WASHINGTON STUDENT ACHIEVEMENT COUNCIL

EDUCATION · OPPORTUNITY · RESULTS

UNIT RECORD REPORT MANUAL
2020-21 ACADEMIC YEAR

JUNE 2021

UNIT RECORD REPORT
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Unit Record Report Manual
Overview and Updates

</div>

OVERVIEW

The Unit Record Report (URR) is a student-specific report of financial aid awarded to resident and nonresident students attending the Washington institutions that participate in the Washington College Grant (WCG, formerly known as the State Need Grant) program. It provides comprehensive information on federal, state, private, and institutional financial aid distributed to need-based financial aid recipients. The report also includes information about federal borrowing for non-need-based loan recipients.

Unit Record Report History

The Unit Record Report (URR) was developed in response to 1969 legislation, which created the State Need Grant program (now known as Washington College Grant, or WCG) and called for ongoing analysis of student financial aid. The first URR was collected in 1972. Every institution that participates in the WCG program is required to complete the URR at the conclusion of each fiscal year.

The office of student financial assistance within the Washington Student Achievement Council (WSAC) has authority to collect the URR according to the following statute:

> RCW 28B.92.040. "… (1) The office shall be research oriented, not only at its inception, but continually through its existence. … (3) The office shall take the initiative and responsibility…to ensure that the state recognizes the maximum potential effect of these programs, and shall design state programs that complement existing federal, state, and institutional programs…"

Compliance with the Family Educational Rights and Privacy Act (FERPA)

Federal regulations (34 CFR 99.31(a)(3)(iv)) authorize institutions to disclose personally identifiable information on the URR without the student's consent. This authority is based on WSAC's statutory charge, as cited above, and the need for student-specific information to carry out WSAC's administrative and research responsibilities.

As required by 34 CFR 99.35(a)(1), WSAC ensures that use of the URR data will not permit identification of students to individuals other than authorized representatives of WSAC.

Unit Record Report Uses

Student-level data with term-by-term program-specific financial aid information is needed by WSAC to conduct research; design state financial aid programs that complement other existing federal, state, and institutional programs; describe recipient populations; and administer and evaluate state financial aid programs as required by state law.

The URR is the primary data source used by WSAC to comply with these statutory requirements.

Data from the URR are used to:

- Provide financial aid data to the Education Research and Data Center (ERDC). These data, in combination with academic and workforce records, may be used by WSAC staff and other researchers to conduct longitudinal research on the educational and occupational achievements of financial aid recipients.

- Analyze the adequacy of financial aid resources available to financially needy Washington students.

- Describe funding trends and the characteristics of students receiving various types of financial assistance.

- Estimate funding needs and support budget requests for state-funded financial aid programs.

- Estimate the impact of new financial aid programs, changes in program policies, and altered funding levels.

- Contribute to student financial aid policy analysis and program evaluation.

- Respond to legislative requests for information about student financial aid programs available to Washington students.

The URR significantly reduces the number of ad hoc data requests institutions receive.

Use of Unit Record Report for Research Purposes

WSAC has expanded the scope of data uses for the URR. Data-sharing requirements were established with House Bill 2261 (Chapter 548, Laws of 2009), which added new sections to RCW 43.41.400, to answer "critical questions" from various stakeholders and policymakers and non-critical questions developed by the general public.

This action requires the ERDC at Office of Financial Management (OFM) to gather P-20 data for public colleges and universities in order to conduct longitudinal data analysis.

Data-sharing agreements have been developed to permit sharing of URR data to the P-20W warehouse at OFM on behalf of the public institutions. URR data for private institutions will not be disclosed to OFM without consent.

CHANGES OR EMPHASIS IN 2020-21 UNIT RECORD REPORT

The list below details the changes in field or record requirements in the 2020-21 URR. For additional guidance and instructions for these fields, see Chapter 2: Data Definitions; and Appendix B: Record Layout, unless otherwise indicated.

- Field changes to the URR .csv header file. Make note of the following changes to the .csv header and download the revised sample from WSAC's Unit Record Report web page before creating your institution's URR upload file. New programs will report for the five academic term fields in which funds may be disbursed.

    - New Fields:
        - RejectedISIRWASFA
        - NationalGuardGrant *
        - AlternativeRoutes
        - Paraeducator
        - TeacherShortageConditionalScholarship
        - VABenefit

        * FYI - The National Guard Grant awards may trigger an overrideable edit as WSAC implements the payment system in the Portal. The award match may not be fully in place at time of URR submissions.

    - Deleted Field:
        - TeacherConditionalScholarshipPrograms

- Change in **valid input range** before edits are produced:
    - Pell Grant – Valid input range is 0 to 9518 (formerly 0 to 9293)
    - Passport to College Scholarship – Valid input range is 0 to 6667 7500 (formerly 0 to 6750)
    - National Guard Grant – Valid input range is 0 to 11540
    - Alternative Routes – Valid input range is 0 to 8000
    - Paraeducator – Valid input range is 0 to 4000
    - Teacher Shortage Conditional Scholarship – Valid input range is 0 to 8000
    - Teacher Grant Programs – Valid input range is 0 to 8000 (formerly 0 to 10000)
    - WSOS Career Tech – Valid input range is 0 to 10000 (formerly 0 to 6000)
    - VA Benefit – Valid input range is 0 to 99999 (default maximum)

- Several state funded teacher programs formerly reported under the TeacherConditionalScholarshipPrograms category will now be reported separately under their respective program name categories:

    - [Alternative Routes to Teaching Certification](#)
    - [Pipeline for Paraeducators](#)
    - [Teacher Shortage Conditional Scholarship](#)

- The [Student Teaching Grant](#) program will continue to be reported under the [TeacherGrantPrograms](#) category.

- A new [Gender](#) option has been added to the URR. Valid entries for this field now include: Male, Female, X/Non-binary, and Unknown.

- **Reminder:** Do not report federal and state COVID-related student relief emergency funds in the URR for the 2020-21 academic year. This affects federal CARES/HEER dollars (for example, emergency FSEOG), and the state COVID-emergency funds for undocumented students.

- **Reminder**: Institutions may test their upload file in the Portal training environment prior to upload to the live URR Portal. The data uploaded or manually entered into the training site is temporary and clears if left overnight.

    By using the training environment, institutions may find and make corrections to data edits in the upload file before attempting to make a final URR Portal submission in the live site. The training website is located at:

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

EARLY ANNOUNCEMENT: CHANGES UNDER CONSIDERATION FOR 2021-22 UNIT RECORD REPORT

WSAC plans to overhaul the URR portal to a 3.0 version for the 2021-22 reporting cycle. WSAC is conducting preliminary discussions internally among the URR, Research, and IT Teams. WSAC will reach out to institutions soon to incorporate institutional user comments and feedback as the project moves forward.

UNIT RECORD REPORT 2020-21 TIMELINE

August 2021:   Unit Record Report training webinars. WSAC will announce specific times and dates during the summer.

August 9, 2021:   Unit Record Report Application available for initial upload of data into the WSAC Secure Portal.

October 11, 2021:   **Unit Record Report final submission date.**

October/November 2021:   WSAC staff data editing and review.

December 2021:   Unit Record Report data finalized.

January 2022:   Unit Record Report Institutional Profile reports available for 2020-21 year.

Institutions must submit complete and accurate data by the due date to meet the reporting deadline. WSAC staff members are available for assistance if problems arise during the reporting process.

Institutions that do not meet this deadline, or that do not follow up promptly with necessary corrections, will be considered not to have met minimum administrative capability requirements. Those institutions may be placed in a probationary or terminated status for participation in state financial aid programs.

Due Date for Unit Record Report: October 11, 2021

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2020-21 ACADEMIC YEAR

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CHAPTER 1 – GENERAL INSTRUCTIONS

Students to be Included

Need-Based Recipients

Submit one record for each student at your institution who received any need-based financial aid, regardless of source. This includes Washington residents and nonresidents. Report all aid, including non-need-based aid sources, for any student who received at least one form of need-based aid. All data for need-based recipients will go through a series of edits to help ensure accuracy of reported data.

Appendix A identifies the financial aid programs and aid types WSAC considers as need-based for the URR. Further, the programs are differentiated by whether 2020-21 Free Application for Federal Student Aid (FAFSA) or Washington Application for State Financial Aid (WASFA) data are required to be submitted:

- **Need-Based Recipients (FAFSA or WASFA required):** All 2020-21 FAFSA or WASFA data must be reported for all students receiving any aid shown in Appendix A as "Need-Based (FAFSA or WASFA data required)."

- **Need-Based Recipients (FAFSA or WASFA optional):** If available, all 2020-21 FAFSA or WASFA data must be reported for all students receiving any aid shown in Appendix A as "Need-Based (FAFSA or WASFA data optional)."

FAFSA or WASFA data submission requirements are described in more detail in Chapter 2.

Non-Need Based Federal Loan Recipients

Also, submit one record for each student at your institution who received non-need based federal loans from these programs: Federal Direct Unsubsidized Loans, Federal Parent PLUS Loans, and Federal Grad PLUS Loans.

Reporting Period

Report financial aid disbursed during the 2020-21 academic year. For need-based recipients this will include all academic and summer terms for which 2020-21 FAFSA or WASFA data are used. Aid reported may include summer 2020 funding and/or summer 2021 funding. You will find included in Chapter 2 specific information regarding which summer aid term(s) to report.

Information To Be Reported

Please ensure you are reporting the data from the most recent ISIR or WASFA transaction used to base the student's award. This may or may not be the newest FAFSA or WASFA on record.

Reporting Application

URR data collection takes place through the WSAC Secure Portal. This tool allows each institution to enter and edit data before submitting the final report to WSAC.

The Portal is available at https://portal.wsac.wa.gov/. Chapter 3 contains detailed instructions for using the URR application.

Entering and editing data are an institutional responsibility. WSAC staff will provide technical assistance as needed to any institution experiencing problems with the application.

WSAC staff make every effort to ensure the accuracy of URR data. Notify WSAC staff to initiate any necessary data correction if your institution anticipates or identifies any errors after submitting the final report.

General File and Data Formats

Data files must be in CSV format. A sample CSV file with required header labels is available on the WSAC website at: www.wsac.wa.gov/unit-record.

Report all financial aid fields as integers. Round decimals to the nearest whole number. Round down for decimals from .1–.49999 and round up for decimals from .5–.99999.

Refer to Chapter 2 and Appendix B for valid field values.

All numbers provided must be positive numbers or zero '0' with the exception of the Family Income field only. Negative numbers are acceptable in the Family Income field, as necessary.

Uploading the CSV File

When uploading your CSV file, do not include spaces in the header row descriptions (e.g., Last Name will need to appear in the header row as LastName).

The upload will fail if the CSV file format is incorrect or does not contain all expected data elements. In that case, the system will provide information to assist in identifying any errors or omission for correction in the upload process.

Refer to Appendix C for a list of system edits that prevent file upload and import.

Once a file uploads correctly, the system will review all records for valid values.

Testing the Upload File

Institutions may test their upload file in the Portal training environment prior to uploading to the live URR Portal.

The data uploaded or manually entered into the training site is temporary and clears if left overnight. By using the training environment, institutions may identify necessary data edits and make corrections to the upload file before attempting to make a final URR Portal submission in the live site. The training website is located here:

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

Profile Reports

After the URR team has reviewed and finalized data from each institution, WSAC will release the 2020-21 profile reports to each institution via the URR application. Profile reports provide descriptive and summary statistics by state, sector, and institution for students who received need-based aid.

CHAPTER 2 – DATA DEFINITIONS

Before You Begin

Please review the contents of this chapter and Appendix B (File Format) to minimize errors during the submission process. Field names in this chapter are hyperlinked to the corresponding field names in Appendix B.

The order of presentation in this chapter generally follows the order of the File Format. The File Format also specifies which fields are required for each type of aid recipient. The following list shows items required for all recipients reported:

Required Fields for All Recipients:
- SSN (Social Security Number) or see below for alternatives
- Last Name
- First Name
- Gender
- Is State Resident
- Year In School
- Rejected ISIR WASFA
- Enrollment Status (for all five terms)
- Financial Aid Received (for all five terms for all programs)

General and Demographic Information

SSN

The student's nine-digit Social Security Number. Do not use spaces. Hyphens may be used. No duplicate Social Security Numbers allowed.

