.
- Overawards are flagged when $\text{COA} - \text{SAI} - \text{OFA} *$ exceeds the Need Amount

* Other Financial Assistance (OFA)



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
Full-Time	12.0 or more	300 or more *	12 to 30
Three-Quarter Time	9.0 – 11.9	225 – 299	9 to 11.75
Half-Time	6.0 – 8.9	150 – 224	6 to 8.75
Less Than Half-Time	3.0 – 5.9	75 – 149	1 to 5.75

* 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

- **Term Enrollment Status**

- Enrollment statuses are pulled from the Units Taken on the FA Term page
- FA Term values are reported as credits and included in the csv data file.
 - 12.00 credits - 30.00 credits = 'Full time'
 - 9.00 credits - 11.75 credits = '3/4 time'
 - 6.00 credits - 8.75 credits = 'Half time'
 - 1.00 credits – 5.75 credits = '< Half time'
 - 0 credits = 'Not Enrolled'



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

- Report the final awards and enrollment levels of student at time of disbursement.
- The Unit Record Reporting tool checks awards 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 2024-25
 - 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 student's 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 2024-25 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

EDITS



Ensuring Data Quality

- Edits help ensure data quality.
- Only two informational edits effective 2024-25 URR:
 - Date of Birth Outside Expected Range
 - Student Aid Index (SAI) Outside Expected Range
- Appendix C lists all edit errors and what action needs to take place.



Errors that Prevent File Upload

Refer to **Appendix C (page 84)** in the **Manual**

Examples of errors that prevent upload:

- Header row missing or invalid
- Duplicate SSNs
- Invalid codes
- Blanks reported in required fields
 - RejectedISIRWASFA is a required field

Be sure to review all 12 items!



“Must Fix” (Non-Overrideable) Error Examples

- **Refer to Appendix C (pages 84-87) in the Manual**
 - Non-resident with WCG or other state aid
 - Cost of Attendance is required for FAFSA-based and WASFA Aid Types
 - No Valid Institutional SWS Allocation in Portal



Overrideable Error Examples

- **Refer to Appendix C (pages 84-87) – Field Content**

- Need Amount is Zero with Need Based Aid.

Example: 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

- Cost of Attendance minus Student Aid Index (SAI) (calculated by the edit program) does not equal Need Amount reported by college.

- **Edit Reports**

- Recommended that reports be reviewed and worked in order shown here to verify that set up and errors are addressed prior to reviewing data to be included in the URR extract file.

- **Report C (CTCFAURR_C)-Missing Item Type Report**

- This report will identify any FA Item Type that has been awarded to a student with an amount greater than zero and qualifies to be reported in the Unit Record Report extract file, but the item type does not exist in the Unit Record Report Config setup page.

- **Report B (CTCFAURR_B) – Error Detail and Summary Report – this sample report is separated into 2 sections:**
 - The first tab contains a list of students, sorted by Last Name, First Name, and then EmplID, who have one or more errors. The error message number and description are included
 - The second tab contains a list of all error messages encountered on the first tab with a total student count for each

- **See Appendix C in the URR Doc for suggestions on resolving each error condition.**
- **Report A (CTCFAURR_A) – Student-detailed report**
 - This report provides a list of student details to be included in the extract file. In addition, the dollar amounts for each award received by the student is tallied and provided in the total columns



Reminders

- Keep Override comment(s) brief, but with sufficient detail to directly address the error message.
- The ISIR/WASFA transaction number reported should be the **most recent used to award the student**, not necessarily the last one filed. This is used to compare FAFSA/WASFA to URR and CSAW for discrepancies related to Student Aid Index (SAI). Comparisons appear in the On File tab in URR student record.



Reminders, continued:

- Report the full, non-prorated Student Aid Index, per federal regulations, even if student attended less than full time/full year.
- WSAC allows professional judgement adjustment of SAI using institutional methodology for the awarding of state aid programs.
 - In these instances, report IM and SAI adjustment details for the state aid award in the Override comment or in Notes where an Override is not available.
 - Must be consistently applied to all students if applied to one student.
- Report all known Race categories for each student, even where Hispanic Origin is marked 'Y' (this eliminates gaps in research data).

- **ctcLink Unit Record Report Basic Steps**

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



Tips and Best Practices

- Upload your CSV file early – don't wait until the deadline!
- Review WSAC's 2024-25 URR Manual and training materials. Test uploads using the PortalTraining environment:

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

(Data entered is temporary and clears overnight)

- Use URR informational reports to check for consistency & validity.
- CTCs – Review SBCTC 2024-25 URR Processing Guide(s) when available.
- Contact WSAC with questions or issues not addressed in WSAC's URR Manual.

USING THE WEB APPLICATION



Logon to the Portal

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

WSAC Portal - Login

portal.wsac.wa.gov

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WSAC Secure Portal
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[View FAFSA Completion statistics](#) for public school students
Request a staff portal account for:
• [GEAR UP](#)
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• [FAFSA Completion](#)

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

theWashBoard.org

WA529
GET Dream Ahead

GEAR UP
WASHINGTON STATE

College Bound Scholarship
WASHINGTON

WASHINGTON
OPPORTUNITY PATHWAYS



Portal URR Submission Tool

In the Programs menu, click on Unit Record.

