WASHINGTON STUDENT
ACHIEVEMENT COUNCIL
EDUCATION · OPPORTUNITY · RESULTS

2025 Fall Interim Reporting Walkthrough and Q&A

September 2025

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Agenda

➢ **Updates and Reminders**

➢ **Interim Edits**

➢ **WASFA Corrections**

➢ **Interim Report Process Walkthrough**

➢ **Q&A**

CHEERS
to a new academic year!

In a few words, what would you like to learn today?

ⓘ Start presenting to display the poll results on this slide.

Updates

2025-26 CBS Eligibility Checker Updates

CBS Eligibility is expanded to high school equivalency certificates (ex: GED)

College Bound award must be used within 6 years of first enrolling (must enroll within 1 year of graduation)

Name	SSN	Birth Date	SID	OK to Award	OK to Pay	HS/GED Grad Year	HS 2.0 GPA	Enrolled By Deadline	Elig. Open	CBS Qtrs Used	CBS Qtrs Remaining	In Repayment	Last Updated
⬚ Details	👁 •••—••			2-Year/Transfer updated 08/22/2023	2-Year/Transfer updated 08/22/2023	2021 actual from OSPI	Verify	Yes	Yes	0.75	17.25	No	08/20/2025
Smith Details	👁 •••—•—			No updated 02/04/2025	No updated 08/15/2023	2021 actual from OSPI	No	No	No	0.00	18.00	No	08/20/2025
Smith Details	👁 •••—•!			Yes updated 02/04/2025	Yes updated 08/22/2023	2021 actual from OSPI	Yes	Yes	Yes	1.00	17.00	No	08/20/2025

Updates

New Edit Screen

	Edits	Request Funds	Interim Report	Students	Account Status	✉ Send a Secure Message to WSAC

2025-2026 ▾		▾

1394 Edits (297 informational)
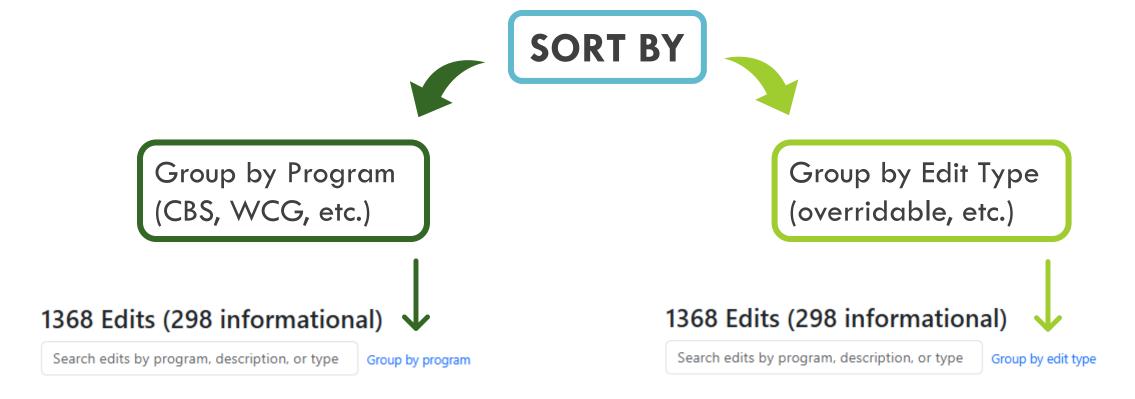
Search edits by program, description, or type	Group by edit type

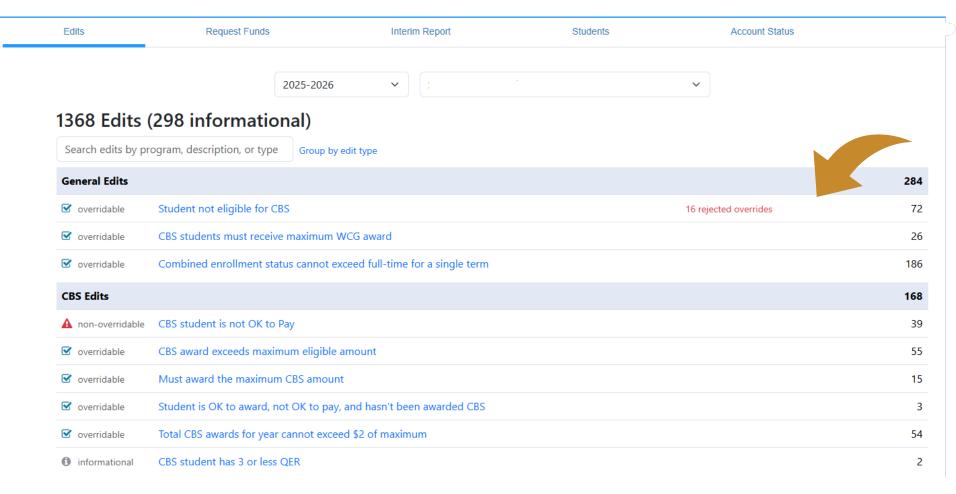| **General Edits**		**231**
⚠ non-overridable	Student not eligible for WCG	1
☑ overridable	CBS students must receive maximum WCG award	27
☑ overridable	Combined enrollment status cannot exceed full-time for a single term	187
☑ overridable	Student not eligible for CBS	16
CBS Edits		**242**
⚠ non-overridable	CBS student is not OK to Pay	70
☑ overridable	CBS award exceeds maximum eligible amount	55
☑ overridable	Must award the maximum CBS amount	16
☑ overridable	Student is OK to pay but hasn't been awarded CBS	45
☑ overridable	Total CBS awards for year cannot exceed $2 of maximum	54
ⓘ informational	CBS student has 3 or less QER	2