- **Students Reported in CSAW** – This should be the same SSN or identification number as reported in the WCG and CBS College Bound/WCG Award Warehouse (CSAW) record. The order of preference is as follows:
  - Social Security Number
  - Nine-digit tax identification number
  - WASFA applicant identification number (check WASFA Portal page; begins with '980')

  Institutions will receive an error edit at upload for those SSNs whose data do not match previously reported CSAW data. SSNs that are reported in CSAW but do not appear in the Unit Record Report will be shown as differences in the WCG/CBS/Passport Differences Report.

- **Students Not Reported in CSAW** – When reporting data for a student that does not appear in the WCG and CBS CSAW record, populate the SSN field by entering the nine-digit number used in your institutional reporting.

Institution Student ID
Public baccalaureate institutions: Use the nine-character PCHEES Student ID (element number PCH-E0310) as the first nine characters. Use leading zeros if the number is fewer than nine characters. You may add additional characters up to 50 characters. This field is required for public institutions but is overrideable.

Community and Technical Colleges (CTCs): Use the nine-character, college-assigned student identification number (SID) as the first nine characters (include leading zeroes). You may add additional characters up to 50 characters. This field is required for public institutions but is overrideable.

Private institutions: You may use the identification number assigned to the student by the institution. The field is optional and may remain blank.

Last Name
Student's last name. If a student only has a first name, report that name as first name and last name.

First Name
Student's first name. If a student only has a last name, report that name as first name and last name.

Middle Name
Student's middle name or initial.

Date of Birth
Report date of birth using standard numerical U.S. date format: mm/dd/yyyy. The date should be in the range of 01/01/1946 to 12/31/2006. **NOTE:** 01/01/1982 (leading zeroes for month and day) and 1/1/1982 (no leading zeroes for month and day) are both acceptable formats. This is a required field when reporting FAFSA-based (and WASFA) aid types.

Gender
Report one of the following codes:

'1' or 'Male'	'3' or 'Unknown' (not permissible for FAFSA filers)
'2' or 'Female'	'4' or 'X/Non-binary'

Is State Resident
Public Institutions: A "Washington resident" is defined as any student classified by the institution as a Washington resident for fee-paying purposes (RCW 28B.15.011-013 and Chapter 250-18 WAC).

Private Institutions: "Washington resident" is defined as a student who meets the residency requirements for the purposes of the WCG program. If residency has not been determined for state-funded financial aid programs, and the student is not receiving state financial aid, you may use the student's permanent mailing address for reporting residency on the URR.

Report one of the following codes:

Washington Resident: 'y' or 'true'   Nonresident: 'n' or 'false'

Year in School (Click here to return to Contents)

Report the student's status as of the beginning of the term for which the last financial aid disbursement was made for the 2020-21 URR year. This is from the institution's official records. Do not use FAFSA or WASFA to populate this field.

> ***Example 1:*** Student was classified as a sophomore in the fall term and received a disbursement. After the fall term, the student's classification changed to that of a junior. The student was classified as a junior at the final disbursement. Report this student as a '3' or 'junior/3rd year'.

> ***Example 2:*** Student was classified as a freshman at the beginning of the last term for which a 2020-21 disbursement was made. After this term was completed, the student had earned enough credits to enroll as a sophomore for the next term. Report this student as a '1' or 'freshman/1st year'.

Report one of the following codes:

> **'1' or 'Freshman/1st Year'** – Matriculated students with 0–44 quarter, or 0–29 semester, credit hours enrolled in two-year or four-year degree programs; or first-year students at vocational-technical or proprietary institutions. Do not include below 100-level remedial courses in determining credit hours.

> **'2' or 'Sophomore/2nd Year'** – Matriculated students with 45–89 quarter, or 30–59 semester, credit hours enrolled in four-year degree programs; or 45 or more quarter hours for students at CTCs enrolled in two-year degree programs; or second-year students at vocational-technical or proprietary institutions.

> **'3' or 'Junior/3rd Year'** – Matriculated students with 90–134 quarter, or 60–89 semester, credit hours enrolled in four-year degree programs. Include students who are in the first year of an applied bachelor's program if they have completed an associate degree program.

> **'4' or 'Senior/4th Year'** – Matriculated students with 135 or more quarter, or 90 or more semester, hours enrolled in four-year degree programs. Include students who have not completed their degree program after the fourth year of a four-year program. Also, include students in the fifth year of a five-year bachelor's program. Include students who are in the second year of an applied bachelor's program if they have completed an associate degree program.

> **'5' or 'Unclassified/5th Year'** – Students who hold a bachelor's degree and were not enrolled in a program leading to a graduate degree (master's or doctoral) or a

graduate-level certificate. Include students who are working on a second bachelor's degree. Also, include students with a bachelor's degree who are getting an associate degree. Use code '8' to count non-matriculated students without a bachelor's degree.

'6' or 'Graduate' – Students who hold a bachelor's degree and are enrolled in a program leading to a graduate degree (master's or doctoral).

'7' or 'Professional' – A student enrolled in any of the following degree programs: Chiropractic (D.C. or D.C.M.), Dentistry (D.D.S. or D.M.D.), Law (L.L.B. or J.D.), Medicine (M.D.), Optometry (O.D.), Osteopathic Medicine (D.O.), Pharmacy (Pharm.D.), Podiatry (D.P.M., D.P., or Pod.D.), Theology (M.Div., M.H.L., B.D., or Ordination), or Veterinary Medicine (D.V.M.).

'8' or 'Other' – Non-degree, non-matriculated, high school completion, or other students who cannot be classified as any of the above. This category includes Running Start and other students for whom need-based aid is reported but who have not yet graduated from high school.

Race/Ethnicity

The race and ethnicity categories in the URR reflect the U.S. Census Bureau data format adopted by the state's Office of Financial Management (OFM).

Hispanic origin is the only ethnicity category reported in the URR. The race categories in URR include: American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Pacific Islander, White, and Other. You may report two or more races.

Report all race and ethnicity data, if available, to eliminate reporting gaps. Leave blank only if race or ethnicity information is not available or unknown. NOTE: The Portal will interpret all blank race or ethnicity fields as 'n' or 'false.'

Is of Hispanic Origin

A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race. Report one of the following codes:

Yes: 'y' or 'true'

No: 'n' or 'false'

Leave blank only if race or ethnicity information is not available or unknown.

Is Race American Indian or Alaska Native

A person having origins in any of the original peoples of North and South America (including Central America) who maintains cultural identification through tribal affiliation or community attachment. Report one of the following codes:

Yes: 'y' or 'true'

No: 'n' or 'false'

Leave blank only if race or ethnicity information is not available or unknown.

Is Race Asian

A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian Subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam. Report one of the following codes:

Yes: 'y' or 'true'

No: 'n' or 'false'

Leave blank only if race or ethnicity information is not available or unknown.

Is Race Black or African American

A person having origins in any of the black racial groups of Africa. Report one of the following codes:

Yes: 'y' or 'true'

No: 'n' or 'false'

Leave blank only if race or ethnicity information is not available or unknown.

Is Race Native Hawaiian or Pacific Islander

A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands. Report one of the following codes:

Yes: 'y' or 'true'

No: 'n' or 'false'

Leave blank only if race or ethnicity information is not available or unknown.

Is Race White

A person having origins in any of the original peoples of Europe, the Middle East, or North Africa. Report one of the following codes:

Yes: 'y' or 'true'

No: 'n' or 'false'

Leave blank only if race or ethnicity information is not available or unknown.

Is Race Other

Report students in this category only if students have explicitly identified with a **race** not listed above. Do not report Hispanic **ethnicity** in this category. Report one of the following codes:

Yes: 'y' or 'true'

No: 'n' or 'false'

Leave blank only if race or ethnicity information is not available or unknown.

FAFSA, WASFA, and Need-Related Fields

The following additional fields are required for need-based aid recipients with a 2020-21 FAFSA or WASFA on file.

- ISIR or WASFA Transaction Number

- Marital Status

- Is Dependent

- Family Size

- Number in College

- Family Income

- Expected Family Contribution (EFC)

- Cost of Attendance (COA)

- Need Duration

- Need Amount

If the financial aid administrator made any adjustments (e.g., due to verification, updates from the student, or professional judgment decisions), the revised information should be reported based on the corrected/reprocessed application.

> *Example 1:* The student filed the FAFSA or WASFA as a dependent student. The financial aid administrator later documented a professional judgment decision that changed the student's dependency status to independent. In this case, report the student as "independent."

> *Example 2:* The student's family income for 2018 reported on the FAFSA or WASFA was $82,000. The student and parents petitioned to the financial aid office that the family income would be $55,000 for 2020 due to a lengthy period of unemployment. The income adjustment was approved and was used to determine eligibility. In this case, report $55,000 as the family income.

These data are optional for non-need based federal loan recipients who did not receive need-based financial aid. After finalizing the URR, WSAC will delete unnecessary FAFSA or WASFA non-aid related data from all non-need-based loan recipient records.

ISIR WASFA Transaction Number

Report the most recent ISIR or WASFA records transaction number that was used to award aid to the student for the year. Generally, this data should match student data entered in CSAW. This field may be left blank only if the RejectedISIRWASFA field is 'y' or 'true' as defined in the descriptor for the RejectedISIRWASFA field, below, AND the student received no need-based aid.

Rejected ISIR WASFA

This is a required field for all student records reported in the URR. A blank in this field will prevent the URR file from upload.

Valid inputs are:

'y' or 'true'   Rejected ISIR or WASFA only, or none on file

'n' or 'false'   A valid ISIR or WASFA exists

'Y' or 'true' means that the individual does not have a valid ISIR or WASFA on file (rejected status), or that no FAFSA or WASFA was filed, **AND** the student was awarded only non-need based aid during the academic year as a result. A 'y' or 'true' in this field together with need-based aid reported for the individual will trigger an edit.

An 'n' or 'false' entry means that the individual has a valid ISIR or WASFA on file, and the transaction number used to award aid is reported in the ISIRWASFATransNumber field.

Marital Status
Report one of the following codes:

'1' or 'Unmarried' (including single, divorced, or widowed)

'2' or 'Married'

'3' or 'Separated'

Is Dependent
Report one the following codes:

Dependent: 'y' or 'true'

Independent: 'n' or 'false'

Family Size
The number of members in the student's household, including the student. Generally, this figure should match the number reported for the student in CSAW.

For Dependent Student: Include the student, parents, siblings, and other dependents used in the need analysis calculation. This number must be at least 2.

For Independent Student: Include the student, the student's spouse if applicable, any dependent children, and any other persons used in the need analysis calculation. This number must be at least 1.

Number in College
The number of family members, including the student, expected to be enrolled in an institution at least half-time between July 1, 2020, and June 30, 2021, in programs of study leading to college degrees or certificates. For dependent student filers, this should not include the student's parents unless a professional judgment decision was made to count them. Generally, this figure should match the number reported for this student in CSAW. This number must be at least 1.

[Family Income](#)

The family income used in computing the student's financial need. For most students, the family income will be for the 2018 calendar year as reported on the 2020-21 FAFSA or WASFA. This is a required field if reporting any of the following other items for a student: Expected Family Contribution, Need Amount, or Need Duration.

Only include integers (no decimals) and do not include dollar ($) signs. Include a negative sign (-) for any negative amounts. For example, a negative family income of $9,875 would be reported as '-9875'.

Report the family income levels from your system even if they are higher or lower than the system edit amounts. We prefer that you report the actual amounts and, if an edit occurs, indicate something like "actual income reported on FAFSA (or WASFA)." Reporting of actual income allows for more accurate reporting of average family income levels. Generally, this figure should match the number reported for this student in CSAW.

For Dependent Student*:* Taxable and non-taxable income of parent(s). Do not include the student's income.

For Independent Student*:* Sum of student and spouse taxable and non-taxable income.

[Reporting Items in the Need Equation](#)

Information reported in the four fields that follow may be reported based on the information available at the time of the recipient's first financial aid disbursement during the 2020-21 year. This applies to full year awards made at the beginning of the academic year when students opt not to attend all terms.