The screenshot shows the WSAC portal interface. At the top is the WSAC logo with the text "WASHINGTON STUDENT ACHIEVEMENT COUNCIL" and "EDUCATION · OPPORTUNITY · RESULTS". Below the logo is a blue navigation bar with the following links: Home, Admin, Common, Csaw, and Programs. The Programs link is highlighted with an orange arrow. A dropdown menu is open under Programs, showing the following options: American Indian, College Bound, Passport, SWS, Teacher, Unit Record, WASFA, and WCG. The Unit Record option is highlighted with an orange arrow. The main content area of the portal includes a welcome message, a disclaimer about confidential student information, and a list of terms of use.

WASHINGTON STUDENT ACHIEVEMENT COUNCIL
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Home ▾
Admin ▾ | Common ▾ | Csaw ▾ | **Programs ▾**

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 the following terms of use apply:

- 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.



Uploading Data from File,

1 of 2

- The Welcome/Upload screen will appear, with a Navigation bar tracking progress.
- Browse your file directory to select the CSV file for upload
- **NOTE:** WSAC **auto-creates** and **adds** records to URR for students who have award data in WSAC records but are omitted from the upload file
- Click the blue “Start Upload” button

Upload Errors Review Submit

Upload an Excel (or CSV) file with unit record information for your students (**large CSV files (over 10MB) should be zipped before uploading**).

Note: During the upload, unit records will be created for students not included in this report, but who have award data on file (from CSAW or another reporting application)

Download the template [here.](#)

Choose File Browse

Start Upload Upload Manually



Uploading Data from File, 2 of 2

Upload Errors Review Submit

Successfully Uploaded

Search Students Add File Add Record

Students reported to date:

Year in School	Count
Freshman/1st Year	2
Sophomore/2nd Year	2
Junior/3rd Year	2
Senior/4th Year	2
Graduate	1
Other	1
Total	10

Delete All URR Data Download Report **Continue**

After successful upload, verify accuracy of student numbers by year in school and total records. Click “Continue” if the data is good.

Upload Errors Review Submit

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

Row Errors

- Row 3987 Field IsStateResident: " is an invalid value
- Row 3987 Field RejectedIsirWasfa: " is an invalid value
- Row 3988 Field IsStateResident: " is an invalid value
- Row 3988 Field RejectedIsirWasfa: " is an invalid value

Download Errors Try Again

If the upload fails due to “critical errors,” download error report to review errors, make corrections to the upload file, and then click “Try Again.” Reattempt upload with the revised file.



Overview of Error Status Types (Appendix C)

- **“Critical Errors”**

These errors prevent file upload. Errors must be corrected in the upload file before attempt to upload revised file.

- **“Must Fix”**

Non-Overrideable errors are revealed after successful file upload. Must save correction to the student record before moving forward to complete URR submission.

- **“Overrideable”**

Errors that require correction or an override explanation entry in the student record.

- **“Informational”**

These errors may or may not require correction to ensure clarity in reporting, depending on circumstances. **Must review record** to determine: (1) if a correction is required, or (2) if an override comment or a “Note” entry is required, or (3) if record can be left with little or no comment. WSAC does review informational error records for accuracy.



Main Institutional Error Screen

From Main Error Screen, sort by column headers, or Filter:

By Status:

Status: All
Error Type: — Select —
All
New Messages
Must Fix
Overrideable
Overridden
Informational
Resolved

or, by Error Type:

Status: All
Error Type: View All Error Types
— Select —
View All Error Types
Need Amount cannot exceed Cost of Attendance
Total aid reported is zero
College Bound Scholarship award not found in CSAW
WA College Grant award not found in CSAW
Cost Of Attendance minus SAI does not equal Need

Dropdown selection of viewable records per screen

Click highlighted SSN to open record

Upload Errors Review Submit

Unit Record Errors
36 errors (36 overrideable - 0 must fix - 0 overridden - 0 informational) ⓘ

Add Record Revalidate

Override Reason
Override Reason

Override 0 errors Delete 0 overrides

Status: All
Error Type: View All Error Types

* Resolved errors with no comment history do not appear in this table

Search: Search errors by all fields < Page 1 of 4 > Show 10 Download 36 Results to CSV

☐	SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
☐	900000001		A, Student	WA College Grant award not found in CSAW	Overrideable
☐	900000001		A, Student	Student Id Number must be provided by public schools - the f...	Overrideable
☐	900000001		A, Student	WA College Grant amount differs from CSAW (CSAW: 0; unit rec...	Overrideable





Editing Student Records – Error tab, 1 of 7

- Click one of four tabs to navigate within record
- No SSN “click” function while in the student record
- Error list downloadable
- Enter override comments from this screen or main Error screen
- Enter corrections in Details and Terms tabs. Resolved errors disappear from list if corrected before comment.
- Save all work by clicking blue “Save” button before exiting record

Student B (900000002) << Prev Next >> Return to List Delete Save

Details Terms On File Errors (3) ← 4 tabs

Override Reason

Override Reason

Override 0 errors Delete 0 overrides

Status: All Error Type: View All Error Types

* Resolved errors with no history do not appear in this table

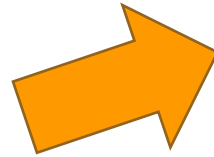
Search: Search error fields Page 1 of 1 Show 10 Download 3 Results to CSV

