

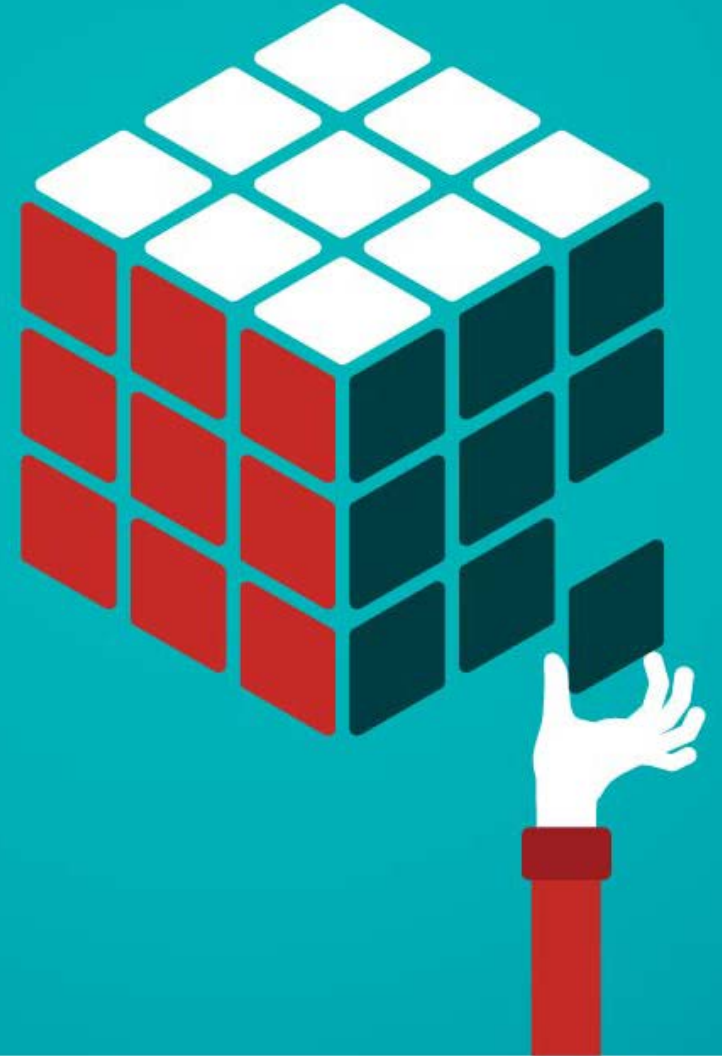


# Unit Record Report

*Submitting the 2017-18 Report  
and SBCTC ctclink Update*

Training Webinar Presentation

August 30, 2018





# Presenters on the Webinar

**Stephanie Casino**, Functional Analyst, SBCTC PeopleSoft Financial Aid

**Carla Idohl-Corwin**, Senior Associate Director, WSAC

**Marla Skelley**, Associate Director, WSAC

**Ann Voyles**, Program Associate, WSAC





# Purpose of the Unit Record Report

- Provide institutional reports and profiles
- Assess the needs of students
- Guide legislative and other policy decisions
- Inform changes to state aid programs
- Minimize ad hoc data requests to institutions



# Timeline

- **URR Manual available electronically:**  
<http://www.wsac.wa.gov/unit-record>
- **August 13:** Unit Record Report (URR) application opens
- **October 19:** Finalized report due
- **October/November:** WSAC analysis
- **December:** Reports to policy makers
- **January 2019:** Institutional profiles available



# Manual Overview

- **Introduction**
  - Overview, purpose, changes, and timeline
- **Chapter 1 – General Instructions**
- **Chapter 2 – Data Definitions**
- **Chapter 3 – Reporting Application User's Guide**
- **Appendices**