Washington Student Achievement Council

New Edit Screen Features:

SORT BY

Group by Program (CBS, WCG, etc.)

Group by Edit Type (overridable, etc.)

1368 Edits (298 informational)

Search edits by program, description, or type   Group by program

1368 Edits (298 informational)

Search edits by program, description, or type   Group by edit type

Updates

Coming Soon - Edit Screen Features:

Edits	Request Funds	Interim Report	Students	Account Status

2025-2026

1368 Edits (298 informational)

Search edits by program, description, or type   Group by edit type

General Edits			284
☑ overridable	Student not eligible for CBS	16 rejected overrides	72
☑ overridable	CBS students must receive maximum WCG award		26
☑ overridable	Combined enrollment status cannot exceed full-time for a single term		186
CBS Edits			**168**
⚠ non-overridable	CBS student is not OK to Pay		39
☑ overridable	CBS award exceeds maximum eligible amount		55
☑ overridable	Must award the maximum CBS amount		15
☑ overridable	Student is OK to award, not OK to pay, and hasn't been awarded CBS		3
☑ overridable	Total CBS awards for year cannot exceed $2 of maximum		54
ⓘ informational	CBS student has 3 or less QER		2

Any edits with rejected overrides will show.

Updates

Coming Soon - Edit Screen Features:

Can sort the list by rejected overrides first!

Student not eligible for CBS
☑ overridable

1–15 of **72** items
☑ Show rejected overrides first

	SID ⇕	SSN ⇕	Name ▲	Term ⇕	Credits ⇕	WCG ⇕	CBS ⇕	PTC ⇕			
☐		👁 •••-••-		Summer 1	12.00 credits ⌄	$1,641	$167		Save	Override ⚠	Delete Awards
☐		👁 •••-••-		Summer 1	15.00 credits ⌄	$1,641	$167		Save	Override ⚠	Delete Awards
☐		👁 •••-••-		Summer 1	10.00 credits ⌄	$1,362	$138		Save	Override ⚠	Delete Awards
☐		👁 •••-••-		Summer 1	12.00 credits ⌄	$1,641	$167		Save	Override ⚠	Delete Awards
☐		👁 •••-••-		Summer 1	20.00 credits ⌄	$1,641	$167		Save	Override ⚠	Delete Awards

Washington Student Achievement Council

Updates
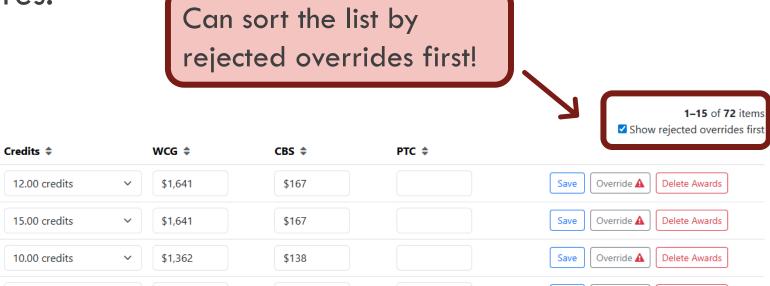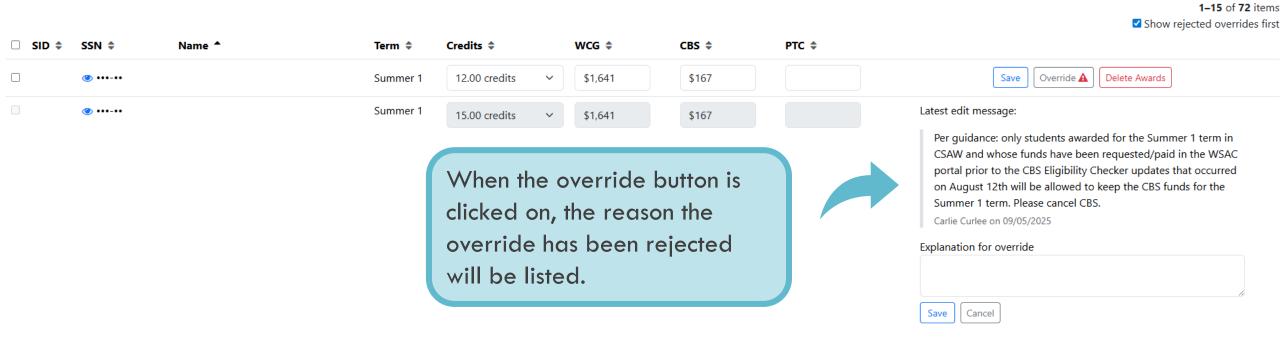
Coming Soon - Edit Screen Features:

Student not eligible for CBS
☑ overridable

When the override button is clicked on, the reason the override has been rejected will be listed.

Washington Student Achievement Council

Reminders

Updated Upload Screen

Incremental file format only

Reminders

Incremental File Upload

WHAT IS IT?

The incremental file upload allows you to load partial student data instead of a full file, also called a change-only file. **You will also use this as your initial full student data upload.**

Reminders

- The incremental file layout added one new column at the beginning of your file.

    – "IsDelete" column, mark "Y" if you want to delete student awards.

- Uploading incremental student data will not affect any of the student awards that are not listed on the file, which means it won't delete information if a student is not included.

    – Similar to the Unit Record Report

Incremental File Upload

- $0 awards on the file equals "Need Met"
    □ Leave award amount blank if the student doesn't meet eligibility requirements.

Reminders

8/2025 CBS GUIDANCE

Students awarded for the Summer 1 term in CSAW and **whose funds have been requested/paid in the WSAC portal prior** to the CBS Eligibility Checker updates that occurred on August 12th will be allowed to keep the CBS funds for the Summer 1 term only.

Please cancel any future CBS awards for ineligible students, as well as Summer 1 awards whose funds were never requested.

Override "Student not eligible for CBS" edit with "Per 8/2025 WSAC Guidance"

"CBS is Not OK to Pay" edit will remain, but the interim report can be submitted with this edit in place.

Reminders

File is uploaded into CSAW
- The file contains the award amount/s and financial aid application transaction # used to award.

CSAW matches the information provided through the file upload to the FAFSA or WASFA transaction # reported.

If the information does not match, there will be an edit to resolve

Data Hierarchy in CSAW

How does CSAW calculate family income and MFI when both FTI and manual income are reported on the FAFSA?

- FTI when present and appears complete and the tax filing status and marital status appear in alignment.
- FTI + manual fields in instances of married filing joint taxes but now separated – using manual fields where updated (recognizing colleges have to resolve instances where there appears to be conflicting information related to these but those will come through in an updated ISIR to WSAC).
- FTI + manual fields in instances of PJ updates to some fields – but where some are left blank in manual entry, but FTI fields exist.
- FTI + manual fields when data has been updated in non-FTI fields but not all fields have been updated.
  - For example, this is often seen with IRA/Pension distributions on FTI, and the rollover data are being manually entered and often corrected

Reminders

Questions about how family size is determined in CSAW?

CSAW is programmed to match the federal guidelines and hierarchy found in Appendix C in the **2025-26 Student Aid Index and Pell Grant Eligibility Guide** found at www.fsapartners.ed.gov.

2025–26

Student Aid Index (SAI)
and Pell Grant Eligibility Guide

Version 1

July 2024

U.S. Department of Education's

Federal Student Aid

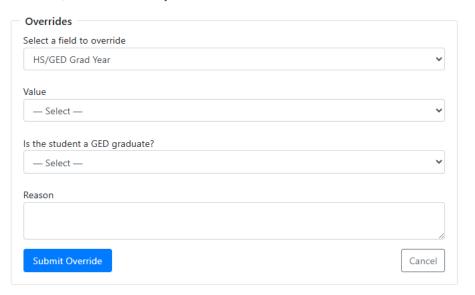# "Student is OK to award, not OK to pay, and hasn't been awarded CBS" edit

- Why does this edit appear?
  - Appears when HS Grad and/or HS 2.0 GPA information needs to be verified in the Checker.

Name	SSN	Birth Date	SID	OK to Award	OK to Pay	HS/GED Grad Year	HS 2.0 GPA	Enrolled By Deadline	Elig. Open	CBS Qtrs Used	CBS Qtrs Remaining	In Repayment	Last Updated
Smith ⧉ Details	👁 •••••			Yes updated 02/21/2025	Verify updated 02/21/2025	Verify estimated 2025, from OSPI	Yes	Verify	Yes	0.00	18.00	No	08/20/2025

Options to resolve "Student is OK to award, not OK to pay, and hasn't been awarded CBS" edit:

- If a high school or GED transcript has been received, override the CBS Eligibility Checker using the HS/GED Grad Year and GPA overrides.