☐	SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
☐	900000002		B, Student	WA College Grant award not found in CSAW	Overrideable
☐	900000002		B, Student	Student Id Number must be provided by public schools - the f...	Overrideable



Editing Student Records – Detail tab, 2 of 7

- Student “Detail” tab
 - Student information
 - Race/Ethnicity data
 - ISIR WASFA transaction # and status (Rejected status)
 - Student ID
 - Year in School
- Edit directly in data field(s) and click Save



Student B (900000002) [◀ Prev](#) [Next ▶](#) [Return to List](#) [Delete](#) [Save](#)

[Details](#) [Terms](#) [On File](#) [Errors \(3\)](#)

Student Information	ISIR WASFA & School Information
First name	Transaction number
Middle name	Rejected
Last name	Student id
SSN or WASFA Id	Year in school ⓘ
Date of birth	Need
Gender	Duration (months)
Is resident	COA ⓘ
Ethnicity	SAI ⓘ
Hispanic origin	Need amount ⓘ
Asian	
Black/african american	
American indian alaska native	
Native hawaiian/pacific islander	
White	
Other race	



Editing Student Records – Terms tab, 3 of 7

- Student “Terms” tab, abbreviated view (shows programs with awards)
- Click/unclick “Show All” box to view/hide full programs list for editing
- Click/unclick lock icon to “lock” and “unlock” list view
- Enter changes directly in data field(s)

Student B (900000002) [◀ Prev](#) [Next ▶](#) [Return to List](#) [Delete](#) [Save](#)

[Details](#) **Terms** [On File](#) [Errors \(3\)](#)

☐ **Show All** [Click to lock](#)

	Summer 1	Fall	Winter	Spring	Summer 2	Total
Credits	12.00 credits ▼	0 credits ▼	0 credits ▼	0 credits ▼	0 credits ▼	
State						
WA College Grant	1000	0	0	0	0	1,000
Total	1,000	0	0	0	0	1,000



Editing Student Records – On File tab, 4 of 7

- Student “On File” tab
 - Comparison of student URR and WSAC program data
 - Green checks show data matches
 - Red “X” indicates data mismatch needs addressing

Details Terms On File Errors (2)				
	Program Data	Unit Record	ISIR/WASFA	
SAI ⓘ		\$6,137	\$6,137	✓
WCG	\$974	\$1,461		✗
WA Bridge	\$0	\$0		✓
CBS	\$0	\$0		✓
PTC	\$0	\$0		✓
PTC - Incentive	\$0	\$0		✓
Teacher Shortage		\$0		✓
Paraeducator		\$0		✓
ALT		\$0		✓
STG		\$0		✓
BHCS		\$0		✓
SUDP		\$0		✓
National Guard		\$0		✓
WAVE		\$0		✓



Editing Student Records - Overrides_{5 of 7}

Initial Overrides may be applied from the student's Errors tab or main institution Errors screen. Recommend reviewing student record tabs first.

- Click error box to be fixed
- Enter Override reason above
- Click Override Errors button
- Click “Save”
- Red “Overrideable” text will become green text

Student B (900000002) [Prev](#) [Next](#) [Return to List](#) [Delete](#) [Save](#)

[Details](#) [Terms](#) [On File](#) [Errors \(3\)](#)

Override Reason

This is an example comment to demonstrate how to override the checked error message

[Override 1 errors](#) [Delete 0 overrides](#)

Status: All [View All Error Types](#)

* Resolved errors and no comment history do not appear in this table

Search errors by all fields [Page 1 of 1](#) [Show 10](#) [Download 3 Results to CSV](#)

☐	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
☒	900000002	B, Student	WA College Grant award not found in CSAW	Overrideable
☐	900000002	B, Student	Student Id Number must be provided by public schools - the f...	Overrideable



Editing Student Records, 6 of 7

- Quickly view saved Override comment by hovering cursor over blue icon next to “Overridden” message.

* Resolved errors with no comment history do not appear in this table

Search: [<](#) Page 1 of 1 [>](#) Show 10 [Download 3 Results to CSV](#)

☐ SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
☐ 900000002	B, Student	WA College Grant award not found in CSAW		Overridden 
☐ 900000002	B, Student	Student Id Number must be provided		
☐ 900000002	B, Student	WA College Grant amount differs from		

This is an example comment to demonstrate how to override the checked error message

- Or, to view saved Override comment in the Errors list, click green “Overridden” text, and comment appears below Error message. Editable.

☐ SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
☐ 900000003	C, Student	College Bound Scholarship award not found in CSAW		Overridden 
 2:48:34 PM				
This is a test override comment.				



Editing Student Records, 7 of 7

- Override comments are editable by the original writer **prior** to URR submission and response by WSAC reviewer. New comment required if URR reverted.
- To add comment, select the Error and click “Overrideable,” enter, and Save new comment. To Edit, click pencil icon (see previous slide), enter and Save new comment.
- New comments can be edited until URR resubmitted.
- See URR Manual, Chapter 3, page 41-44, for more detail.