- Cost of Attendance
- Expected Family Contribution
- Need Duration
- Need Amount

Many students will receive financial aid throughout the year with no changes made to the institution's record for these fields. However, it is important for the data to be consistent if changes are made in an institution's data record. The following examples may be of assistance:

Example 1: Student enrolled is expected to enroll for a nine-month academic year. Report all four fields on that basis.

Example 2: Student originally was expected to enroll for a nine-month academic year. The student, however, did not return to school after the fall term. In this case, the institution may decide either to:

A. Not make any changes to these four fields. However, report enrollment status and financial aid disbursement amounts accurately for all terms.
    or
B. Adjust all four fields in order to align with the actual term-by-term enrollment status.

Cost of Attendance

The estimated student budget upon which the Need Amount was calculated. Include tuition, fees, books and supplies, and living, personal, and transportation expenses. The Cost of Attendance should be consistent with the number of months reported in the Need Duration.

NOTE: Include the full-assessed tuition amount to calculate and report in the URR the true Cost of Attendance (COA) for recipients of WCG, CBS, and other need-based assistance. The full-assessed tuition amount is what the student is, or would be, assessed before any tuition waiver(s) have been applied. This formula is required for the 2020-21 URR. See the 2020-21 Washington College Grant/College Bound Scholarship program manual, Chapter 2, page 27, Cost of Attendance (COA) and Tuition Waivers.

Expected Family Contribution

The Expected Family Contribution (EFC) usually will be the Federal Methodology (FM) calculation produced by the U.S. Department of Education based on the 2020-21 FAFSA or WASFA (uses a FAFSA-like computation but is not processed through the US Department of Education). If a financial aid administrator has made a professional judgment decision to adjust the FM EFC, they must submit those corrections through either the federal processor or through the WASFA and then report the adjusted EFC amount as calculated on the FAFSA or WASFA. This should be consistent with the number of months reported in the Need Duration. This is a required field if reporting any of the following other items for a student: Family Income, Need Amount, or Need Duration.

NOTE: If an institution also calculates an Institutional Methodology (IM) expected family contribution that differs from the FM EFC, report the FM rather than the IM amount as the EFC.

For Dependent Students: Base the expected family contribution on the information reported by the student and the student's parent(s) on the FAFSA or WASFA.

For Independent Students: Base the expected family contribution on the information reported by the student and the student's spouse, if applicable, on the FAFSA or WASFA.

Need Duration

The number of months for which the Need Amount was calculated and the Cost of Attendance was determined. For example, if a student's need amount and cost of attendance were based on nine months, the figure '9' would be reported. This is a required field if reporting any of the following other items for a student: Family Income, Expected Family Contribution, or Need Amount.

Report the Need Duration as an integer from 1-12.

Need Amount

The amount of need used to determine the student's eligibility. This should equal the Cost of Attendance minus the Expected Family Contribution (EFC). This is a required field if reporting any of the following other items for a student: Family Income, Expected Family Contribution, or Need Duration.

Cost of Attendance
<u>– Expected Family Contribution</u>
= Need Amount

If the above calculation results in a negative number, report the Need Amount as zero ('0'). WSAC will adjust the URR to reflect a zero ('0') for any Need Amount reported as a negative number.

[Reporting Term Enrollment and Financial Aid for Five Terms](#)

Report enrollment and financial aid received on a term-by-term basis. When preparing the CSV file, follow the sample file format, which replaces the word 'Term' with 'Summer 1,' 'Fall,' etc. for all fields for all five terms.

- Summer 1
- Fall
- Winter
- Spring
- Summer 2

For students for whom data is required on the URR, report term enrollment statuses and financial aid received for all five terms. For any terms that students did not enroll, be sure to report the TermEnrollmentStatus as '0' or 'Not enrolled.' For any terms that students did not receive aid, be sure to report '0' for each aid program.

For some institutions, the academic year may cover the July 2020–June 2021 timeframe. For others, it may more closely represent the dates of August 2020–July 2021. In most cases, it will not exceed 12 months. If you are reporting assistance for students who did not submit a FAFSA or WASFA, use the same timeframe for these students as you use for FAFSA or WASFA filers.

NOTE: The URR checks to ensure that a positive enrollment status (any status except for '0' or 'Not enrolled') is reported for each term that aid was reported on a student record, excepting certain work programs (e.g., State and Federal Work Study, and work force training funds, which allow for payment during a non-enrolled term, such as Summer). This edit is overrideable.

Quarter and Semester Term Institutions

Most institutions will use either the Summer 1 term or the Summer 2 term, but not both. For the term that is not used, either '0' or 'Not enrolled' should be input for the term enrollment status.

Quarter institutions will use fall, winter, spring, and appropriate summer terms for the reporting of financial aid recipients.

Semester institutions normally will use fall, spring, and appropriate summer terms for the reporting of financial aid recipients. If the student received disbursement of specific grant, scholarship, or loan assistance for the short period between the fall and spring semester, report as fall, winter, or spring term financial aid based on institution reporting preferences. If there was specific Federal Work Study, State Work Study, or Institutional

Employment awarded for the time between fall and spring terms, you may report it as winter term.

Each institution with a **summer enrollment** period (typically between May and August) should report summer aid disbursements as a "leader" institution or as a "trailer" institution based on federal program rules. Institutions should report financial aid disbursed under "leader" rules as 'Summer 1' assistance. Institutions should report financial aid disbursed under "trailer" rules as 'Summer 2' assistance. If an institution has more than one summer term during the same summer, combine and report the financial aid and term enrollment status as a single summer term.

> *Example 1:* A student at a "trailer" institution received financial aid for two short summer sessions in 2021, based on the 2020-21 FAFSA or WASFA. The student received financial aid for 6 credits the first summer session (mid-May to late June) and received financial aid for another 6 credits the second summer session (early July to mid-August). Report all aid as 'Summer 2' with the student's enrollment status as full-time. 'Summer 1' enrollment and all financial aid fields will be '0'.

> *Example 2:* A student at a "header" institution received financial aid for the summer 2020 term based on the 2020-21 FAFSA or WASFA. At the time of the URR submission, the student also received financial aid for the summer 2021 term (based on a 2021-22 FAFSA or WASFA). Report aid received during the summer of 2020 as 'Summer 1'. Report 'Summer 2' enrollment status and corresponding financial aid fields as '0'. (Note: In this case, report the 2021 summer enrollment and aid received on the 2021-22 URR.)

Combination of leader and trailer awards: If your institution awarded some programs under leader rules and other programs under trailer rules, report leader awards in Summer 1 and report trailer awards in Summer 2.

Continuous Enrollment Credit Hour Institutions and Clock-Hour Institutions

Some clock-hour institutions do not divide their school year into academic terms. These institutions should report each student's enrollment status and financial aid received in each of the five time periods. Each term should represent approximately 10 weeks. Base the reporting periods on when the majority of enrollment occurred.

The terms and dates reported should be consistent with the information reported for WCG in the CSAW portal application for the 2020-21 year.

Term Date Ranges for Clock-Hour Institutions
These reflect the same date ranges that appeared in the 2020-21 WCB/CBS manual.

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

Term Enrollment Status

Report enrollment based upon the student's status or scheduled clock hours at the time of financial aid disbursement or a fixed date such as the tenth day of enrollment.

Undergraduate Enrollment Status: Use the following codes for reporting enrollment status by number of undergraduate credits or scheduled clock hours per term.

Undergraduate Enrollment Status	Credits	Scheduled Clock Hours	URR Codes
Not Enrolled	n/a	n/a	'0' or 'Not enrolled'
Full-Time	12 or more	300 or more	'1' or 'Full time'
Half-Time	6–8	150–224	'2' or 'Half time'
Three-Quarter Time	9–11	225–299	'3' or '3/4 time'
Less Than Half-Time	Less than 6	Less than 150	'5' or '< Half time'

Graduate Student Enrollment Status: Use the following table for reporting enrollment status based on the institution's definition of enrollment status for graduate students.

Graduate Enrollment Status	URR Codes
Not Enrolled	'0' or 'Not enrolled'
Full-Time	'1' or 'Full time'
Half-Time	'2' or 'Half time'
Three-Quarter Time	'3' or '3/4 time'
Less Than Half-Time	'5' or '< Half time'

Reporting of Financial Aid Received

Use whole dollar amounts—no decimals and no dollar signs ($)—when reporting financial aid disbursements or funds received.

Do not report aid from one program in multiple URR fields. If there are two or more possible fields to report in, choose one or contact unitrecord@wsac.wa.gov for assistance.

For each aid program listed below, report for the five terms. Indicate '0' for all terms that a student did not receive specified aid. Do not leave any fields blank.

Consistency with other WSAC Reporting: WSAC will compare information provided in the URR for programs such as WCG, CBS, and Passport to College on a recipient basis with information submitted in CSAW and other WSAC reports.

Generally, the total funds reported for each recipient should be the same for all of the reports. For any difference of greater than $10 per student, institutions will need to either reconcile the reports or provide an edit override explanation.

Federal Aid Programs

Federal Pell Grant

The amount of Federal Pell Grant funds received by the student.

Federal SEOG

The total amount of Federal SEOG funds received by the student. Include federal and institutional match awards.

Federal TEACH Grant

The amount of Federal TEACH Grant funds received by the student.

Federal Nursing Scholarships

The amount of federal scholarships and grants received by the student for nursing and other health professional training.

Federal Work Study

The student's gross Federal Work Study compensation. Include federal, employer, and institutional shares, and include all employers, both on- and off–campus earnings.

For institutions reporting fall and spring semesters, include any earnings received between the terms as either fall or spring term. Do not report this aid type as winter term aid unless there was a specific award made for the winter term.

There are two options for reporting work study earnings:

Actual Term Earnings: Institutions may report actual gross term earnings based upon monthly cutoff dates or institutional payroll dates. For example, a semester institution may report all September–December earnings as fall term aid and January–May earnings as spring term aid (with '0' reported for winter aid). Quarter institutions may report September–December earnings for fall term, January–March earnings for winter term, and April–June earnings for spring term.

Average Term Earnings: Institutions may report average gross term earnings over the academic year for all terms for which the student had an Enrollment Status of half-time or higher. For example, if a student received $3,261 in earnings at a semester institution over the course of an academic year, you may report $1,631 as fall term earnings and $1,630 as spring term earnings.

Federal Nursing Health Loans

The amount of any Federal Nursing Student Loan or federal health professions student loan funds received by the student.

Federal Direct Subsidized Loans

The total gross amount borrowed by the student, including fees, from the Federal Direct Subsidized Loan program. Note: This amount may not be the amount requested on the application form. Another name for this program is the Federal Stafford Subsidized Loan.

Federal Direct Unsubsidized Loans

The total gross amount borrowed by the student, including fees, from the Federal Direct Unsubsidized Loan program. Note: This amount may not be the amount requested on the application form. An alternate name for this program is the Federal Stafford Unsubsidized Loan.

Federal Parent PLUS Loans

The total gross amount borrowed by the student's parent(s), including fees, from the Federal Parent PLUS Loan program. Note: This amount may not be the amount requested on the application form.

Federal Grad PLUS Loans

The total gross amount borrowed by the student, including fees, from the Federal Grad PLUS Loan program. Note: This amount may not be the amount requested on the application form.

State Aid Programs

WA College Grant (WCG)

The amount of WCG funds received by the student. The amount reported normally should be the same amount reported in CSAW.

WCG Apprenticeship

There should be no amount reported in this category for 2020-21. Funds received by the student for WCG Apprenticeship should be reported in WA College Grant field for 2020-21.

College Bound Scholarship (CBS)

The amount of College Bound Scholarship funds received by the student. The amount reported normally should be the same amount reported in CSAW.

Passport to College Scholarship

The amount of Passport to College Scholarship funds received by the student. In the unusual circumstance that an incentive grant was used to enhance a student's financial aid award, the incentive grant portion must be reported separately as financial aid received by the student in the Passport to College Incentive Grant field of the URR (see below).

For example, if the student received a $5,000 Passport to College Scholarship and a $500 incentive grant payment, the institution should report on the URR that the student received $5,000 in the Passport to College Scholarship field(s) and separately report $500 in the Passport to College Incentive Grant field(s). Do not report these two award types as a combined program amount. The amount reported as Passport to College Scholarship normally should be the same amount reported in CSAW for PTC.