Overrides

Select a field to override

HS/GED Grad Year

Value

— Select —

Is the student a GED graduate?

— Select —

Reason

Submit Override   Cancel

Overrides

Select a field to override

GPA

Value

Value

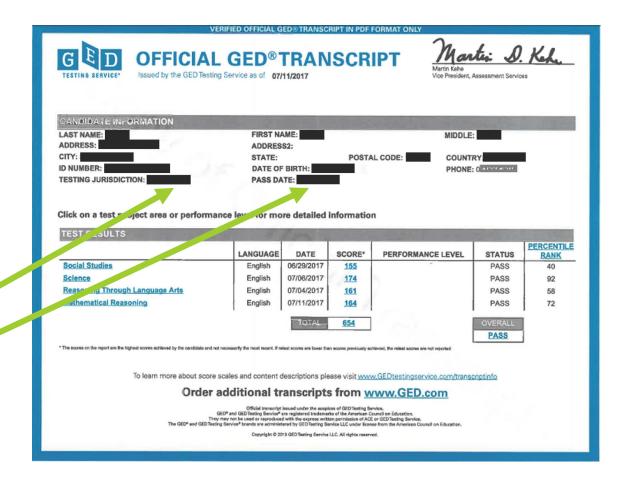Reason

Submit Override   Cancel

Options to resolve "Student is OK to award, not OK to pay, and hasn't been awarded CBS" edit:

- What does a GED transcript look like?
  - Can be ordered at
    https://www.ged.com/transcripts/

- What do you need to override the CBS Eligibility Checker?
  - Testing Jurisdiction (must be WA)
  - Pass Date

Options to resolve "Student is OK to award, not OK to pay, and hasn't been awarded CBS" edit:

- If you have not yet received a transcript (high school or GED) and cannot override the CBS Eligibility Checker, please do the following:

  - Award the student CBS in CSAW and your system
    - If you can do this in offered status in your system, that will prevent disbursement until the information is verified.
    - Do not override the edit if you are still in the process of requesting/receiving a transcript.
  - This will leave the "CBS is not OK to Pay" edit in place – your interim report can still be submitted with it outstanding.

"Student does not have a FAFSA/WASFA on file" edit:

- This edit appears when CSAW cannot match a financial aid application to the student.

  - *Troubleshooting*
    - Student's ID doesn't match what is reported on their application
    - Student hasn't listed your school on their financial aid application
    - Student's transaction number reported does not match a FAFSA or WASFA transaction number that exists.
      - ➤ Example: School reports FAFSA transaction #3 on file upload, but there are only two FAFSA transactions or the student filed a WASFA, and the transaction reported is #1, but WASFA transactions start with #50.

"Student has been awarded WCG and WG-A in the same academic year edit"

- This edit appears when a student who has received WCG at your school has also received WA Grant for Apprenticeship (WG-A) through an approved apprenticeship program.

  - *2 override options*
    - WSAC to verify that the student is not over-awarded between WCG and WG-A.
      - ➢ Please look for email from Apprenticeship and/or WCG with any questions we have.
    - My college paid on adjusted COA - tuition and books only

WASFA Corrections

WASFA Corrections for 2025-26 are Available!!

An email with instructions was sent on 9/18/2025 from wcg@wsac.wa.gov email.

WASFA Corrections

WASFA Corrections for 2025-26 are Available!!

New Process

⭐ Complete WSAC form to get staff registered in the Regent system
- ✓ Name
- ✓ Email
- ✓ IP addresses

⭐ Use Advisor Assist to make WASFA corrections
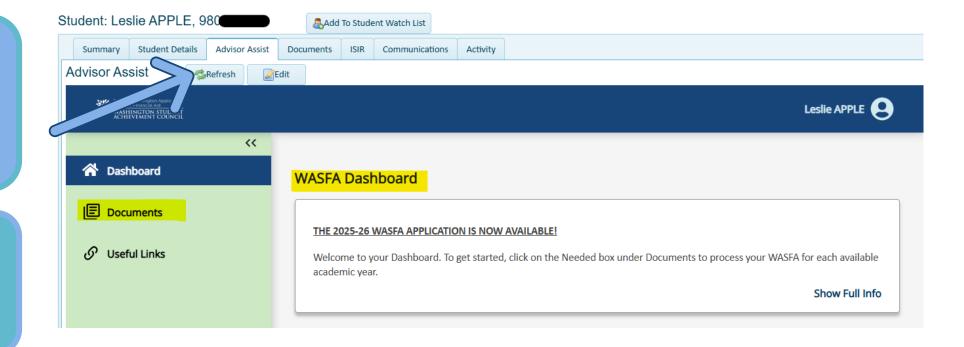
⭐ Corrections will be available for download in the WSAC portal the following business day.

Correcting Multiple IDs

When a student creates multiple WASFA accounts or if a student adds an ITIN or SSN to their application, this will create multiple WASFA IDs

If you find a student has multiple IDs in the portal there are couple steps that must be completed to resolve the issue.

