WASHINGTON STUDENT ACHIEVEMENT COUNCIL

EDUCATION · OPPORTUNITY · RESULTS

2025 Winter Interim Reporting Walkthrough and Q&A

January 2024

Presenter

Carlie Curlee (she/her)

Assistant Director – Need Based Programs

wcg@wsac.wa.gov

360-485-1201

Agenda

- ➢ **Introduction**
- ➢ **Reminders**
- ➢ **Top 3 Fall Interim Questions**
- ➢ **File Upload Options**
- ➢ **Interim Report Process Walkthrough**
- ➢ **Q&A**

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

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

Reminders

Data in fields have been updated with for 2024-25 file layout:

- Enrollment intensity changes

- FTI restrictions

Specifics about data inputs can be found on pages 70 – 74 in the Program Manual

Income is no longer included through the file layout.

- Schools will enter the WASFA or FAFSA transaction number that the student was awarded on in their file upload.
  - ➢ You can edit the transaction number in CSAW
- CSAW will match and display the income information, family size, and MFI that the student's award is based on.

CUI//SP-TAX Family income:	👁 show	CUI//SP-TAX Family size:	👁 show	MFI Category:	65%

  - ➢ You cannot edit income or family size in CSAW

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.

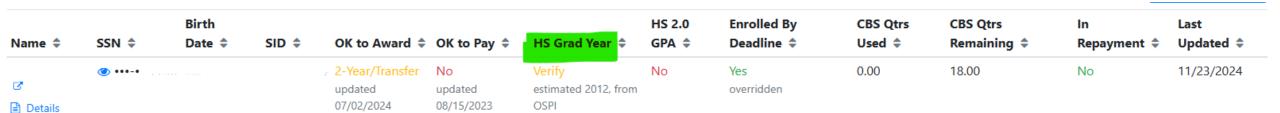**If the information does not match, there will be an edit to resolve**

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

1. How do I resolve the "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 Grad Year	HS 2.0 GPA	Enrolled By Deadline	CBS Qtrs Used	CBS Qtrs Remaining	In Repayment	Last Updated
👁 ••••-•				2-Year/Transfer updated 07/02/2024	No updated 08/15/2023	Verify estimated 2012, from OSPI	No	Yes overridden	0.00	18.00	No	11/23/2024

⤴
📄 Details

1. How do I resolve the "Student is OK to award, not OK to pay, and hasn't been awarded CBS" edit?

   ▪ Schools should be requesting a high school transcript for students in this case if they do not have one on file.

   Options
   1. Update Checker with high school graduation information from transcript or GED documentation (for non-former foster youth)
   2. If no documentation has been received yet, please award CBS. This will resolve the edit and the student will get the "CBS is not OK to Pay" edit. **The interim report can be submitted with this edit.**

Top 3 Fall Interim Questions

1. How do I resolve the "Student is OK to award, not OK to pay, and hasn't been awarded CBS" edit?

RESOURCES:
- Program Manual pages 22-31

2. Why doesn't CSAW's calculation of family income/MFI match our calculated family income/MFI?

Top reasons that this may exist

1. Your institution didn't use income offsets, so WSAC calculated amount is lower.
   a. Solution: Override using "Not excluding income offsets-not awarding Bridge or CBS"

2. You awarded their aid on a different transaction than what is reported in CSAW.
   a. Solution: Update transaction number to match calculated award in the student detail record.

2024-2025

Student ID #:   not specified   ISIR/WASFA Trans #:   1

3. What do we do if a student has a different ID on their WASFA application this year than last year?

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.

3. What do we do if a student has a different ID on their WASFA application this year than last year?

1. If the student has multiple SSN and/or ITIN numbers, confirm what number is correct.
    ➢ If the student has a confirmed SSN they should be awarded on that number.
    ➢ If they do not have a 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.

2. Once the correct ID has been determined and student is awarded in CSAW on the correct ID, 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

3. What do we do if a student has a different ID on their WASFA application this year than last year?

3. WSAC will merge the student records.

4. Once corrections are available in the portal: update student's WASFA application/s to match the correct ID by doing the following:

➢ Log into portal and go to Programs > WASFA. Click on   .