Passport to College Incentive Grant

The amount of Passport to College Incentive Grant funds disbursed to the institution that is received by the student as a direct financial aid.

For example, if the student received a $5,000 Passport to College Scholarship and a $500 incentive grant payment, the institution should report the $500 incentive grant portion in the Passport to College Incentive Grant field(s).

National Guard Grant

The amount of National Guard Grant funds received by the student. This is a new program in 2020-21. The National Guard Grant awards may trigger an overrideable edit as WSAC implements the payment system in the Portal. The award match may not be fully in place at time of URR submissions.

Alternative Routes for Teaching Certification

Beginning 2020-21, report the amount of state funded Alternative Routes received by the student here. There is a potential for loan repayment if required conditions are unmet. Formerly reported as TeacherConditionalScholarshipPrograms.

Paraeducator (also known as Pipeline for Paraeducators Conditional Scholarship)

Beginning 2020-21, report the amount of state funds received by the student for the Pipeline for Paraeducators program here. There is a potential for loan repayment if required conditions are unmet. Formerly reported as TeacherConditionalScholarshipPrograms.

Teacher Shortage Conditional Scholarship

Beginning 2020-21, report the amount of Teacher Shortage Conditional Scholarship funds received by the student. There is a potential for loan repayment if required conditions are unmet. Formerly reported as TeacherConditionalScholarshipPrograms.

Teacher Grant Programs

The amount of state-funded teacher grants received by the student. Grants do not include terms of potential for repayment for receipt of funds. Examples include the Student Teaching Grant and the Teacher Endorsement and Certification Help program (Teacher Endorsement, or state TEACH program; this is not the federal TEACH Grant).

WSOS BA Scholarship (formerly Opportunity Scholarship)

The amount of WSOS BA Scholarship funds received by the student. This program also used to be known as the Washington State Opportunity Scholarship. Washington STEM administers the program.

WSOS Career Technical Scholarship

The amount of WSOS Career and Technical Scholarship funds received by the student, including awards for the Rural Jobs Initiative (RJI), a new subprogram within the Career

and Technical Scholarship program beginning in 2020-21. Washington STEM administers the program.

SBCTC Opportunity Grant

The amount of State Board for Community and Technical Colleges (SBCTC) Opportunity Grant funds received by the student. Note: This grant is available only to students attending community and technical colleges and select private career institutions.

Other State Funded Gift Assistance

The amount of other state scholarships and grants received by the student (e.g., Global Opportunity Grants [applies to UW only], Early Achievers Opportunity Grants, Washington Scholars, and the American Indian Endowed Scholarship), that are not included in another state aid category.

Do not report family-purchased Guaranteed Education Tuition (GET) fund distributions in the Unit Record Report.

On-Campus State Work Study

The student's gross on-campus State Work Study compensation. Include state and institutional share.

For institutions reporting fall and spring semesters, include any earnings received between the terms as either fall or spring term. Do not report this aid type as winter term aid unless there was a specific award made for the winter term.

There are two options for reporting work study earnings:

> *Actual Term Earnings:* Institutions may report actual gross term earnings based upon monthly cutoff dates or institutional payroll dates. For example, a semester institution may report all September–December earnings as fall term aid and January–May earnings as spring term aid (with '0' reported for winter aid). Quarter institutions may report September–December earnings for fall term, January–March earnings for winter term, and April–June earnings for spring term.

> *Average Term Earnings:* Institutions may report average gross term earnings over the academic year for all terms for which the student had an Enrollment Status of half-time or higher. For example, if a student received $3,261 in earnings at a semester institution over the course of an academic year, that could be reported as $1,631 fall term earnings and $1,630 spring term earnings.

Off-Campus State Work Study

The student's gross off-campus State Work Study compensation. Include state and off-campus employer share.

For institutions reporting fall and spring semesters, include any earnings received between the terms as either fall or spring term. Do not report this aid type as winter term aid unless there was a specific award made for the winter term.

NOTE: The same two options for reporting earnings are available (see On-Campus section above).

If the institution acts as the employer of record and the student works off campus, it is preferable to report earnings as off-campus State Work Study. If accounting constraints do not permit recording of earnings as off-campus, report the earnings as on-campus State Work Study.

WorkForce Training Funds

The amount of Worker Retraining Program funds received by the student. Also include Work-Based Learning Tuition Assistance Funds and Basic Food Employment & Training (BFE&T) dollars in this category.

Institutional Aid Programs

Need-Based Institutional Gift Aid

The amount of all institutional grants, scholarships, and/or waivers awarded solely or partially based on need.

Report institutional scholarships, grants, and waivers awarded only based on merit or other non-need-based criteria as Non-Need Based Institutional Gift Aid.

- For WCG and CBS recipients, report all need-based tuition waivers in this category of the URR. The institution must ensure that student COAs reported include the true cost of tuition (that is, the full assessed tuition amount before the waiver is applied). This data is required for the 2020-21 URR.

- For recipients of other need-based aid who did not receive WCG or CBS, report any need-based tuition waiver(s) in this category of the URR and, whenever possible, the full-assessed tuition amount is to be included in the COA.

Non-Need Based Institutional Gift Aid

The amount of institutional scholarships, grants, and/or waivers received by the student not based on a review of the 2020-21 FAFSA, WASFA, or other need determination.

Report institutional grants, scholarships, and waivers awarded solely or partially based on need as Need-Based Institutional Gift Aid.

- For WCG and CBS recipients, report all non-need-based tuition waivers in this category of the URR. The institution must ensure that the student's reported COA includes the true cost of tuition (that is, the full assessed tuition amount before the waiver is applied). This data is required for the 2020-21 URR.

- For recipients of other need-based aid who did not receive WCG or CBS, report any non-need-based tuition waiver(s) in this category and, whenever possible, the full-assessed tuition amount is to be included in the COA.

- Do not report in the URR a student who received non-need-based tuition waiver(s) but did not receive any need-based financial assistance.

Institutional Employment

The student's gross non-work study institutional employment earnings (on- or off-campus) if the employment was included as part of the financial aid package.

Also, include WorkFirst work study funds and any amounts from the institutional aid fund distributed as institutional employment.

Do not include earnings reported as Federal Work Study or State Work Study.

For institutions reporting fall and spring semesters, include any earnings between the terms as either fall or spring term. Do not report this aid type as winter term aid unless there was a specific award made for the winter term.

Institutional Loans

The amount of all institutional loans disbursed to the student. Do not include "short term" or "emergency" loans generally repaid within a few months. Report only those students who have also received other need-based assistance.

Other Financial Aid Programs

For any additional conditional, private, or other loans not reported elsewhere, report the loan amount received by the student in one of the next three categories. Choose the category that fits best.

Conditional Loans

The amount of scholarships, grants, and loans received by the student and not reported elsewhere that have the potential for loan repayment if required conditions are unmet.

Private Loans

The amount of PREP loans, community foundation loans, and all other private loans received by the student and not reported elsewhere.

Other Loans

The amount of Canadian, Micronesian, Alaska Student Loans, and other agency or government loans received by the student and not reported elsewhere, such as the Aerospace Loan Program (ALP).

Outside Scholarships

The amount of known outside or private scholarship funds received by the student.

Include National Merit, employer-funded tuition assistance, company, service club, and any other private scholarships or grants not reported elsewhere.

Scholarships funded by the institution's foundation or endowment should be reported as either Need-Based Institutional Gift Aid or Non-Need Based Institutional Gift Aid.

VA Benefit

Beginning 2020-21, report the amount of VA Benefits received by the student in this field; for example, Chapter 31 and 33 Veterans Benefits, or other Veterans Benefits. This formerly was reported in the OtherAgencyAssistance category.

Other Agency Assistance

The amount of scholarships and grants received by the student from other agencies or government sources not reported elsewhere.

Include Department of Labor and Industries, Services for the Blind, Workforce Investment Act, Vocational Rehabilitation, AmeriCorps Education Award, Bureau of Indian Affairs (BIA), Reserve Officers' Training Corps (ROTC), federal scholarships for TRIO students, federal Education and Training Vouchers (ETV), federal Child Care Access Means Parents In School (CCAMPIS) funds awarded to student, and other agency assistance.

CHAPTER 3 – REPORTING APPLICATION USER'S GUIDE

This section provides instructions for the Portal-based URR application used to create and submit your institution's URR to WSAC.

This section starts with an overview of the application and continues with step by step instructions.

Accessing the Portal Application

The URR application is located on WSAC's Portal website: https://portal.wsac.wa.gov/.

Enter your email address and password in the top right corner to log in or click "Unit Record Report" under the Financial Aid Administrators heading and log in when prompted at the secondary login screen. If you do not have access to the Portal, contact WSAC staff at unitrecord@wsac.wa.gov.

Under the "Programs" menu across the top, click on "Unit Record."

NOTE: Your menu may have different menu options depending on the programs you have permission to access. If "Unit Record" does not show in your menu, contact WSAC staff at unitrecord@wsac.wa.gov.

You will encounter the following "Welcome" screen upon your first URR login for the year. If the URR file was uploaded during an earlier Portal session, you will be taken directly to the appropriate status screen upon login instead of the "Welcome" screen; that is, "Ready to Begin," "In Progress," or "Submitted."

Uploading Data from a File

From the "Welcome" screen, click on the "Next: Proceed to Upload" button.

Click the "browse" button to find the file on your PC that you want to upload. Be sure to select a file saved in CSV format; then, click the "upload" button. **CAUTION:** Upload of a new file will delete all prior data and any overridden errors from the system.

The upload process may take a while, depending on file size. The "Processing" progress bar shows the ratio of records processed to the total records contained in the file download (shown below) and can be used to determine how much of the file upload has been completed.
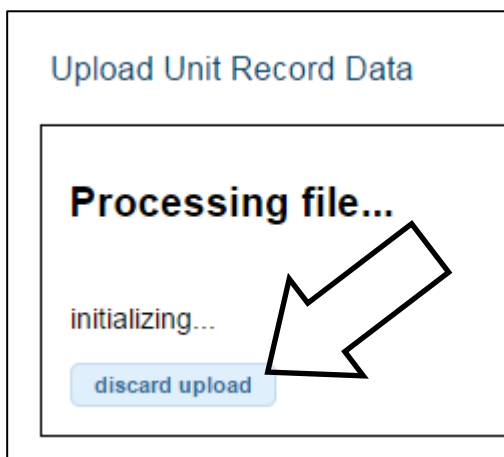
Deleting a File Upload in Process

The "Discard Upload" button appears immediately upon initiating a URR file upload. Clicking the "Discard Upload" button interrupts and deletes the file upload mid-process, allowing you to select and upload a different file. This functionality permits users to cut short any potentially long wait times if you discover a critical error(s) in a high-volume file during upload. The "Discard File" button also remains available after upload has completed.

If a fully uploaded file contains errors, you will see a message like the one below, indicating that file correction is necessary and then resubmitted. From here, you can either click on

the "discard file" button to return to the upload page or click on the "download errors to csv" button to see a complete list of errors in the file.

Editing Student Records

If the file uploads successfully, you will see the "File Upload Complete!" message. Verify the number of student records uploaded and Year In School distribution with your institutional records. If the numbers are correct, click the "Proceed to Edits" button. To start over, click the "Discard Upload" button.

The Edit process may take a while. Monitor the progress bar at the top, which will disappear when the record review process has completed. Click "refresh" to display edits.

On the Unit Record Edits page(s), the Overrideable column shows the edit type. "Overrideable" means you may correct the edit or enter an override reason on the student record. You must correct any non-overrideable edits (red hexagon) in the student record before you can move forward.

To override or correct an edit, click the SSN number to open the student record. Error messages are displayed at the top of the screen below the student's identifying information. To edit the record, click into the appropriate field, enter the correction, and then click "Save."