Correcting Multiple IDs

The hierarchy of awarding in CSAW is SSN > ITIN > WASFA ID

Correcting Multiple IDs

1. **If the student has multiple SSN and/or ITIN numbers, confirm which number is correct.**
   - ➤ If the student has a confirmed SSN they should be awarded on that number.
   - ➤ If they do not have an SSN, but have an ITIN, they should be awarded on that number.
   - ➤ If the student doesn't have either, they need to be awarded on their WASFA number.

Correcting Multiple IDs
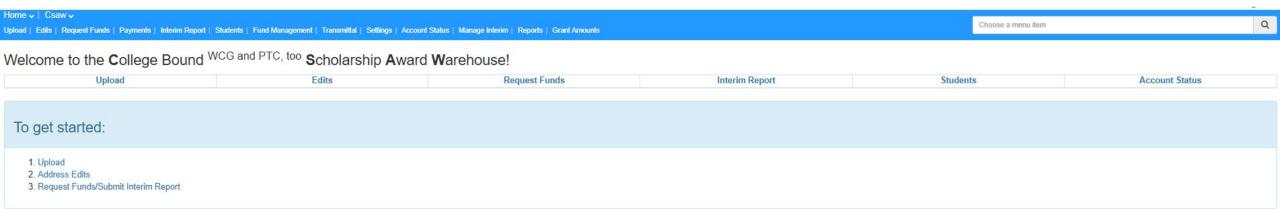
1. Once the correct ID has been determined and the student is awarded in CSAW on the correct ID, any awards are deleted from the incorrect ID, and a duplicate ID still remains - send a secure message to the Washington College Grant inbox via the portal, including the following:
   ➢ Student Name
   ➢ ID that they should be awarded on

2. WSAC will merge the student records

It's Interim Report Walkthrough Time!

Upload | Edits | Request Funds | Payments | Interim Report | Students | Fund Management | Transmittal | Settings | Account Status | Manage Interim | Reports | Grant Amounts

Choose a menu item 🔍

Welcome to the **C**ollege Bound ^{WCG and PTC, too} **S**cholarship **A**ward **W**arehouse!

Upload	Edits	Request Funds	Interim Report	Students	Account Status

To get started:

1. Upload
2. Address Edits
3. Request Funds/Submit Interim Report

Other useful tools:

- Summary of account status: WCG CBS PTC
- Search for students
- Submit a receivable transmittal
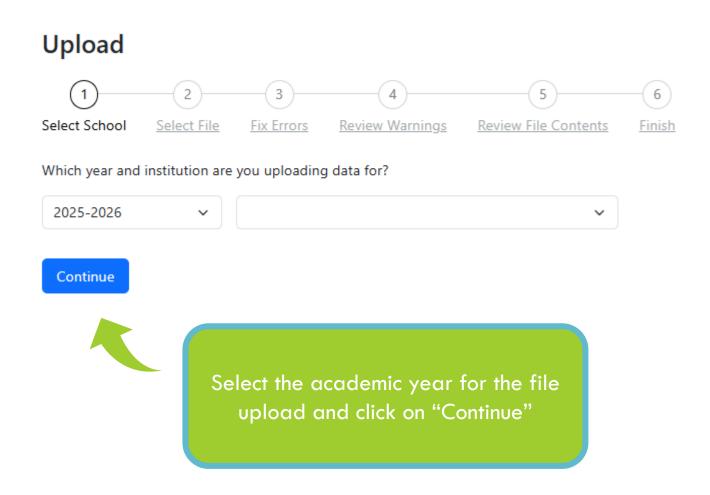
Upload → Resolve Edits → Request Funds → Review Interim Report → Submit

Upload

1	2	3	4	5	6
Select School	Select File	Fix Errors	Review Warnings	Review File Contents	Finish

Which year and institution are you uploading data for?

2025-2026 ▾   ▾

Continue

Select the academic year for the file upload and click on "Continue"

Upload

1. ✓ **Select School**
2. **Select File**
3. *Fix Errors*
4. *Review Warnings*
5. *Review File Contents*
6. *Finish*

Please select the file you would like to upload

Choose File	No file chosen

Only CSV files are supported – Max Size: 10MB

CSV Template

Start over   Continue

Click the "Start over" button anytime to start from the beginning

Choose your file to upload and click on "Continue".

Step 1: Upload Your File

Last step is to review your file contents and make sure it looks correct.

Click the "Confirm" button once you are ready to upload file contents into CSAW.

Upload

✓ Select School — ✓ Select File — ✓ Fix Errors — ✓ Review Warnings — ⑤ Review File Contents — ⑥ Finish

Please carefully review the summary of the file contents. If the summary looks correct, click "Confirm".

This will apply the changes to CSAW and cannot be undone.

0 records marked for deletion.