➢ Update the SSN or ITIN to match the ID. For example:

   i. Student's WASFA ID is 000-00-0000 and confirmed SSN is 123-45-6789, you would update the SSN section to 123-45-6789

   i. Student has two WASFA IDs – 123456789 and 987654321. Student's newest application has 987654321, you would update the SSN section on the application with 123456789 to the WASFA ID to 987654321

True or False: I can upload a file into CSAW any time during the academic year, not just during the interim reporting period once the portal opens for that academic year.

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

Incremental file upload

Incremental file upload allows you to load partial student data instead of a full file, also called a change-only file, as well as full student data.

The incremental file requires that you add 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.
  - Similar to the Unit Record Report

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

Incremental File Upload vs. Full File Upload

Incremental File

Only deletes records if "Y" is in "IsDelete" column for specific student. Only changes student information if they are included in file.

Do not need to re-do edits for students that go unchanged.
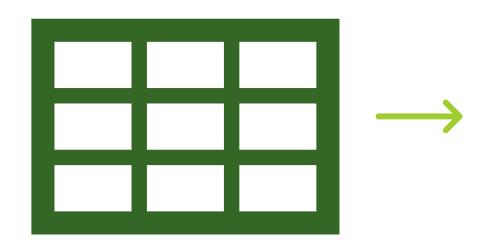
VS

Full File

Is a fresh start every upload. Will delete all existing data and apply data in file.

Must re-do edits for all students if issues are the same as last upload.

File Layout Template

Found at

www.wsac.wa.gov/faa-resources

Use incremental file layout.

RESOURCES FOR FINANCIAL ASSISTANCE ADMINISTRATORS

administration » financial aid administration » faa resources

Administrative Guidance

Program Guidance	2024 Legislative Session	Residency
COVID-19 Guidance	Program Manuals, MFI & Award Charts	

Program Manuals, MFI & Award Charts

- Passport to Careers Program Manual (2024-25) (2023-24).
- Washington College Grant, Washington Bridge Grant, and College Bound Scholarship Program Manual (2024-25) (2023-24).
  - MFI Chart for WCG, Bridge Grant, and College Bound Awarding (2024-25). (2023-24).
  - Maximum WCG, Bridge Grant, and College Bound Awarding (2024-25). (2023-24).
  - Enrollment Intensity Charts (2024-25).
  - CSV sample file for CSAW Interim Reports (full upload) (2023-24).*
    - No longer available for 2024-25.
  - CSV sample file for CSAW Interim Reports (incremental uploads) (2024-25).

File Layout Template

And in the Portal at CSAW > Upload

CSAW - Upload   2024-2025 ⌄

Upload	Edits	Request Funds

PLEASE NOTE: Each *Full* upload attempt represents a **FRESH** start. This means that each *Full* upload must contain **ALL** enrollment data for the current academic year.

For *Incremental* uploads, only include records that are **changed**, **added** or **deleted**. Use the "incremental upload" template.

Choose File   No file chosen

incremental upload csv template ℹ   full upload csv template ℹ

It will be discontinued after winter interim reporting.

Washington Student Achievement Council

It's Interim Report Walkthrough Time!

Home ∨ | Csaw ∨

Upload | Edits | Request Funds | Interim Report | Students | Transmittal | Account Status | Reports | Grant Amounts | Grant Repayment Calculator

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
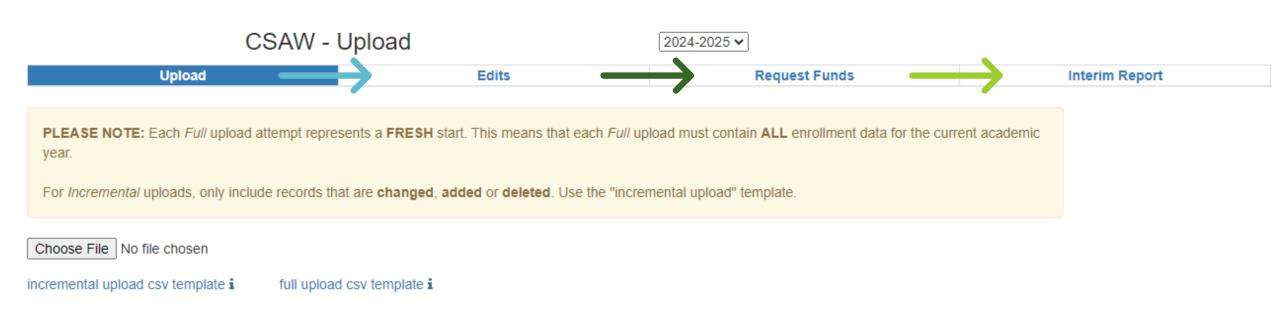- Search for students
- Submit a receivable transmittal