To override, click the "Override" button. Briefly explain the reason for the difference in the pop-up window and click "Save".
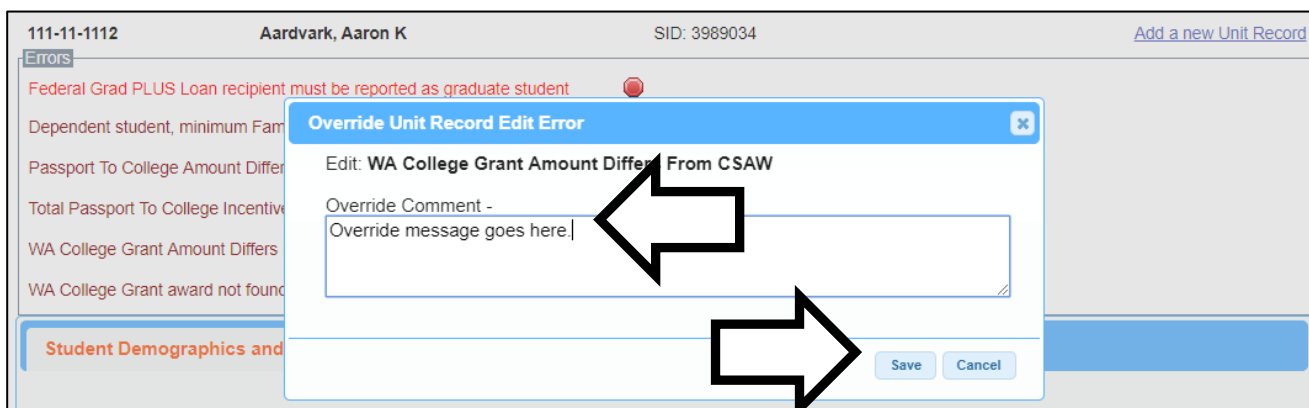

Overridden edit messages will change from red to gray in the errors list. To review any override comments you have made, hover the mouse over the blue information icon. The override comment will appear in a yellow pop-up box.
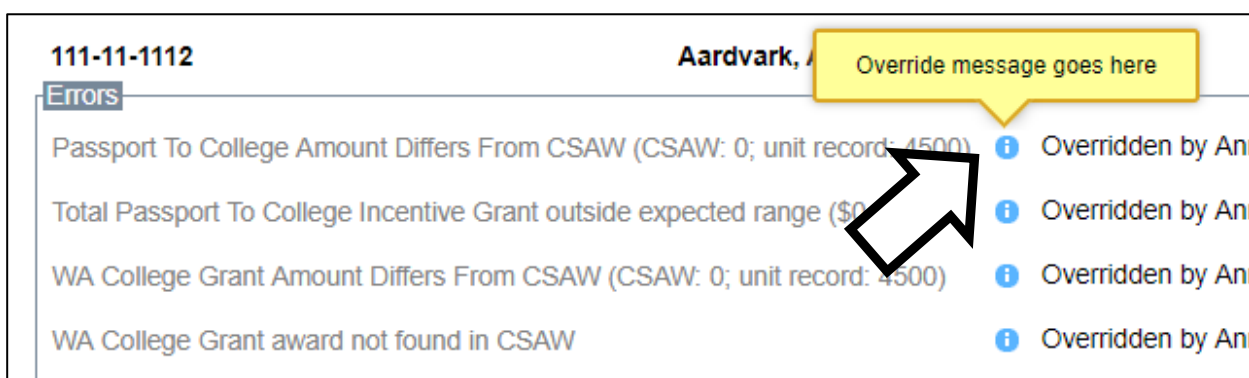
Address all errors for each student record. If you correct all edits in the student record instead of entering overrides, a green "No Errors" message will appear at the top of the screen after the errors are corrected.
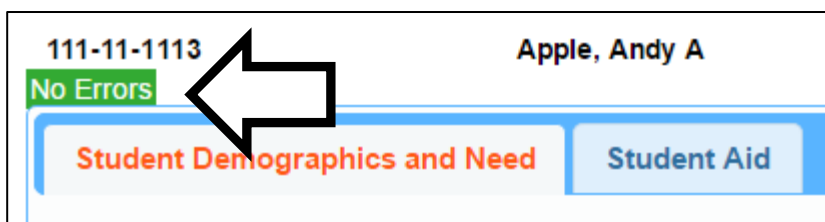
The gray "Errors" message will remain at the top of the screen if the student record has overridden edits, but there will no longer be any red edit messages.
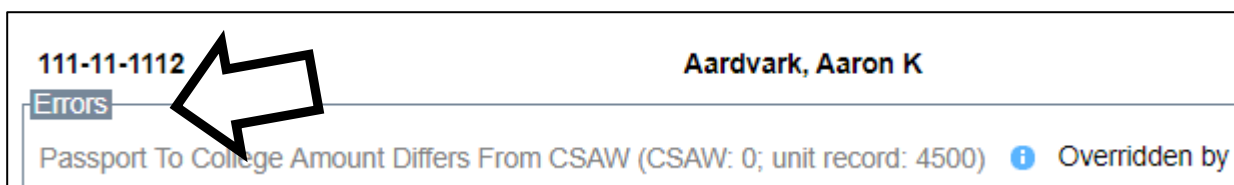
Checking for Missing Data Previously Reported in WSAC Records

After you have corrected or overridden all errors identified on the Unit Record Edits page, press the "Click to Continue" button which will take you to the WCG/CBS/PTC Difference Reports.

Review the differences reports to identify data omitted from the URR but previously entered into CSAW or other Portal records for Washington College Grant (WCG), College Bound Scholarship (CBS), and Passport to College (PTC) students that may need editing. A "Y" in the Override Requested column flags differences already addressed through an override request.

Differences not yet addressed show a blank in the "Override Requested" column. Click the "Download differences to csv" button to download a separate file to review unaddressed data edits, and identify missing student records that require addition to the URR.

To add missing WCG/CBS/PTC data for student records that already exist in your URR upload, click "Search" in the secondary menu bar to locate and open the student record for edit.

If an individual student record is missing from the URR entirely, see the section, "Manually Adding Student Records," for instructions.

Manually Adding Student Records

To add student records manually, click the "Add a new unit record to the report" button at the top of the Unit Record Edits page.

Enter the student's data into both tabs of the blank form. Complete all required fields and any other applicable fields. Click the "Save" button at the bottom to save the changes. Refer to the Editing Student Records section above if any flagged errors appear.

New Unit Record

Student Demographics and Need	Student Aid

		Summer 1	Fall	Winter	Spring	Summer 2	Total
	Enrollment Status	Not enrolled ▾	Not enrolled ▾	Not enrolled ▾	Not enrolled ▾	Not enrolled ▾	
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	WA College Grant	0	0	0	0	0	0
	WCG Apprenticeship	0	0	0	0	0	0
	College Bound Scholarship	0	0	0	0	0	0
	Passport to College Scholarship	0	0	0	0	0	0
	Passport to College Incentive Grant	0	0	0	0	0	0
	National Guard Grant	0	0	0	0	0	0
	Alternative Routes	0	0	0	0	0	0
	Paraeducator	0	0	0	0	0	0
	Teacher Shortage Conditional Scholarship	0	0	0	0	0	0
	Teacher Grant Programs	0	0	0	0	0	0
	WSOS BA Scholarship	0	0	0	0	0	0
	WSOS Career Tech	0	0	0	0	0	0
	SBCTC Opportunity Grant	0	0	0	0	0	0
	Other State Funded Gift Assistance	0	0	0	0	0	0
	On Campus State Work Study	0	0	0	0	0	0
	Off Campus State Work Study	0	0	0	0	0	0
	WorkForce Training Funds	0	0	0	0	0	0
Institution	Need Based Institutional Gift Aid	0	0	0	0	0	0
	Non-Need Based Institutional Gift Aid	0	0	0	0	0	0
	Institutional Employment	0	0	0	0	0	0
	Institutional Loans	0	0	0	0	0	0
Other	Conditional Loans	0	0	0	0	0	0
	Private Loans	0	0	0	0	0	0
	Other Loans	0	0	0	0	0	0
	Outside Scholarships	0	0	0	0	0	0
	VA Benefit	0	0	0	0	0	0
	Other Agency Assistance	0	0	0	0	0	0
	Total	0	0	0	0	0	0

<<Prev	Next>>	✓ Save	Return to the Edit List

Submitting the Unit Record Report

Review your Summary Reports after you have addressed all edits and differences, and before submitting the URR.

When you are ready to submit your URR, select the "Click to Continue" button on the "Edits" page.

You will have one more opportunity here to review any differences between your URR data and Portal records for Washington College Grant, College Bound Scholarship, and Passport to College. If you find additional differences, you can edit the records by clicking "Return to the Edit List." If you submit the URR with significant differences, WSAC staff will contact you to resolve any questions about those differences before WSAC finalizes the report.

SSN differences originating in the URR may be corrected by editing the URR student record directly. However, any SSN mismatch that originated in the CSAW record from the institution side of the URR Portal requires WSAC assistance to make corrections. Click the "Send an Email" button and create a secure email with the revision details to the Unit Record Report team, who will initiate the SSN correction for you from the WSAC side of the Portal.

After you have addressed all edits and differences on these tabs, press the "Click to Continue" button.

The next screen displays a copy of the pre-submission, preliminary Program Totals Report. We recommend that you review the current-year data to determine if any programs are missing or if unusual patterns are present in your totals comparisons. Please contact WSAC staff to discuss available options if that is the case. If everything appears reasonable, press the "Click to Continue" button.

| Submit Unit Record Data | 2020-2021 | | (Name of Institution here) | | | | | In Progress | | | |

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

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

Uploaded by Ann Voyles on 6/16/2021

Create a PDF of this page for your records

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

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

After reviewing the 2020-21 information in the "Program Totals Report," you also have an opportunity to review the "Demographic Report" before submitting your report. If all data appears reasonable, click "Submit Your Unit Record Report."

| 2020-2021 | | (Name of Institution here) | | | In Progress |

After all edits and differences have been addressed, and your Program Totals Report appears reasonable, click submit: ⊙ **Submit Your Unit Record Report**

Return to the Edit List

You may download the URR summary analysis reports at any time. The Profile Reports will be produced in January. WSAC will notify institutio___ ___ Profile Reports are available for download.

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

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

Demographic Distribution Reports — Shows student demographic changes for all reported students over the last four years.

WCG, College Bound & Passport Differences — Show differences between Unit Record data and CSAW.

Profile Reports - These reports allow your institution to compare the assistance your students have received from these programs to all institutions in Washington state and also to all institutions in your institutions sector.
The comparison reports for this year will be available in January 2022. To view previous year comparison reports, select a previous year from the options shown above.

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

A pop-up window will appear at the top of your browser to remind you that additional changes to the data cannot take place without contacting the WSAC Unit Record Report team after you submit the URR. If ready to continue, click "OK."

portal.wsac.wa.gov says

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

OK   Cancel

After submitting URR data successfully, you will see the following message, and WSAC staff will receive a corresponding email of the URR submission. Contact the WSAC Unit Record Report team at unitrecord@wsac.wa.gov if you identify any additional changes necessary to the data after submission.

Unit Record Report -- Submitted   2020-2021   **(Name of Institution here)**   **Submitted**

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

Uploaded by
Submitted by

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

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

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

Demographic Distribution Reports — Shows student demographic changes for all reported students over the last four years.

WCG, College Bound & Passport Differences — Show differences between Unit Record data and CSAW.

Profile Reports - These reports allow your institution to compare the assistance your students have received from these programs to all institutions in Washington state and also to all institutions in your institutions sector. The comparison reports for this year will be available in January 2022. To view previous year comparison reports, select a previous year from the options shown above.

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

Reports Available After Submission

We recommend that you retain copies of the Program Totals Report and Demographic Distribution Reports after submitting your final URR. You may also review previous-year Profile Reports at this time.

PLEASE NOTE: WSAC will remove any non-essential, non-need-based data from your institution's records after WSAC has finalized all URRs. This means that, prior to final closure of all URR submissions for the year, your preliminary Institutional Totals Report column for 2020-21 may include some non-need-based aid that WSAC will remove later. Until WSAC removes all non-essential non-need-based aid from the 2020-21 column, your Program Totals Report could reflect a greater percentage change between 2019-20 and 2020-21 than will appear after WSAC releases the final reports for 2020-21 in January 2022.

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

Program Totals Report	Details the total number of all reported students and aid amounts for the last four years.
Demographic Distribution Reports	Shows student demographic changes for all reported students over the last four years.
WCG, College Bound & Passport Differences	Show differences between Unit Record data and CSAW.

Profile Reports - These reports allow your institution to compare the assistance your students have received from these programs to all institutions in Washington state and also to all institutions in your institutions sector. The comparison reports for this year will be available in January 2022. To view previous year comparison reports, select a previous year from the options shown above.