		Total	Summer 1	Fall	Winter	Spring	Summer 2
WCG	Amount	$20,613,476		$7,078,264	$6,653,954	$6,881,258	
	Total Awards	10050		3429	3274	3347	
	Need Met Awards						
CBS	Amount	$905,700		$305,955	$296,059	$303,686	
	Total Awards	3775		1274	1240	1261	
	Need Met Awards						
PTC	Amount	$104,000		$36,016	$32,016	$35,968	
	Total Awards	152		52	48	52	
	Need Met Awards						

Start over   Confirm

Step 1: Upload Your File

Upload

Select School — Select File — Fix Errors — Review Warnings — Review File Contents — ⑥ Finish

Saving file to database...

Start a new upload

A status bar will appear as your file is saved to CSAW.

Once the file is uploaded, click on "Review Edits"

Upload

Select School — Select File — Fix Errors — Review Warnings — Review File Contents — ✓ Finish

All records have been saved.

Start a new upload   **Review Edits**

Step 2: Resolve Edits

Upload

Select School — Select File — Fix Errors — Review Warnings — Review File Contents — Finish
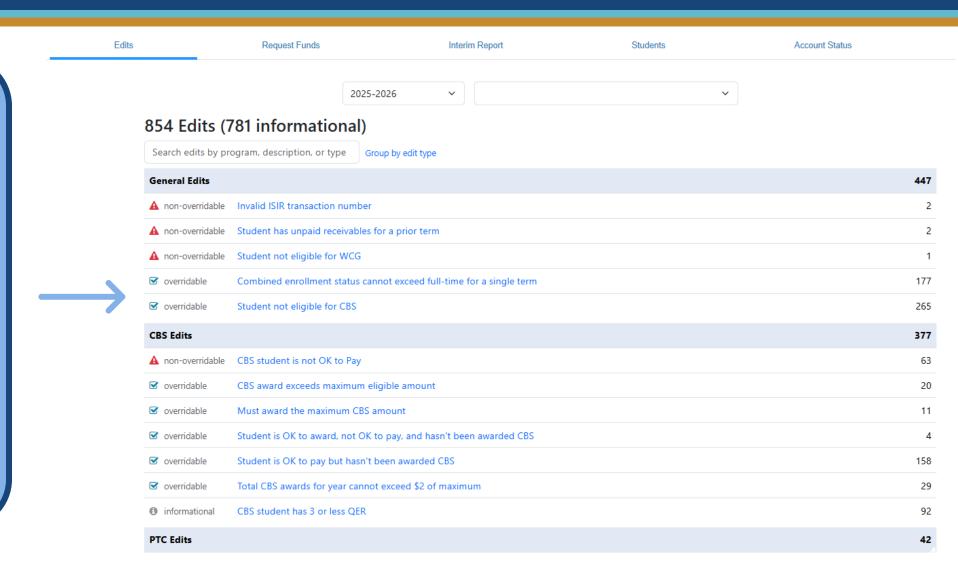
All records have been saved.

Start a new upload   Review Edits

Click on "Review Edits" tab to access any edits that need to be resolved or access the edit menu in CSAW > Edits

Step 2: Resolve Edits

When you access the edits tab, a list of all edits will be there.

Those listed as informational do not have to be addressed to move on with the interim report but are helpful to review.

Click on an edit to view the students associated with the edit.

Edits | Request Funds | Interim Report | Students | Account Status

2025-2026

854 Edits (781 informational)

Search edits by program, description, or type   Group by edit type

General Edits		447
⚠ non-overridable	Invalid ISIR transaction number	2
⚠ non-overridable	Student has unpaid receivables for a prior term	2
⚠ non-overridable	Student not eligible for WCG	1
☑ overridable	Combined enrollment status cannot exceed full-time for a single term	177
☑ overridable	Student not eligible for CBS	265
CBS Edits		**377**
⚠ non-overridable	CBS student is not OK to Pay	63
☑ overridable	CBS award exceeds maximum eligible amount	20
☑ overridable	Must award the maximum CBS amount	11
☑ overridable	Student is OK to award, not OK to pay, and hasn't been awarded CBS	4
☑ overridable	Student is OK to pay but hasn't been awarded CBS	158
☑ overridable	Total CBS awards for year cannot exceed $2 of maximum	29
ℹ informational	CBS student has 3 or less QER	92
PTC Edits		**42**