The screenshot displays the URR system interface. At the top, the 'Override Reason' section is highlighted with a red oval. It contains a text input field with the placeholder text 'This is a test response to the WSAC rejection comment' and two buttons: 'Override 1 errors' (blue) and 'Delete 0 overrides' (grey). Below this, there are filters for 'Status' (set to 'All') and 'Error Type' (set to 'View All Error Types'). A red asterisk note states: '* Resolved errors and comment history do not appear in this table'. Below the filters is a search bar and pagination controls showing 'Page 1 of 1' and 'Show 10' results. A 'Download 3 Results to CSV' button is also present. The main table has columns: 'Student ID', 'Name', 'Error (hover over the error to see the full text)', and 'Overrideable'. The first row shows a student ID of 900000003, a name of 'C, Student', and an error message: 'College Bound Scholarship award not found in CSAW'. The 'Overrideable' column for this row shows 'Overrideable' with an upward arrow and an envelope icon. Below the table, there are two comment entries. The first comment, timestamped '3:13:11 PM', says 'This is a test rejection comment.' The second comment, timestamped '2:58:15 PM', says 'This is a test override comment - Edited.' Two orange arrows point to the 'Error' and 'Overrideable' columns with the text 'select error' and 'select Overrideable' respectively.

Student ID	Name	Error (hover over the error to see the full text)	Overrideable
900000003	C, Student	College Bound Scholarship award not found in CSAW	Overrideable



Resolving Social Security Number Differences

Address any SSN Mismatches. Incorrect SSNs that originate outside of URR require WSAC assistance to correct (in CSAW, for example). Click “Send us an Email” and securely notify WSAC to initiate correction.



If the SSN error originates in the URR, click the student’s SSN in the main “Errors” screen to open and edit the student record, or enter “Search Students” to find and correct the student record. Remember to click “Save” to retain the change in the record.



“Bulk” Override Processing, 1 of 2

- Apply “Bulk” overrides judiciously. Review records to determine if correction is required rather than applying a Bulk Override comment. From Institution Main Errors screen, select the Error Type from dropdown box. Many errors with similar messaging may require an individualized comment.

Override Reason

Override Reason

Override 0 errors

Delete 0 overrides

Status: All

Error Type: View All Error Types

— Select —

View All Error Types

Need Amount cannot exceed Cost of Attendance

Total aid reported is zero

College Bound Scholarship award not found in CSAW

WA College Grant award not found in CSAW

Cost Of Attendance minus SAI does not equal Need

Student Id Number must be provided by publics

WA College Grant amount differs from CSAW

College Bound Scholarship amount differs from CSAW

Passport To College amount differs from CSAW

Summer1 term Enrollment cannot be 0 Credits when Summer1 term aid has been reported

Total Awarded Financial Aid exceeds the reported Need Amount

B, Student Student Id Number must be provided by public schools - the f...

* Resolved errors with no cor

Search: Search errors by all

Download 35 Results to CSV

SSN	Student	Overrideable
☐	900000001	Overrideable
☐	900000001	Overrideable
☐	900000001	Overrideable
☐	900000001	Overrideable
☐	900000002	Overrideable
☐	900000002	Overrideable



“Bulk” Override Processing, 2 of 2

- After review, check the boxes next to the student records to apply Override. If all records in that Error Type, click box next to SSN to “select all.”
- Enter Override reason
- Click blue Override Errors box
- Overrides applied to all checked records. Click “Save.”
- To delete bulk Overrides, check selected records and click gray “Delete Overrides.”

Override Reason
This is an example of a bulk override comment

Override 2 errors Delete 0 overrides

Status: All
Error Type: WA College Grant amount differs from CSAW

* Resolved errors with no comment history do not appear in this table

Search: Search errors by all fields Page 1 of 1 Show 100 Download 2 Results to CSV

☒	SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
☒	9000000		A, Student	WA College Grant amount differs from CSAW (CSAW: 0; unit rec...	Overrideable
☒	9000000		B, Student	WA College Grant amount differs from CSAW (CSAW: 0; unit rec...	Overrideable



Search for Existing URR Records for Edit, 1 of 2

Navigate to the “Upload” screen and click “Search Students.”

Upload Errors Review Submit

Successfully Uploaded

Search Students Add File Add Record

Students reported to date:

Year in School	Count
Freshman/1st Year	2
Sophomore/2nd Year	2
Junior/3rd Year	2
Senior/4th Year	2
Graduate	1
Other	1
Total	10

Delete All URR Data Download Report Continue

This opens the Search screen, where you can:

- Search for multiple records by adding a comma-separated SSN file (top arrow)
- Search individually (“Search by any field”)

Unit Record Search

Search: Search by comma-separated SSN List

Search: Search by any field

< Page 1 of 1 > Show 10 Download 1 Results to CSV

SSN	Name	Family Size	In College	Family Income	EFC Amount	Need	Year In School
999090050	Doe, John	38					Freshman/1st Year



Search for Existing URR Records for Edit, 2 of 2

- Edit the record and click “Save,” or click “Delete” to discard the record.
- Click “Return to List” to return to the Search screen.
- Then click “Go to Report” to exit “Search.”