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

Updated Profile Reports Available in January 2022

Updated Profile Reports that include 2020-21 comparison information of the institution's data to all institutions in the same sector, as well as to all institutions in the state, will be available in January 2022. Institutions will receive an email announcement when those reports are available.

Prior to January 2022, Profile Reports are available with comparison information for several previous years. You may download and print those reports as a PDF at any time. To view these Profile Reports, click the drop-down box and select the appropriate academic year as shown in the screenshot example:

APPENDIX A: NEED-BASED AND NON-NEED BASED PROGRAM RECIPIENTS TO REPORT

NOTE: Aid types below are listed in the same order as the File Format shown in Appendix B.

Are aid types need-based or not?	Need-Based (FAFSA or WASFA data required)	Need-Based (FAFSA or WASFA data optional)	Non-Need Based Federal Loans	Non-Need Based Other Programs
What recipients should be reported?	Report all recipients	Report all recipients	Report all recipients	Only report recipients who are also need-based recipients
Should FAFSA or WASFA data be submitted?	Yes	Yes, if FAFSA or WASFA data is available	No, unless need-based aid is also reported Yes, FAFSA data required	Yes, if FAFSA or WASFA data is available
Name of Program or Aid Type				
Federal Pell Grant	X			
Federal SEOG	X			
Federal TEACH Grant		X		
Federal Nursing Scholarships		X		
Federal Work Study	X			
Federal Nursing Health Loans		X		
Federal Direct Subsidized Loans	X			
Federal Direct Unsubsidized Loans			X	
Federal Parent PLUS Loans			X	
Federal Grad PLUS Loans			X	
Washington College Grant	X			
Washington College Grant Apprenticeship	X			
College Bound Scholarship	X			
Passport to College Scholarship	X			
Passport to College Incentive Grant	X			
National Guard Grant		X		
Alternative Routes		X		
Paraeducators (Pipeline for)		X		

Are aid types need-based or not?	Need-Based (FAFSA or WASFA data required)	Need-Based (FAFSA or WASFA data optional)	Non-Need Based Federal Loans	Non-Need Based Other Programs
What students should be reported?	Report all recipients	Report all recipients	Report all recipients	Only report recipients who are also need-based recipients
Should FAFSA or WASFA data be submitted?	Yes	Yes, if FAFSA or WASFA data is available	No, unless need-based aid is also reported Yes, FAFSA data required	Yes, if FAFSA or WASFA data is available
Name of Program or Aid Type				
Teacher Shortage Conditional Scholarship		X		
Teacher Grant Programs	X			
WSOS BA Scholarship		X		
WSOS Career Tech Scholarship		X		
SBCTC Opportunity Grant		X		
Other State Funded Gift Assistance		X		
On Campus State Work Study	X			
Off Campus State Work Study	X			
WorkForce Training Funds		X		
Need Based Institutional Gift Aid		X		
Non-Need Based Institutional Gift Aid				X
Institutional Employment		X		
Institutional Loans				X
Conditional Loans – Need Based	X			
Conditional Loans – Non-Need Based				X
Private Loans				X
Other Loans				X
Outside Scholarships				X
VA Benefit				X
Other Agency Assistance				X

APPENDIX B: RECORD LAYOUT

The following shows field header names, valid inputs, remarks, and changes. A CSV file layout with headers is available on the WSAC website at: www.wsac.wa.gov/unit-record. Field names are hyperlinked to the corresponding field names in Chapter 2 (Data Definitions).

Field/Column Header Name	Valid Inputs	Remarks	Changes?
SSN	Numbers, with or without hyphens, no spaces	Required for all recipients. Nine-digit SSN. Include leading zeros, if necessary, to fill all nine digits. **For students reported in CSAW:** Report the same number used in CSAW. **For students not reported in CSAW:** Report the same number used in your institutional reporting.	No
InstitutionStudentID	Any characters (up to 50)	Unique identifier for this student (SID) at your school. Public baccalaureate institutions should use the nine-character PCHEES Student ID as the first nine characters. CTCs should use the nine-character, college-assigned SID. Optional for private institutions. Privates may leave this field blank.	No
LastName	Any characters (up to 100)	Required for all recipients. If a student only has a first name, report that name as first name and last name.	No
FirstName	Any characters (up to 50)	Required for all recipients. If a student only has a last name, report that name as first name and last name.	No
MiddleName	Any characters (up to 50)	Optional, but provide if available – even if only the initial.	No

Field/Column Header Name	Valid Inputs	Remarks	Changes?
DateOfBirth	Most standard US database date-only outputs are supported e.g.: • 12/1/1987 • Dec 10 1990 • 12 Aug 1994 • 'April 1, 1992' • '1 May, 1990'	Required field if reporting FAFSA-based or WASFA aid types; otherwise optional and may remain blank. Standard US dates. Two-digit years accepted, but four-digit years are preferred. If commas are included in the dates, enclose the data in quotes.	No
Gender	'1' or 'Male' '2' or 'Female' '3' or 'Unknown' '4' or 'X/Non-Binary'	Required for all recipients.	Yes
IsStateResident	'y' or 'true' 'n' or 'false'	Required for all recipients.	No
YearInSchool	'1' or 'Freshman/1st Year' '2' or 'Sophomore/ 2nd Year' '3' or 'Junior/3rd Year' 4' or 'Senior/4th Year' '5' or Unclassified/5th Year' '6' or 'Graduate' '7' or 'Professional' '8' or 'Other'	Required for all recipients. Report the status as of the beginning of the term of the recipient's last financial aid disbursement for the 2020-21 year.	No
IsOfHispanicOrigin	'y' or 'true' 'n' or 'false' blank if not reported	Report if available. Leave blank only if information is not available. Blanks counted as 'n' or 'false.'	No
IsRaceAmericanIndianAlaskaNative	'y' or 'true' 'n' or 'false' blank if not reported	Report if available. Leave blank only if information is not available. Blanks counted as 'n' or 'false.' May report 'y' or 'true' in one or more race category.	No
IsRaceAsian	'y' or 'true' 'n' or 'false' blank if not reported	Report if available. Leave blank only if information is not available. Blanks counted as 'n' or 'false.' May report 'y' or 'true' in one or more race category.	No

Field/Column Header Name	Valid Inputs	Remarks	Changes?
IsRaceBlackAfricanAmerican	'y' or 'true' 'n' or 'false' blank if not reported	Report if available. Leave blank only if information is not available. Blanks counted as 'n' or 'false.' May report 'y' or 'true' in one or more race category.	No
IsRaceNativeHawaiianPacificIslander	'y' or 'true' 'n' or 'false' blank if not reported	Report if available. Leave blank only if information is not available. Blanks counted as 'n' or 'false.' May report 'y' or 'true' in one or more race category.	No
IsRaceWhite	'y' or 'true' 'n' or 'false' blank if not reported	Report if available. Leave blank only if information is not available. Blanks counted as 'n' or 'false.' May report 'y' or 'true' in one or more race category.	No
IsRaceOther	'y' or 'true' 'n' or 'false' blank if not reported	Report if available. Leave blank only if information is not available. Blanks counted as 'n' or 'false.' May report 'y' or 'true' in one or more race category.	No
ISIRWASFATransNumber	Integer 1 to 100 blank if no ISIR or WASFA	Required for all recipients with a FAFSA or WASFA on file. Report transaction number used to award aid. Leave blank if no FAFSA or WASFA data available	No
RejectedISIRWASFA	'y' or 'true' 'n' or 'false'	Required for all records. Use 'y' or 'true' if student did not file FAFSA or WASFA, or has only an invalid, rejected ISIR or WASFA. A blank will trigger an upload fail.	Yes
MaritalStatus	'1' or 'Unmarried' '2' or 'Married' '3' or 'Separated'	Required for all need-based aid recipients with a FAFSA or WASFA on file. May be blank if FAFSA or WASFA data unavailable.	No

Field/Column Header Name	Valid Inputs	Remarks	Changes?
IsDependent	'y' or 'true' 'n' or 'false'	Required for all need-based aid recipients with a FAFSA or WASFA on file. May be blank if FAFSA or WASFA data unavailable.	No
FamilySize	Integer > 0 1 to 20	Required for all need-based aid recipients with a FAFSA or WASFA on file. May be blank if FAFSA or WASFA data unavailable. Matched to CSAW data.	No
NumberInCollege	Integer > 0 1 to 20	Required for all need-based aid recipients with a FAFSA or WASFA on file. May be blank if FAFSA or WASFA data unavailable. Matched to CSAW data.	No
FamilyIncome	Integer between -300000 and 600000	Required for all need-based aid recipients with a FAFSA or WASFA on file. Leave blank if FAFSA or WASFA data not available. Matched to CSAW data.	No
CostOfAttendance	Integer 0 to 250000	Required for all need-based aid recipients with a FAFSA or WASFA on file. May be blank if FAFSA or WASFA data not available. Must use full assessed tuition amount in COA calculation for WCG and CBS recipients, and when possible for other need-based aid recipients	No
ExpectedFamilyContribution	Integer 0 to 250000	Required for all need-based aid recipients with a FAFSA or WASFA on file. Leave blank if FAFSA or WASFA data is not available. Report FM only.	No

Field/Column Header Name	Valid Inputs	Remarks	Changes?
NeedDuration	Integer 1 to 12	Number of months. Required for all need-based aid recipients with a FAFSA or WASFA on file. Leave blank if FAFSA or WASFA data not available.	No
NeedAmount	Non-negative Integer 0 to 250000	Required for all need-based aid recipients with a FAFSA or WASFA on file. Leave blank if FAFSA or WASFA data not available.	No

Enrollment Status and Payments by Term Section

The following set of fields appears five (5) times each in the sample CSV File with 'TERM' in the column header name being replaced in turn by 'Summer1', 'Fall', 'Winter', 'Spring', and 'Summer2'. For example, TERMEnrollmentStatus becomes FallEnrollmentStatus for the Fall Enrollment. All of these fields are required for each student reported.

Field/Column Header Name	Valid Inputs	Remarks	Changes?
*TERM*EnrollmentStatus	'0' or 'Not enrolled' '1' or 'Full time' '2' or 'Half time' '3' or '3/4 time' '5' or '< Half Time'	Required for all recipients for each of the five terms. If the institution does not have that term (e.g., winter for semester institutions), report as '0'. Same reporting as for CSAW.	No
*TERM*FederalPellGrant	Non-negative Integer 0 to 9518	Need-based (FAFSA data required). Report all recipients.	Yes
*TERM*FederalSEOG	Non-negative Integer 0 to 6000	Need-based (FAFSA data required). Report all recipients.	No
*TERM*FederalTEACHGrant	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*FederalNursingScholarships	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*FederalWorkStudy	Non-negative Integer 0 to 99999	Need-based (FAFSA data required). Report all recipients.	No
*TERM*FederalNursingHealthLoans	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*FederalDirectSubsidizedLoans	Non-negative Integer 0 to 20000	Need-based (FAFSA data required). Report all recipients.	No
*TERM*FederalDirectUnsubsidizedLoans	Non-negative Integer 0 to 90000	Non-need based federal loans. Report all recipients.	No
*TERM*FederalParentPLUSLoans	Non-negative Integer 0 to 99999	Non-need based federal loans. Report all recipients.	No