Interim Process

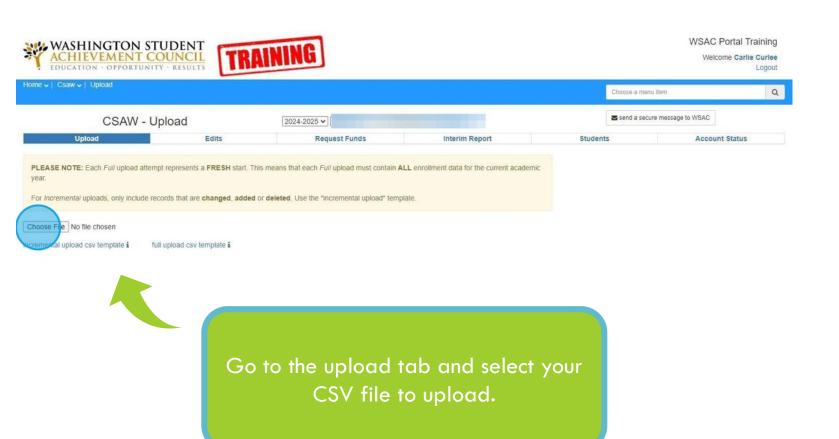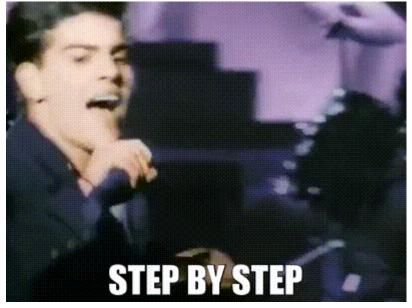Upload → Resolve Edits → Request Funds → Review Interim Report → Submit

The order of the tabs in CSAW is the order to complete the interim reporting process.

Step 1: Upload Your File

Go to the upload tab and select your CSV file to upload.

Step 2: Save Your Upload

Bridge	Amount	$281,000.00	$40,497.00	
	Total Awards	1820	258	
	Need Met Awards	0	0	
CBS	Amount	$60,507.00	$4,962.00	
	Total Awards	378	42	
	Need Met Awards	0	0	
PTC	Amount	$26,131.00	$6,531.00	
	Total Awards	28	7	
	Need Met Awards	0	0	

Save upload   Discard upload

CSAW will display a summary of the awards uploaded. If everything looks correct, scroll down to click "Save upload".