Student B (900000002) [◀ Prev](#) [Next ▶](#) [Return to List](#) [Delete](#) [Save](#)

[Details](#) [Terms](#) [On File](#) [Errors \(3\)](#)

Student Information

First name	Student
Middle name	Middle name
Last name	B
SSN or WASFA Id	900000002
Date of birth	07/02/2005
Gender	Male
Is resident	Yes

Ethnicity

Hispanic origin	No
Asian	No
Black/african american	No
American indian alaska native	Yes
Native hawaiian/pacific islander	No
White	No
Other race	No

WASFA & School Information

Transaction number	1
Rejected	No
Student id	Student id
Year in school	Freshman/1st Year

Need

Duration (months)	10
COA	30000
SAI	0
Need amount	30000



Manually Adding Student Records, 1 of 3

- Records may be added from either the “Upload” or “Errors” screen by clicking “Add Record”

[Add a Note](#) or [Send us an Email](#)

Upload Errors Review Submit

Unit Record Errors

36 errors (36 overrideable - 0 must fix - 0 overridden - 0 informational)

[Add Record](#) [Revalidate](#)

Override Reason

Override Reason

[Override 0 errors](#) [Delete 0 overrides](#)

Status:

Error Type:

* Resolved errors with no comment history do not appear in this table

Search: [Page 1 of 4](#) [Show 10](#) [Download 36 Results to CSV](#)

☐	SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
☐	900000001		A, Student	Summer1 term Enrollment Status cannot be Not Enrolled when S...	Overrideable
☐	900000001		A, Student	WA College Grant award not found in CSAW	Overrideable

[Add a Note](#) or [Send us an Email](#)

Upload Errors Review Submit

Successfully Uploaded

[Add File](#) [Add Record](#)

Students reported to date:

Year in School	
Freshman/1st Year	
Sophomore/2nd Year	2
Junior/3rd Year	2
Senior/4th Year	2
Graduate	1
Other	1
Total	10

[Discard Upload](#) [Download Report](#) [Continue](#)



Manually Adding Student Records, 2 of 3

- In the blank record, complete all required fields in Detail and Terms screens, and “Save” to retain record.

Add Unit Record Save

Details **Terms**

Student Information

First name

Middle name

Last name

SSN or WASFA Id

Date of birth

Gender

Is resident

Ethnicity

Hispanic origin

Asian

Black/african american

American indian alaska native

Native hawaiian/pacific islander

White

Other race

ISIR WASFA & School Information

Transaction number

Rejected

Student id

Year in school

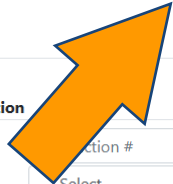
Need

Duration (months)

COA

SAI

Need amount

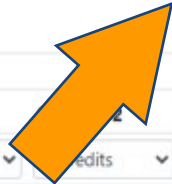


Add Unit Record Save

Details **Terms**

☒ Show All Click to lock

	Summer 1	Fall	Winter	Spring	Summer 2	Total
Credits	0 credits	0 credits	0 credits	0 credits	0 credits	0 credits
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 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						





Manually Adding Student Records, 3 of 3

- Users generally receive immediate feedback in student's Errors tab if edits needed. Make corrections or enter override comment(s), then "Save."
- Click "Revalidate" button after returning to the Main Institution Error screen and before proceeding to the "Review" step.

Student O (009999999)

Go to Report Delete Save

Details Terms On File **Errors (6)**

Override Reason

Override Reason

Override 0 errors Delete 0 overrides

Status: All

Error Type: View All Error Types

* Resolved errors with no comment history do not appear in this table

Search: Search errors by all fields Page 1 of 1 Show 10

☐	SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
☐	009999999	3849039203	O, Student	WA College Grant award not found in CSAW	Overrideable

Add a Note or Send us an Email

Upload ✓ Errors ✓ Review Submit

Unit Record Errors

24 errors (24 overrideable - 0 must fix - 24 overridden - 0 informational)

Add Record Revalidate Continue to Review



Manually Deleting Student Records, 1 of 2

- Find and open the student record from the Errors or the Search screen. (Remember: auto-added records cannot be deleted from the URR.)
- Click “Delete,” and then click “Confirm Delete” buttons

Student B (900000002) [Prev](#) [Next](#) [Return to List](#) [Delete](#) [Save](#)

[Details](#) [Terms](#) [On File](#) [Errors \(Resolved\)](#)

Student Information

First name	Student
Middle name	Middle name
Last name	B
SSN or WASFA Id	900000002
Date of birth	07/03/2005
Gender	Male
Is resident	Yes

Ethnicity

Hispanic origin	No
Asian	No
Black/african american	No
American indian alaska native	Yes
Native hawaiian/pacific islander	No
White	No
Other race	No

ISIR WASFA & School Information

Transaction number	1
Rejected	No
Student id	Student id
Year in school	Freshman/1st Year

Need

Duration (months)	10
COA	30000
SAI	0
Need amount	30000

Student B (900000002) [Prev](#) [Next](#) [Return to List](#) [Confirm Delete](#) [Cancel](#)

[Details](#) [Terms](#) [On File](#) [Errors \(Resolved\)](#)

Student Information

First name	Student
Middle name	Middle name
Last name	B
SSN or WASFA Id	900000002
Date of birth	07/03/2005
Gender	Male
Is resident	Yes

Ethnicity

Hispanic origin	No
Asian	No
Black/african american	No
American indian alaska native	Yes
Native hawaiian/pacific islander	No
White	No
Other race	No

ISIR WASFA & School Information

Transaction number	1
Rejected	No
Student id	Student id
Year in school	Freshman/1st Year