Field/Column Header Name	Valid Inputs	Remarks	Changes?
*TERM*FederalGradPLUSLoans	Non-negative Integer 0 to 99999	Non-need based federal loans. Report all recipients.	No
*TERM*WACollegeGrant	Non-negative Integer 0 to 19000	Need-based (FAFSA or WASFA data required). Report all recipients.	No
*TERM*WCGApprenticeship	0	Zero for 2019-20. Report 2019-20 WCG Apprenticeships in WCG	No
*TERM*CollegeBoundScholarship	Non-negative Integer 0 to 12000	Need-based (FAFSA data required). Report all recipients.	No
*TERM*PassporttoCollegeScholarship	Non-negative Integer 0 to ~~6667~~ 7500	Need-based (FAFSA or WASFA data required). Report all recipients.	Yes
*TERM*PassporttoCollegeIncentiveGrant	Non-negative Integer 0 to 5000	Need-based (FAFSA or WASFA data required). Report only those who received incentive grants as direct student aid.	No
*TERM*NationalGuardGrant	Non-negative Integer 0 to 11540	Non-need based (FAFSA or WASFA data required). Report all recipients.	Yes
*TERM*AlternativeRoutes	Non-negative Integer 0 to 8000	Non-need based (FAFSA or WASFA data required). Report all recipients.	Yes
*TERM*Paraeducator	Non-negative Integer 0 to 4000	Non-need based (FAFSA or WASFA data required). Report all recipients.	Yes
*TERM*TeacherShortageConditionalScholarship	Non-negative Integer 0 to 8000	Non-need based (FAFSA or WASFA data required). Report all recipients.	Yes
*TERM*TeacherGrantPrograms	Non-negative integer 0 to 8000	Need-based (FAFSA or WASFA data required) Report all recipients	Yes
*TERM*WSOSBAScholarship	Non-negative Integer 0 to 7500	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*WSOSCareerTech	Non-negative Integer 0 to 10000	Need-based (FAFSA data optional). Report all recipients.	Yes

Field/Column Header Name	Valid Inputs	Remarks	Changes?
*TERM*SBCTCOpportunityGrant	Non-negative Integer 0 to 10000	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*OtherStateFundedGiftAssistance	Non-negative Integer 0 to 99999	Need-based (FAFSA or WASFA data optional). Report all recipients.	No
*TERM*OnCampusStateWorkStudy	Non-negative Integer 0 to 99999	Need-based (FAFSA or WASFA data required). Report all recipients.	No
*TERM*Off CampusStateWorkStudy	Non-negative Integer 0 to 99999	Need-based (FAFSA or WASFA data required). Report all recipients	No
*TERM*WorkForceTrainingFunds	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*NeedBasedInstitutionalGiftAid	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*NonNeedBasedInstitutionalGiftAid	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
*TERM*InstitutionalEmployment	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*InstitutionalLoans	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
*TERM*ConditionalLoans	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
*TERM*PrivateLoans	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
*TERM*OtherLoans	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
*TERM*OutsideScholarships	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No

Field/Column Header Name	Valid Inputs	Remarks	Changes?
*TERM*VABenefit	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	Yes
*TERM*OtherAgencyAssistance	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No

APPENDIX C: SYSTEM EDITS

Errors that prevent File Upload and Import

- File is not in CSV format (or is otherwise unreadable).

- File Header row is missing.

- File Header row is missing some of the column headings:
    - Headings must be spelled correctly without extra punctuation or spaces.
    - Headings can be in any order.
    - Any character casing in the headings will be accepted.

- File Header has 'extra' columns (i.e., columns not in the file specifications).

- SSN duplicated on multiple rows.

- Institution Student ID is not blank and duplicated on multiple rows.

- Data rows do not have the same number of columns as the header row.

- Required fields are missing values:
    - SSN
    - LastName
    - FirstName
    - Gender
    - IsStateResident
    - YearInSchool
    - RejectedISIRWASFA
    - EnrollmentStatus (for all five terms)
    - Financial Aid Received (for all five terms for all programs)

- Numeric columns do not contain valid numbers (numbers in URR are always integers).

- Selection columns (e.g., marital status, enrollment status, year in school) do not contain valid selections.

- Boolean (yes/no) columns do not contain valid codes.

- Date fields do not contain valid dates (e.g., '2004–0101' or '12/31/2019'). If commas are included in the dates, enclose the data in quotes.

Detailed Data Edit Errors

Edit	Overrideable
Alternative Routes Amount Differs from Awards On File	X
Alternative Routes Award Not Found In Awards On File	X
College Bound Scholarship Award Differs From CSAW	X
College Bound Scholarship Award Not Found In CSAW	X
College Bound Scholarship Recipient Not A State Resident	
Cost Of Attendance Is Required For FAFSA-Based and WASFA Aid Types	
Cost Of Attendance Minus EFC Does Not Equal Need	X
Cost Of Attendance Outside Expected Range	X
Date Of Birth Is Required For FAFSA-Based and WASFA Aid Types	
Date Of Birth Outside Expected Range	X
Dependent Student Minimum Family Size Must Be At Least 2	X
Duration Of Need Must Be In The Range Of 1 To 12 Months	X
Expected Family Contribution Is Required For FAFSA-Based and WASFA Aid Types	
Expected Family Contribution Outside Expected Range	X
Fall term Enrollment Status cannot be Not Enrolled when Fall term aid has been reported	X
Family Income Does Not Match CSAW Record	X
Family Income Is Required For FAFSA-Based and WASFA Aid Types	
Family Income, Need Amount, Expected Family Contribution, And Need Duration Must All Be Present Or All Blank	
Family Income Outside Expected Range	X
Family Size Is Required For FAFSA-Based and WASFA Aid Types	
Family Size Outside Expected Range 1-20	X
Federal GradPLUS Loan Recipient Must Be Reported As Graduate Student	
Federal ParentPLUS Loan Recipient Cannot Be Reported As Graduate Student	X
Is Dependent Is Required For FAFSA-Based and WASFA Aid Types	
Marital Status Is Required For FAFSA-Based and WASFA Aid Types	
Married Student Minimum Family Size Must Be At Least 2	X
National Guard Grant Amount Differs from Awards On File	X
National Guard Grant Award Not Found In Awards On File	X
Need Amount Cannot Exceed Cost Of Attendance	X
Need Amount Is Required For FAFSA-Based and WASFA Aid Types	
Need Amount Reported For Need Based Aid Recipient Is Outside Expected Range	
Need Duration Is Required For FAFSA-Based and WASFA Aid Types	
Number In College Cannot Be Greater Than Family Size	
Number In College Is Required For FAFSA-Based and WASFA Aid Types	
Number In College Outside Expected Range 1-20	X
Passport Recipient Not Independent	X
Passport To College Scholarship Award Differs from WSAC Records	X
Passport To College Scholarship Award Not Found in WSAC Records	X
Passport To College Scholarship Recipient Not a State Resident	

Edit	Overrideable
Paraeducator Amount Differs From Awards On File	X
Paraeducator Award Not Found In Awards On File	X
Spring Term Enrollment Status Cannot Be Not Enrolled When Spring Term Aid Has Been Reported	X
SSN Does Not Appear To Be a Valid Number	X
State Work Study No Valid Institutional SWS Allocation in Portal	
State Work Study Not A State Resident	
Student ISIR or WASFA Transaction Number Not Reported	X
Student Not Enrolled	X
Student Passport Incentive Not Found in Awards File	X
Sum of family size and number in college must match CSAW	X
Summer 1 term Enrollment Status cannot be Not Enrolled when Summer 1 term aid has been reported	X
Summer 2 term Enrollment Status cannot be Not Enrolled when Summer 2 term aid has been reported	X
Teacher Grant Programs Award Differs from WSAC Records	X
Teacher Grant Programs Award Not Found In WSAC Records	X
Teacher Shortage Conditional Scholarship Amount Differs From Awards On File	X
Teacher Shortage Conditional Scholarship Award Not Found In Awards On File	X
Total Aid Reported Is Zero	
Total Alternative Routes Outside Expected Range	X
Total College Bound Scholarship Outside Expected Range	X
Total Conditional Loans Outside Expected Range	X
Total Federal Direct Subsidized Loans Outside Expected Range	X
Total Federal Direct Unsubsidized Loans Outside Expected Range	X
Total Federal GradPLUS Loans Outside Expected Range	X
Total Federal Nursing Health Loans Outside Expected Range	X
Total Federal Nursing Scholarships Outside Expected Range	X
Total Federal ParentPLUS Loans Outside Expected Range	X
Total Federal PELL Grant Outside Expected Range	X
Total Federal SEOG Outside Expected Range	X
Total Federal TEACH Grant Outside Expected Range	X
Total Federal Work Study Outside Expected Range	X
Total Institutional Employment Outside Expected Range	X
Total Institutional Loans Outside Expected Range	X
Total National Guard Grant Outside Expected Range	X
Total Need-Based Institutional Gift Aid Outside Expected Range	X
Total Non-Need Based Institutional Gift Aid Outside Expected Range	X
Total Other Agency Assistance Outside Expected Range	X
Total Other Loans Outside Expected Range	X
Total Other State Funded Gift Assistance Outside Expected Range	X

Edit	Overrideable
Total Outside Scholarships Outside Expected Range	X
Total Paraeducator Outside Expected Range	X
Total Passport To College Scholarship Outside Expected Range	X
Total Passport To College Incentive Grant Outside Expected Range	X
Total Private Loans Outside Expected Range	X
Total State Work Study Outside Expected Range	X
Total Teacher Grant Programs Outside Expected Range	X
Total Teacher Shortage Conditional Scholarship Outside Expected Range	X
Total SBCTC Opportunity Grant Outside Expected Range	X
Total Washington College Grant Outside Expected Range	X
Total WorkForce Training Funds Outside Expected Range	X
Total WSOS BA Scholarship Outside Expected Range	X
Total WSOS Career Tech Scholarship Outside Expected Range	X
Washington College Grant Award Differs from CSAW	X
Washington College Grant Award Not Found In CSAW	X
Washington College Grant Recipient Not A State Resident	
Winter term Enrollment Status cannot be Not Enrolled when Winter term aid has been reported	X
WSOS BA Scholarship Recipient Not a State Resident	
WSOS Career Tech Recipient Not a State Resident	

APPENDIX D: QUICK LOOK-UP BY FINANCIAL AID PROGRAM

Financial Aid Program	Unit Record Report Field Name
3.5% or 4% waivers	NeedBasedInstitutionalGiftAid
Aerospace Loan Program (ALP)	OtherLoans
Alternative Routes to Teaching Certification	AlternativeRoutes
American Indian Endowed Scholarship	OtherStateFundedGiftAssistance
AmeriCorp	OtherAgencyAssistance
Athletic waiver	NeedBasedInstitutionalGiftAid or NonNeedBasedInstitutionalGiftAid
Basic Food Employment & Training (BFE&T)	WorkForceTrainingFunds
Bureau for Indian Affairs (BIA) Scholarship	OtherAgencyAssistance
Canadian, Micronesian, or Alaska Student Loans	OtherLoans
Career and Technical Scholarship	WSOSCareerTech
CBS	CollegeBoundScholarship
CCAMPIS	OtherAgencyAssistance
Chapters 31 and 33 veterans' benefits	VABenefit
College Bound Scholarship	CollegeBoundScholarship
Child Care Access Means Parents in School (CCAMPIS)	OtherAgencyAssistance
College Success Foundation Opportunity Scholarship (now Washington STEM; previously CSF)	WSOSBAScholarship
Company scholarships	OutsideScholarships
Conditional awards in special education	AlternativeRoutes, Paraeducator, or TeacherShortageConditionalScholarship
Early Achievers Opportunity Grant	OtherStateFundedGiftAssistance
Education and Training Voucher (ETV)	OtherAgencyAssistance
Employer funded tuition assistance	OutsideScholarships
Federal Grad PLUS Loans	FederalGradPLUSLoans
Federal Direct Subsidized Loans	FederalDirectSubsidizedLoans
Federal Direct Unsubsidized Loans	FederalDirectUnsubsidizedLoans
Federal Nursing Student Loan	FederalNursingHealthLoans
Federal nursing and other health professional training scholarships and grants	FederalNursingScholarships
Federal Parent PLUS Loans	FederalParentPLUSLoans
Federal Pell Grant	FederalPellGrant
Federal scholarships for TRIO students	OtherAgencyAssistance
Federal SEOG	FederalSEOG
Federal Subsidized Stafford Loans	FederalDirectSubsidizedLoans
Federal Supplemental Educational Opportunity Grant	FederalSEOG
Federal Unsubsidized Stafford Loans	FederalDirectUnsubsidizedLoans
Federal Work Study	FederalWorkStudy
Federal TEACH Grant	FederalTEACHGrant
GET Prepaid Tuition amounts	NOT TO BE REPORTED IN URR