Step 3: Edits

Click on "Address Edits" or the "Edits" tab to access any edits that need to be resolved.
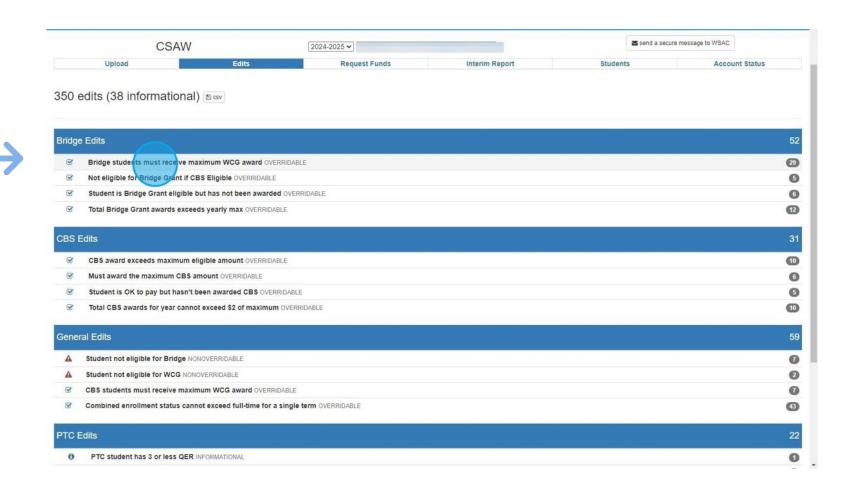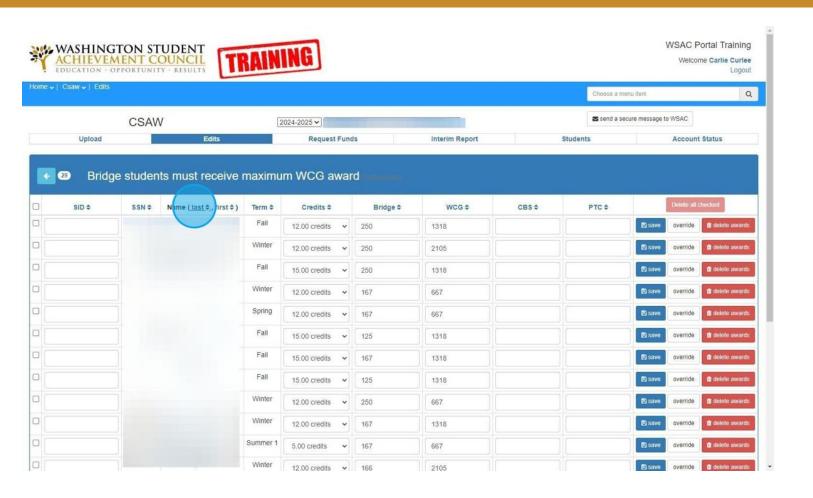
Step 3: Edits

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.

Step 3: Edits

- Students' names will populate, and you can click the link to go to their student detail record.
- Sorting by last name can be helpful
- 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.
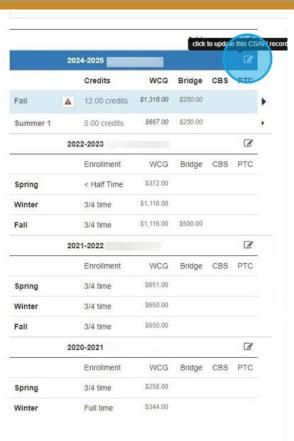
Step 3: Edits

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

This is also where any override information will be displayed if WSAC doesn't approve an override.

Edits may be term specific
or
Academic year specific

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

App Bacc?	WCG		Bridge		CBS	PTC
☐	667	🗑	250	🗑		
☐	1318	🗑	250	🗑		

Make any updates.

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

ivable

Edits to be aware of for interim reporting:

- **NEW** "Student does not have a FAFSA/WASFA on file"
  - 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 only two FAFSA transactions or the student filed a WASFA,   and the transaction reported is #1, but WASFA transactions start with 50.
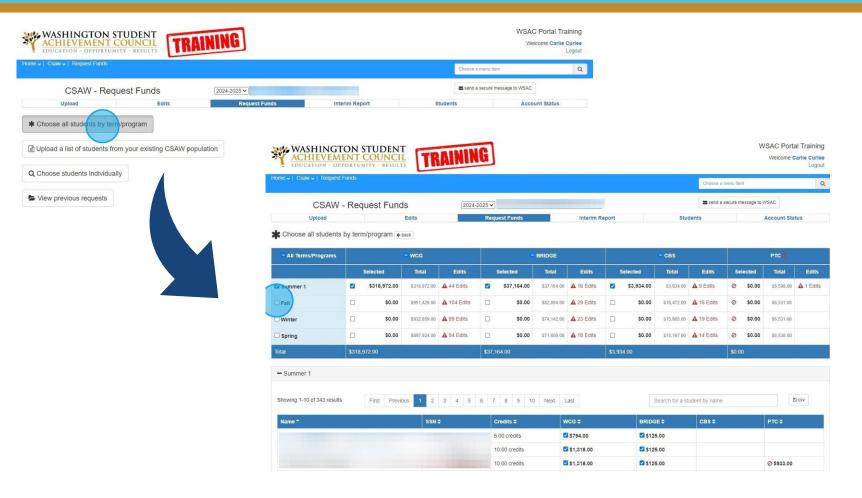
Edits to be aware of for interim reporting:

- "The student has been awarded WCG and WG-A in the same academic year"
  - This edit appears when a student who has received WCG at your school, has also received WA Grant for Apprenticeship through an approved apprenticeship program.
    - *2 override options*
      - WSAC to verify that the student is not over-awarded between WCG and WG-A.
      - My college paid on adjusted COA - tuition and books only

Step 4: Request Funds

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

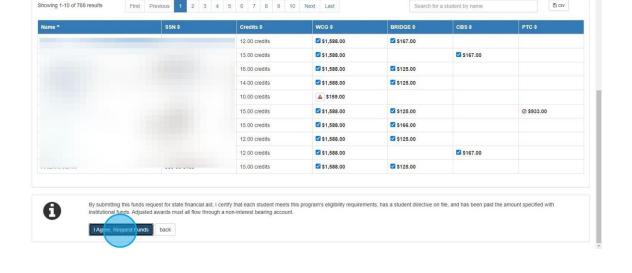Once there, select all previous terms and the current terms.

For the winter interim report, this would be Summer 1 (if applicable) Fall, and Winter terms.
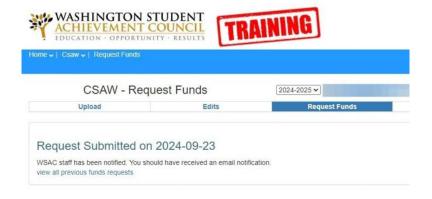
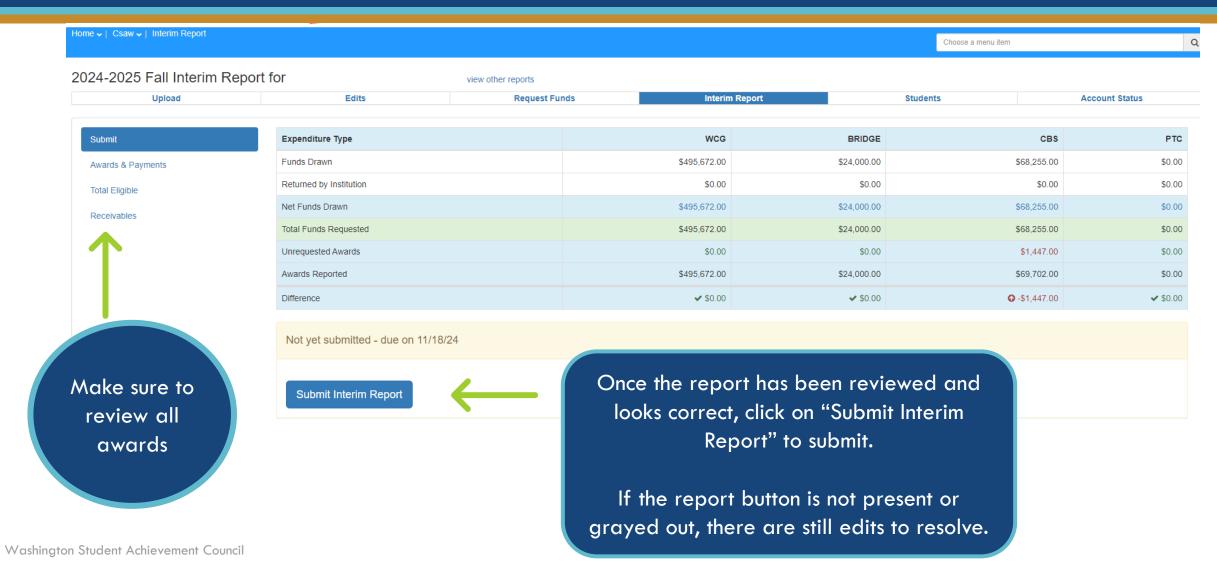# Step 4: Request Funds

Click on "I Agree, Request Funds".

Confirmation of the request will appear. A list of students in that request can be downloaded.

Step 5: Submit 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.

Washington Student Achievement Council

Step 5: Submit Report

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

- ✓ Request all payments before submitting your report (Summer 1, Fall, and Winter terms)

- ✓ If there is an owing balance, you do not need to submit a payment to WSAC. Owing balances are reconciled after the final interim.

- ✓ 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?