Need

Duration (months)	10
COA	30000
SAI	0
Need amount	30000



Manually Deleting Student Records, 2 of 2

- The record will be marked as deleted in the institution's main Error menu (Remember: auto-added records cannot be deleted from the URR.)
- Deleted records may be restored – click “Restore” in the student record

Unit Record Errors

29 errors (28 overrideable - 0 must fix - 1 overridden - 0 informational) ⓘ

[Add Record](#) [Revalidate](#)

Override Reason

[Override 0 errors](#) [Delete 0 overrides](#)

Status: All

Error Type: View All Error Types

* Resolved errors with no comment history do not appear in this table

< Page 1 of 3 > Show 10 [Download 30 Results to CSV](#)

☐	SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
☐	900000001		A, Student	Student Id Number must be provided by public schools - the f...	Overrideable ⓘ
☐	900000002		B, Student	Student Id Number must be provided by public schools - the f...	Resolved ⓘ (Unit Record Deleted)
☐	900000003		C, Student	College Bound Scholarship award not found in CSAW	Overrideable

Student B (900000002) ⓘ

[Restore Deleted Unit Record](#) [Prev](#) [Next](#) [Return to List](#)

[Details](#) [Terms](#) [On File](#) [Errors \(Resolved\)](#)

Student Information

First name	Student
Middle name	Middle name
Last name	B
SSN or WASFA Id	900000002
Date of birth	07/03/2005
Gender	Male
Is resident	Yes

Ethnicity

Hispanic origin	No
Asian	No
Black/african american	No
American indian alaska native	Yes
Native hawaiian/pacific islander	No
White	No
Other race	No

ISIR WASFA & School Information

Transaction number	1
Rejected	No
Student id	Student id
Year in school ⓘ	Freshman/1st Year
Need	
Duration (months)	10
COA ⓘ	30000
SAI ⓘ	0
Need amount ⓘ	30000



Supplemental File Uploads, 1 of 3

- Must use a valid .csv header as top row of file and include complete student record information in each data row.
- Add or delete records or make changes to multiple records simultaneously.
- Mixed types of changes may be included in a single supplemental file.
- If editing existing records, retain full data for the student and edit only fields needing change. File overwrites existing data for affected students.
- Cannot discard successful Supplemental File upload. Must edit records from the Search or Errors screen(s) or upload a compensating supplemental file. Unsuccessful Supplemental File uploads feature a “Try Again” button. Click “Download error file” for the critical error(s) list to identify/fix errors in supplemental file before attempting upload of the corrected file.



Supplemental File Uploads, 2 of 3

- Cut-away example shows supplemental file creation with correct IsDelete status for two records to be Deleted (“True”), and one record that is either an Add record or a record being updated and retained (“False”).



	A	B	C	D	E	F
1	IsDelete	SSN	InstitutionStudentId	LastName	FirstName	MiddleName
2	TRUE	9000000014		K	Student	
3	TRUE	9000000015		L	Student	
4	FALSE	9000000017		N	Student	
5						

- Enter “True,” “Yes,” or “Y” in IsDelete field for record deletions from URR.
- Enter “False,” “No,” or “N” in IsDelete field to add new records or to install edits to existing records.



Supplemental File Uploads, 3 of 3

- After creating Supplemental File, navigate to Upload screen and click “Add File.” Follow same steps to select and upload original file.

Upload Errors Review Submit

Successfully Uploaded

Search Students Add File Add Record

Students reported to date: ⓘ

Year in School	Count
Freshman/1st Year	2
Sophomore/2nd Year	2
Junior/3rd Year	2
Senior/4th Year	2
Graduate	1
Other	1
Total	10

Delete All URR Data Download Report Continue

[Add a Note](#) or [Send us an Email](#)

Upload Errors Review Submit

Add New File

Upload an Excel (or CSV) file with unit record information for your students **(large CSV files (over 10MB) should be zipped before uploading).**

Note: During the upload, a new record will be created for students not included in this report, but who have a unit record in file (from CSAW or another reporting application)

Download the template [unit-record-report-partial change test file.csv](#) [Browse](#)

Cancel Start Upload

Upload Errors Review Submit

Successfully Uploaded

Search Students Add File Add Record

Students reported to date: ⓘ

Year in School	Count
Freshman/1st Year	4
Sophomore/2nd Year	2
Junior/3rd Year	2
Senior/4th Year	2
Graduate	1
Other	1
Total	12

Delete All URR Data Download Report Continue



Add Notes to URR

- Explanatory notes may be added for WSAC staff to view after submission.
- Click “Add a Note” from any screen.

[Add a Note](#) or [Send us an Email](#)

Upload ☒ Errors Review Submit

Add a Note

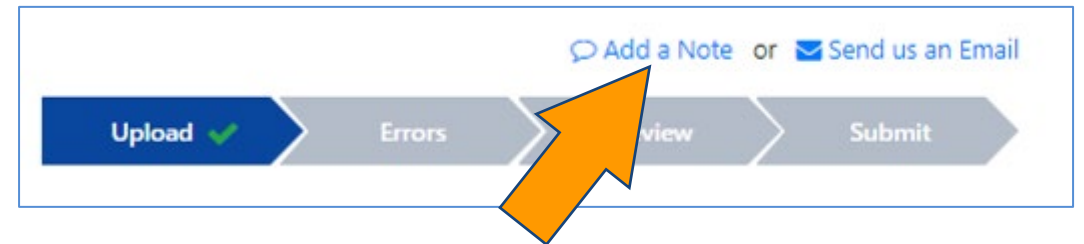
Anything we should know? Feel free to leave us a detailed note. Be sure to mention the page you were on, the student you were looking at, etc. We'll see it when you submit your report.