Financial Aid Program	Unit Record Report Field Name
Global Opportunity Grant (UW only)	OtherStateFundedGiftAssistance
Gold Star Book Stipend	OtherStateFundedGiftAssistance
Governors' Scholarship (from CSF)	OutsideScholarships
Grad PLUS Loans	FederalGradPLUSLoans
Graduate Tuition Waivers	NeedBasedInstitutionalGiftAid or NonNeedBasedInstitutionalGiftAid
Health professions student loan funds	FederalNursingHealthLoans
Institutional aid fund (public institutions only)	NeedBasedInstitutionalGiftAid or NonNeedBasedInstitutionalGiftAid
Institutional aid fund disbursed as work	InstitutionalEmployment
Institutional grants and scholarships	NeedBasedInstitutionalGiftAid or NonNeedBasedInstitutionalGiftAid
Institutional loans	InstitutionalLoans
Leadership 1000 Scholarship (from CSF)	OutsideScholarships
L&I assistance	OtherAgencyAssistance
National Guard Grant	NationalGuardGrant
National Merit Scholarships	OutsideScholarships
Need-based institutional gift aid	NeedBasedInstitutionalGiftAid
Need-based tuition & fee waiver	NeedBasedInstitutionalGiftAid
Non-need based institutional gift aid	NonNeedBasedInstitutionalGiftAid
Non-need-based tuition & fee waiver	NonNeedBasedInstitutionalGiftAid
Non-work study institutional & off-campus employment	InstitutionalEmployment
Nonresident enrollment incentive waiver	NeedBasedInstitutionalGiftAid or NonNeedBasedInstitutionalGiftAid
Off-Campus State Work Study	OffCampusStateWorkStudy
On-Campus State Work Study	OnCampusStateWorkStudy
Opportunity Grant (from SBCTC)	SBCTCOpportunityGrant
Opportunity Scholarship (from Washington STEM/WSOS)	WSOSBAScholarship
Organizational scholarships	OutsideScholarships
Other agency assistance	OtherAgencyAssistance
Other conditional loans not reported elsewhere	ConditionalLoans
Other loans not reported elsewhere	OtherLoans
Other state scholarships (i.e., Oregon)	OutsideScholarships
Other state-funded gift assistance	OtherStateFundedGiftAssistance
Outside scholarships	OutsideScholarships
Paraeducator	Paraeducator
Passport to College Scholarship	PassporttoCollegeScholarship
Passport to College Incentive Grant	PassporttoCollegeIncentiveGrant
Parent PLUS Loans	FederalParentPLUSLoan
Pell Grant	FederalPellGrant
Pipeline for Paraeducators Conditional Scholarship	Paraeducator

Financial Aid Program	Unit Record Report Field Name
PLUS Loans	FederalGradPLUSLoan or FederalParentPLUSLoan
PREP loans	PrivateLoans
Private loans	PrivateLoans
Private scholarships	OutsideScholarships
Robert C. Byrd Honors Scholarship	OutsideScholarships
ROTC Scholarships	OtherAgencyAssistance
Rural Jobs Initiative (RJI)	WSOSCareerTech
SBCTC Opportunity Grant	SBCTCOpportunityGrant
SEOG	FederalSEOG
Service club scholarships	OutsideScholarships
Services for the Blind assistance	OtherAgencyAssistance
SEAG	OtherStateFundedGiftAssistance
SNG	WACollegeGrant
SSEH Pilot	OtherStateFundedGiftAssistance
Stafford Loans (subsidized)	FederalDirectSubsidizedLoans
Stafford Loans (unsubsidized)	FederalDirectUnsubsidizedLoans
State Need Grant	WACollegeGrant
State Work Study	OnCampusStateWorkStudy or OffCampusStateWorkStudy
State Work Study off-campus	OffCampusStateWorkStudy
State Work Study on-campus	OnCampusStateWorkStudy
Student Emergency Assistance Grant (SEAG)	OtherStateFundedGiftAssistance
Subsidized Stafford Loans	FederalDirectSubsidizedLoans
Supplemental Educational Opportunity Grant	FederalSEOG
SWS (off-campus)	OffCampusStateWorkStudy
SWS (on-campus)	OnCampusStateWorkStudy
Support Students Experiencing Homelessness (SSEH) Pilot	OtherStateFundedGiftAssistance
TEACH Grant	FederalTEACHGrant
Teacher Grant Programs	TeacherGrantPrograms
Teacher Shortage Conditional Scholarship	TeacherShortageConditionalScholarship
Tuition & fee waiver (need-based)	NeedBasedInstitutionalGiftAid
Tuition & fee waiver (non-need based)	NonNeedBasedInstitutionalGiftAid
Unsubsidized Stafford Loans	FederalDirectUnsubsidizedLoans
Veterans' benefits	VABenefit
Vocational Rehabilitation assistance	OtherAgencyAssistance
Washington Award for Vocational Excellence (WAVE	OtherStateFundedGiftAssistance
Washington College Bound Scholarship	CollegeBoundScholarship
Washington College Grant	WACollegeGrant
Washington College Grant Apprenticeship	WACollegeGrant (for 2020-21 only)
Washington Scholars	OtherStateFundedGiftAssistance
Washington State Achievers Scholarship	OutsideScholarships

Financial Aid Program	Unit Record Report Field Name
Washington State Opportunity Scholarship BA Scholarship (Washington STEM/WSOS)	WSOSBAScholarship
Washington State Opportunity Scholarship Career and Technical Scholarship (Washington STEM/WSOS)	WSOSCareerTech
Washington State Opportunity Scholarship Rural Jobs Initiative (RJI) (Washington STEM/WSOS)	WSOSCareerTech
Washington State Need Grant	WACollegeGrant
Washington Teacher Grant Programs	TeacherGrantPrograms
WAVE	OtherStateFundedGiftAssistance
WCG	WACollegeGrant
WCG Apprenticeship	WACollegeGrant (for 2019-20, include WCG Apprenticeship in WACollegeGrant)
Western Undergraduate Exchange Waiver (WUE)	NeedBasedInstitutionalGiftAid or NonNeedBasedInstitutionalGiftAid
Work-based Learning Tuition Assistance Funds	WorkForceTrainingFunds
Worker Retraining	WorkForceTrainingFunds
WorkFirst Work Study	InstitutionalEmployment
Workforce Investment Act assistance	OtherAgencyAssistance
Workforce Training Program	WorkForceTrainingFunds
WSOS BA Scholarship	WSOSBAScholarship
WSOS Career and Technical Scholarship	WSOSCareerTech
WSOS Rural Jobs Initiative (RJI)	WSOSCareerTech

APPENDIX E: QUICK LOOK-UP BY UNIT RECORD REPORT FIELD NAME

Unit Record Report Field Name	Financial Aid Programs
AlternativeRoutes	Alternative Routes to Teaching Certification
CollegeBoundScholarship	CBS
	College Bound Scholarship
	Washington College Bound Scholarship
ConditionalLoans	Other conditional loans not reported elsewhere
FederalGradPLUSLoans	Federal Grad PLUS Loans
	Grad PLUS Loans
	PLUS Loans
FederalNursingHealthLoans	Federal Nursing Student Loan
	Health professions student loan funds
FederalNursingScholarships	Federal nursing and other health professional training scholarships and grants
FederalParentPLUSLoans	Federal Parent PLUS Loans
	Parent PLUS Loans
	PLUS Loans
FederalPellGrant	Federal Pell Grant
	Pell Grant
FederalSEOG	Federal SEOG
	Federal Supplemental Educational Opportunity Grant
	SEOG
	Supplemental Educational Opportunity Grant
FederalDirectSubsidizedLoans	Federal Subsidized Stafford Loans
	Federal Direct Subsidized Loans
	Stafford Loans (subsidized)
	Subsidized Stafford Loans
FederalDirectUnsubsidizedLoans	Federal Unsubsidized Stafford Loans
	Federal Direct Unsubsidized Loans
	Stafford loans (unsubsidized)
	Unsubsidized Stafford loans
FederalTEACHGrant	Federal TEACH Grant
	TEACH Grant
FederalWorkStudy	Federal Work Study
InstitutionalEmployment	Non-work study institutional & off-campus employment
	WorkFirst Work Study
	Institutional aid fund disbursed as work

Unit Record Report Field Name	Financial Aid Programs
InstitutionalLoans	Institutional loans
NationalGuardGrant	National Guard Grant
	NGG
NeedBasedInstitutionalGiftAid	3.5% or 4% waivers
	Athletic waivers (need-based)
	Graduate tuition waivers (need-based)
	Institutional aid fund (need-based)
	Institutional grants and scholarships (need-based)
	Need-based institutional gift aid
	Need-based tuition & fee waivers
	Nonresident enrollment incentive waiver (need-based)
	Tuition & fee waivers (need-based)
	Western Undergraduate Exchange Waiver (need-based)
NonNeedBasedInstitutionalGiftAid	Athletic waivers (non-need based)
	Graduate tuition waivers (non-need based)
	Institutional aid fund (non-need based)
	Institutional grants and scholarships (non-need based)
	Non-need based institutional gift aid
	Non-need based tuition & fee waiver
	Nonresident enrollment incentive waiver (non-need based)
	Tuition & fee waiver (non-need based)
	Western Undergraduate Exchange Waiver (non-need based)
OffCampusStateWorkStudy	Off-campus State Work Study
	State Work Study off-campus
	SWS (off-campus)
OnCampusStateWorkStudy	On-campus State Work Study
	State Work Study on-campus
	SWS (on-campus)

Unit Record Report Field Name	Financial Aid Programs
OtherAgencyAssistance	AmeriCorp
	Bureau of Indian Affairs (BIA) Scholarship
	Child Care Access Means Parents in School (CCAMPIS)
	Education and Training Vouchers (ETV)
	Federal scholarships for TRIO students
	L&I assistance
	Other agency assistance
	ROTC Scholarships
	Services for the Blind assistance
	Vocational Rehabilitation assistance
	Workforce Investment Act assistance
OtherLoans	Aerospace Loan Program (ALP)
	Canadian, Micronesian or Alaska Student Loans
	Other loans not reported elsewhere
OtherStateFundedGiftAssistance	American Indian Endowed Scholarship
	Early Achievers Opportunity Grant
	Global Opportunity Grant (UW only)
	Gold Star Book Stipend
	Other state funded gift assistance
	Student Emergency Assistance Grant (SEAG)
	Supporting Students Experiencing Homelessness (SSEH) Pilot
	Washington Award for Vocational Excellence (WAVE)
	WAVE
	Washington Scholars
OutsideScholarships	Company scholarships
	Employer funded tuition assistance
	Governors' Scholarship (from CSF)
	Leadership 1000 Scholarship (from CSF)
	National Merit Scholarships
	Organizational scholarships
	Other state scholarships (i.e., Oregon)
	Outside scholarships
	Private scholarships
	Robert C. Byrd Honors Scholarship
	Service club scholarships
	Washington State Achievers Scholarship
Paraeducator	Paraeducator
	Pipeline for Paraeducators
PassporttoCollegeScholarship	Passport To College Scholarship
PassporttoCollegeIncentiveGrant	Passport To College Incentive Grant
PrivateLoans	Private loans
	PREP Loans

Unit Record Report Field Name	Financial Aid Programs
SBCTCOpportunityGrant	Opportunity Grant (from SBCTC)
	SBCTC Opportunity Grant
TeacherGrantPrograms	Student Teaching Grant
	Teacher Grant Programs
TeacherShortageConditionalScholarship	Teacher Shortage Conditional Scholarship
	TSCS
VABenefit	VA Benefits
	Veteran's Benefits
	Chapter 31 or 33 VA Benefits
WACollegeGrant	SNG
	State Need Grant
	WCG
	Washington College Grant
	Washington State Need Grant
WCGApprenticeship	Include in WACollegeGrant for 2020-21 URR
WSOSBAScholarship	College Success Foundation Opportunity Scholarship (previously with CSF; now with Washington STEM/WSOS)
	Opportunity Scholarship (from Washington STEM/WSOS)
	Washington State Opportunity Scholarship (from Washington STEM/WSOS)
	Washington State Opportunity Scholarship BA Scholarship
	WSOS BA Scholarship
WSOSCareerTech	Washington State Opportunity Scholarship Career and Technical Scholarship
	WSOS Career and Technical Scholarship
	Washington State Opportunity Scholarship Rural Jobs Initiative (RJI)
	WSOS Rural Jobs Initiative (RJI)
WorkForceTrainingFunds	Basic Food Employment & Training (BFE&T)
	Work-based learning tuition assistance funds
	Worker Retraining
	WorkForce Training Program