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Step 2: Resolve Edits

Student not eligible for CBS
☑ overridable

1–15 of 265 items

	SID ⇕	SSN ⇕	Name ▲	Term ⇕	Credits ⇕	WCG ⇕	CBS ⇕	PTC ⇕			
☐	011684128	👁 •••••••		Fall	13.00 credits ⌄	$6,144	$250		Save	Override	Delete Awards
☐	011684128	👁 ••••••		Spring	12.00 credits ⌄	$6,143	$250		Save	Override	Delete Awards
☐	011823412	👁 ••••••		Fall	12.00 credits ⌄	$6,144	$250		Save	Override	Delete Awards
☐	011823412	👁 ••••••		Spring	12.00 credits ⌄	$6,143	$250		Save	Override	Delete Awards
☐	011817708	👁 ••••••		Fall	15.00 credits ⌄	$6,144	$250		Save	Override	Delete Awards
☐	011817708	👁 ••••••		Spring	12.00 credits ⌄	$6,143	$250		Save	Override	Delete Awards
☐	011867202	👁 ••••••		Fall	14.00 credits ⌄	$6,144	$250		Save	Override	Delete Awards
☐	011867202	👁 ••••••		Spring	12.00 credits ⌄	$5,120	$1,273		Save	Override	Delete Awards
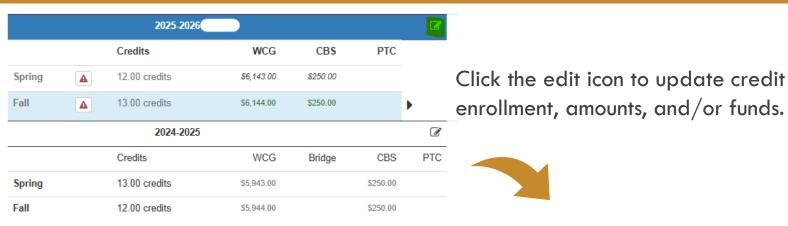
➢ Students' names will populate, and you can click the link to go to their student detail record.
➢ If you know the fix or the override, you can do it directly in the edit screen.
- It is good to review the student detail information.

Step 2: Resolve Edits

Click on the triangle icon in the term detail or academic year to view edit/s.

This is also one area where any override information will be displayed if WSAC rejects an override.

Edits may be term specific
or
Academic year specific

Step 2: Resolve Edits

		Credits	WCG	CBS	PTC
2025-2026					
Spring	⚠	12.00 credits	$6,143.00	$250.00	
Fall	⚠	13.00 credits	$6,144.00	$250.00	▶

	Credits	WCG	Bridge	CBS	PTC
2024-2025					
Spring	13.00 credits	$5,943.00		$250.00	
Fall	12.00 credits	$5,944.00		$250.00	

Click the edit icon to update credit enrollment, amounts, and/or funds.

Make any updates.

Awards

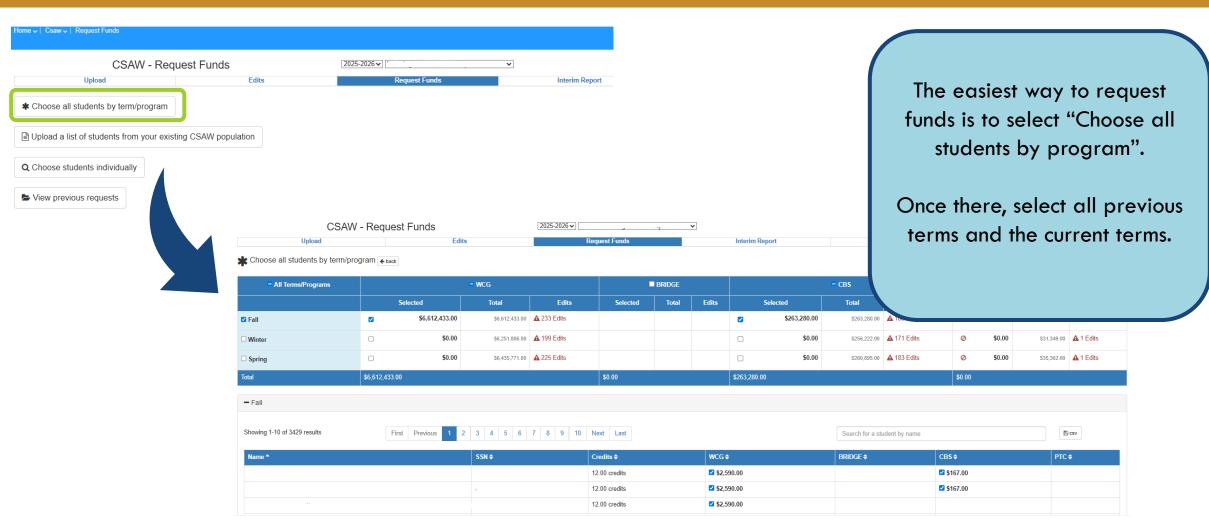|	Credits	Term Type	App Bacc?	WCG	CBS	PTC
Summer 1						
Fall	13.00 credits	Semester	☐	6144 🗑	250 🗑	
Winter						
Spring	12.00 credits	Semester	☐	6143 🗑	250 🗑	
Summer 2						

Click "update student" to save. Once saved, refresh the student detail page and the edit should be gone if resolved. If the edit was not fully resolved, there is more to fix.

cancel   update student

Step 3: Request Funds

The easiest way to request funds is to select "Choose all students by program".