[Save Note](#)

History

11:22:14 AM

You are able to add notes to the file at any point, that WSAC still will review when the URR has been submitted.



- Enter text and click “Save Note.”
- Notes are editable by the original writer.
- Multiple Notes may be entered by different Users and retained in URR history.



Review and Submit the URR, 1 of 6

After addressing all errors and any edits are complete, click “Continue to Review.”

[Add a Note](#) or [Send us an Email](#)

Upload Errors Review Submit

Unit Record Errors

43 errors (0 overrideable - 0 must fix - 43 overridden - 0 informational)

[Add Record](#) [Revalidate](#) [Continue to Review](#)

Override Reason

Override Reason

[Override 0 errors](#) [Delete 0 overrides](#)

Status:

Error Type:

* Resolved errors with no comment history do not appear in this table

Search: [<](#) Page 1 of 5 [>](#) Show 10 [Download 43 Results to CSV](#)

☐	SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
☐	900000001		A, Student	Summer1 term Enrollment Status cannot be Not Enrolled when S...	Overridden
☐	900000001		A, Student	WA College Grant award not found in CSAW	Overridden



Review and Submit the URR, 2 of 6

- Review the preliminary Program Totals Report to determine if any programs are missing or if unusual patterns appear in Totals comparisons.
- Contact WSAC to discuss if any questions.
- Download PDF for comparison with January 2026 final report.
- If all appears in order, click “Confirm Report.”
- Then click “Continue to Submit” in next screen that appears.

[Add a Note](#) or [Send us an Email](#)

[Upload](#) [Errors](#) [Review](#) [Submit](#)

Program Totals Report

Need-Based Financial Aid Recipient Totals and Non-Need Based Federal Loan Recipient Totals

We recommend that you review the Program Totals Report, below, to do an overall assessment of your current data to determine 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, confirm the report and continue.

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

[Confirm Report](#)

[Download PDF](#)

	2021-2022		2022-2023		2023-2024		2024-2025		% Change	
Federal Aid	Awards	Amount	Awards	Amount	Awards	Amount	Awards	Amount	Awards	Amount
Federal Pell Grant	147	\$737,903	139	\$671,728	151	\$825,701	195	\$912,283	29.1%	30.8%
Federal SEOG	86	\$117,950	78	\$123,078	123	\$117,949	97	\$91,283	-21.1%	-22.6%
Federal TEACH Grant	0	\$0	0	\$0	0	\$0	0	\$0	0.0%	0.0%
Federal Nursing Scholarship	0	\$0	0	\$0	0	\$0	0	\$0	0.0%	0.0%
Federal Workstudy	42	\$72,257	43	\$104,425	45	\$104,416	44	\$109,046	-2.2%	4.4%
Federal Perkins Loan	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	0.0%	0.0%
Federal Grad PLUS Loan	0	\$0	0	\$0	0	\$0	0	\$0	0.0%	0.0%
Federal Parent PLUS Loan	90	\$2,472,318	88	\$2,404,288	92	\$2,759,611	103	\$3,350,279	12.0%	21.4%
Federal Nursing Health Loan	0	\$0	0	\$0	0	\$0	0	\$0	0.0%	0.0%
Federal Direct Subsidized Loan	224	\$980,152	226	\$962,226	255	\$1,045,109	238	\$954,358	-6.7%	-8.7%
Federal Direct Unsubsidized Loan	239	\$817,254	242	\$800,150	268	\$912,307	266	\$866,999	-0.7%	-5.0%
		\$5,197,834		\$5,065,895		\$5,765,093		\$6,451,774		11.9%



Review and Submit the URR, 3 of 6

- Before Submit, WCG/CBS/PTC Differences Reports must be reviewed to ensure no unresolved differences remain.
- Each program is a separate report.
- Any differences must be addressed or accounted for.

CSAW Differences Report
WCG, CBS & Passport Differences Between Unit Record and CSAW

— Select —
— Select —
wgc
cbs
ptc
bridge

SSN Name Student ID Awarded

[Add a Note](#) or [Send us an Email](#)

Upload ✓ Errors ✓ Review ✓ Submit

Before submitting, please review the WCG, CBS & Passport Differences report in the list below.

[I've reviewed the report](#)

If all errors and differences have been addressed, and your Program Totals Report appears reasonable, click submit.

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

Please note: The Profile Reports will be produced in January. WSAC will notify institutions when the Profile Reports are available for download:

- [Demographic Distribution Reports](#)
- [Program Totals Report](#)
- [WCG, CBS & Passport Differences](#)
- [Profile Reports](#)



Review and Submit the URR, 4 of 6

- Example of Differences Report for WCG

CSAW Differences Report

WCG, CBS & Passport Differences Between Unit Record and CSAW

Return to Report Summary

wcg

Search: < Page 1 of 3 > Show 10 Download 25 Results to CSV

SSN	Name	Student ID	Awarded	Unit Record	Difference	Overridden
900000046	O, Student		\$2,705	\$11,040	\$8,335	Yes ⓘ
900000047	P, Student		\$3,607	\$8,832	\$5,225	No
900000048	R, Student		\$5,520	\$7,728	\$2,208	Yes ⓘ

- “Yes” in Override column confirms differences already addressed through an Override request and/or funds to be returned to WSAC.
- “No” or blank indicates unaddressed errors, SSN issues, or missing student records.