Once there, select all previous terms and the current terms.

Step 4: Request Funds
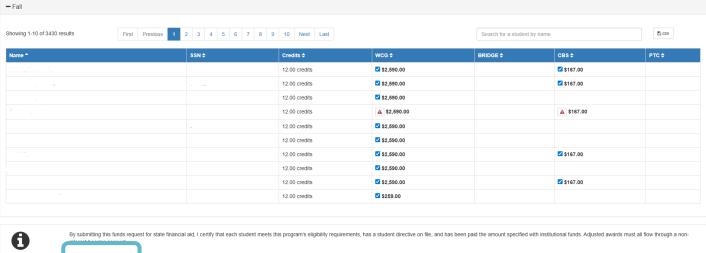
Click on "I Agree, Request Funds".
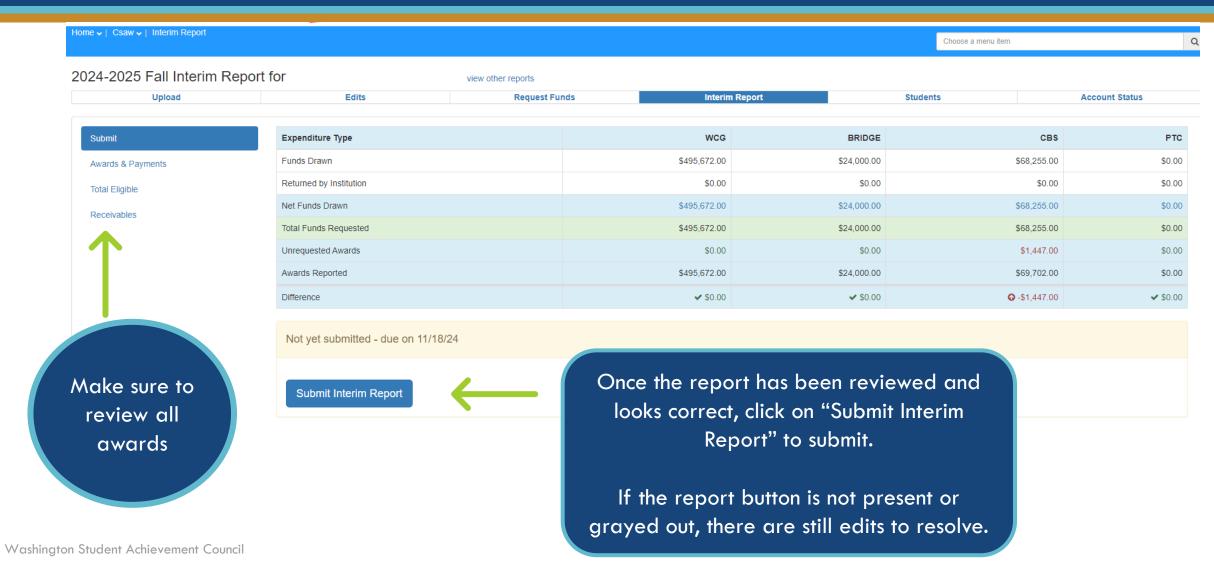
Confirmation of the request will appear. A list of students in that request can be downloaded.

Step 4: Review Report

Choose a menu item

2024-2025 Fall Interim Report for   view other reports

Upload	Edits	Request Funds	Interim Report	Students	Account Status

Submit

Awards & Payments

Total Eligible

Receivables

Expenditure Type	WCG	BRIDGE	CBS	PTC
Funds Drawn	$495,672.00	$24,000.00	$68,255.00	$0.00
Returned by Institution	$0.00	$0.00	$0.00	$0.00
Net Funds Drawn	$495,672.00	$24,000.00	$68,255.00	$0.00
Total Funds Requested	$495,672.00	$24,000.00	$68,255.00	$0.00
Unrequested Awards	$0.00	$0.00	$1,447.00	$0.00
Awards Reported	$495,672.00	$24,000.00	$69,702.00	$0.00
Difference	✔ $0.00	✔ $0.00	⊘ -$1,447.00	✔ $0.00

Not yet submitted - due on 11/18/24

Submit Interim Report

Make sure to review all awards

Once the report has been reviewed and looks correct, click on "Submit Interim Report" to submit.

If the report button is not present or grayed out, there are still edits to resolve.

A confirmation email will be sent to you and to wcg@wsac.wa.gov

Our team will review any overrides and will contact you if there are any changes needed

Interim Reminders

- ✓ Request **payments** before submitting your report for Summer 1 (header) and Fall terms

- ✓ Pay close attention to the due date and start early

- ✓ Ask questions! If you don't understand something, reach out – we're here for you! Email wcg@wsac.wa.gov

Questions?