Review and Submit the URR, 5 of 6

- If submitted with significant differences, WSAC staff will reach out to resolve questions about the differences before the URR is finalized.
- After addressing Differences Reports reviews for all four programs (WCG, CBS, Passport, and Bridge), click “Return to Report Summary” to return to Submit screen. Then, click “I have reviewed the report.”

CSAW Differences Report
WCG, CBS & Passport Differences Between Unit Record and CSAW

Return to Report Summary

wcg

Search: Page 1 of 3 Show 10 [Download 25 Results to CSV](#)

SSN	Name	Student ID	Awarded	Unit Record	Difference	Overridden
900000046	O, Student		\$2,705	\$11,040	\$8,335	No
900000047	P, Student		\$3,607	\$8,832	\$5,225	No
900000048	R, Student		\$5,520	\$7,728	\$2,208	No

Upload ✓ Errors ✓ Review ✓ Submit

Before submitting, please review the WCG, CBS & Passport Differences report in the list below.

[I've reviewed the report](#)



Review and Submit the URR, 6 of 6

- The “Submit” button will appear. Click “Submit,” then “Confirm.” Success!

The first screenshot shows a progress bar with 'Upload', 'Errors', and 'Review' steps marked with green checkmarks, followed by a blue 'Submit' button. Below the progress bar, the text reads: 'Ready To Submit? ⓘ If all errors and differences have been addressed, and your Program Totals Report appears reasonable, click submit. The following reports present a summary analysis of the Unit Record data for your institution.' An orange arrow points from the 'Submit' button to the second screenshot.

The second screenshot shows the same progress bar, but the 'Submit' button has been replaced by 'Confirm' and 'Cancel' buttons. The text below the progress bar reads: 'Ready To Submit? ⓘ have been addressed, and your Program Totals Report appears reasonable, click submit. The following reports present a summary analysis of the Unit Record data for your institution.' An orange arrow points from the 'Confirm' button to the third screenshot.

The third screenshot shows the 'Successfully Submitted ⓘ' confirmation screen. The progress bar now includes a fourth step, 'Submit', also marked with a green checkmark. The text below the progress bar reads: 'The following reports present a summary analysis of the Unit Record data for your institution. Please note: The Profile Reports will be produced in January. WSAC will notify institutions when the Profile Reports are available for download:'. A list of reports is provided: 'Demographic Distribution Reports', 'Program Totals Report', 'WCG, CBS & Passport Differences', and 'Profile Reports'. An orange arrow points from the 'Successfully Submitted' heading to the list of reports.



“Point-in-time” URR Data File Downloads

- Full URR “point-in-time” data file downloads are available on the “Upload” screen.
- Constitutes full URR file in the Portal, with all edits saved through the time of download. (Override comments omitted.)
- Download recommended at time of URR Submit for institutional records.
- May be useful to create data file for supplemental file uploads, retaining all edits to date, history.

Upload

Errors

Review

Submit

Successfully Uploaded

Search Students

Students reported to date:

Year in School	Count
Freshman/1st Year	4
Sophomore/2nd Year	2
Junior/3rd Year	2
Senior/4th Year	2
Graduate	1
Other	1
Total	12



Download Report

Continue



Reports Available After Submission

- Reports (blue font) available from the Submit screen immediately after submission include:
 - Demographic Distribution Reports
 - Program Totals Report (Preliminary)
 - WCG, CBS & Passport Differences Reports (includes Bridge & SUDP Differences Report)
- Profile Reports available January 2026
 - Need-Based Aid Recipients
 - State Work Study Recipients
 - WA College Grant Recipients
 - College Bound Scholarship Recipients

2574 - Test School-4

2024-2025

Add a Note or Send us an Email

Upload ✓ Errors ✓ Review ✓ Submit ✓

Successfully Submitted ✓

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

Please note: The Profile Reports will be produced in January. WSAC will notify institutions when the Profile Reports are available for download:

- [Demographic Distribution Reports](#)
- [Program Totals Report](#)
- [WCG, CBS & Passport Differences](#)
- Profile Reports

Questions?



Where to go for help – ctcLink System

- The URR Processing Guide is available on the ctcLink Reference Center

<http://ctclinkreferencecenter.ctclink.us/>

- Contact FA Support Team for questions or assistance with set up or running of the ctcLink Unit Record Report. File a ticket via the Service Desk at:

<https://servicedesk.sbctc.edu/helpdesk/WebObjects/Helpdesk.woa>

- Select Ticket Category: ctcLinkSupport > Financial Aid > FA:URR



Where to go for help – WSAC URR Portal Issues

- Review the 2024-25 URR Manual, available online at:
<https://www.wsac.wa.gov/unit-record>
- Contact WSAC Unit Record Report team at:
unitrecord@wsac.wa.gov

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