# Manual Overview, continued

- **Appendices**

- A – Need-Based and Non-Need Based Program Recipients to Report

- B – Record Layout – File Format and Valid Inputs

- C – System Edits that Prevent File Upload and Import

- D – Quick Lookup by Financial Aid Program

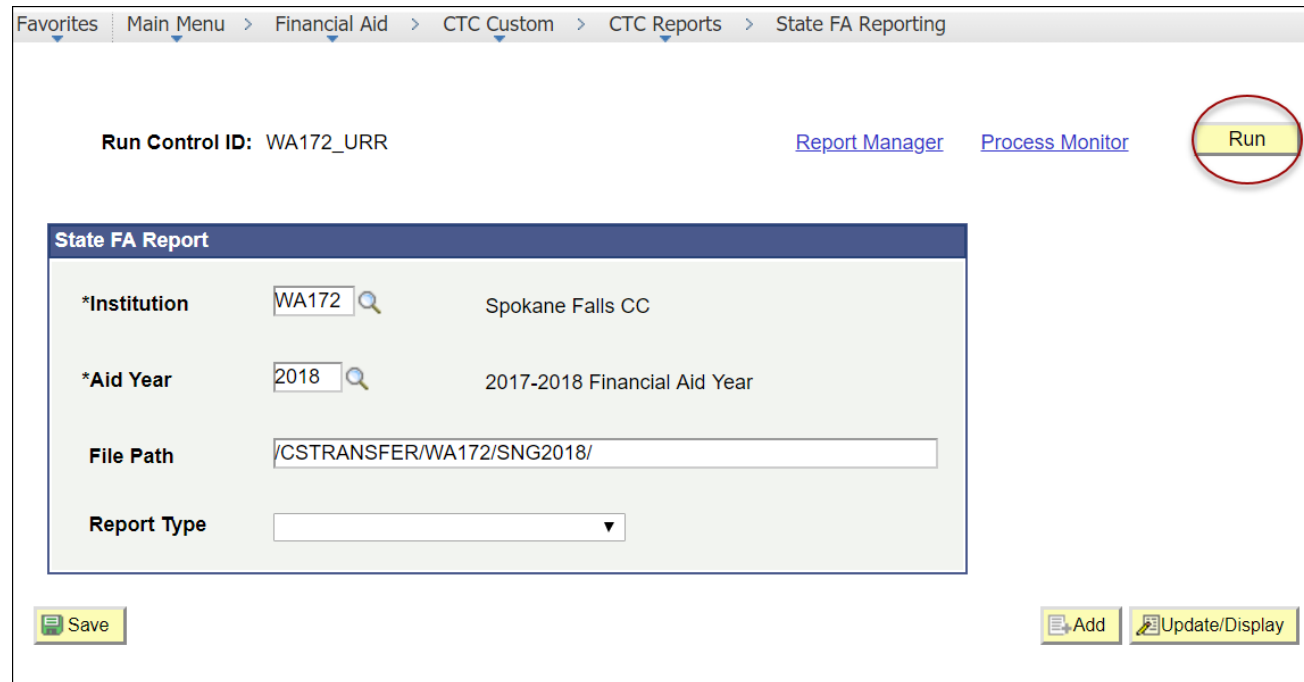
- E – Quick Lookup by Unit Record Report Field Name





# Portal CSV File Submission

- **Building a CSV file for submission**
  - Report only students who received financial aid based on the 2017-18 FAFSA (or WASFA) year.
  - Report files in CSV format with a header row.
  - Review the field definitions in Chapter 2 of the Manual and the record layout in Appendices B and C to determine valid field content.

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



The screenshot shows the 'State FA Reporting' interface in the ctcLink system. The breadcrumb navigation at the top reads: Favorites > Main Menu > Financial Aid > CTC Custom > CTC Reports > State FA Reporting. The 'Run Control ID' is WA172\_URR. There are links for 'Report Manager' and 'Process Monitor', and a yellow 'Run' button circled in red. The 'State FA Report' form contains the following fields:

State FA Report	
*Institution	WA172  Spokane Falls CC
*Aid Year	2018  2017-2018 Financial Aid Year
File Path	<input type="text" value="/CSTRANSFER/WA172/SNG2018/"/>
Report Type	<input type="text"/>

At the bottom of the form are three buttons: 'Save', 'Add', and 'Update/Display'.



- Select 'Unit Record Report'
- Click OK button
- Report file is generated in csv format with header row- which includes who received awards for 17-18 aid year

Favorites | Main Menu > Financial Aid > CTC Custom > CTC Reports > State FA Reporting

### Process Scheduler Request

User ID [REDACTED] Run Control ID WA172\_URR

Server Name [dropdown] Run Date 08/10/2018 [calendar icon]

Recurrence [dropdown] Run Time 8:25:47AM [Reset to Current Date/Time]

Time Zone [dropdown]

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input type="checkbox"/>	State Need Grant Report	CTC_SNGRP_AE	Application Engine	Web	TXT	<a href="#">Distribution</a>
<input checked="" type="checkbox"/>	Unit Record Report	CTC_URR_AE	Application Engine	Web	TXT	<a href="#">Distribution</a>



# Reporting Requirements

- **Determine which students to report**
  - Need-Based Recipients – 2017-18 FAFSA (or WASFA) required.
  - Need-Based Aid Recipients – other programs where FAFSA (or WASFA) data may or may not be available.
  - Non-Need Based Federal Loan Recipients (i.e., Federal Direct Unsubsidized Loans, Federal Parent PLUS Loans, and Federal Grad PLUS Loans).

*Appendix A in the Manual details these categories*



# Reporting Requirements

- **Need-Based Recipients**

- Intent is to capture all financial aid disbursements in a Unit Record Report.
- Report this year all financial aid received based on filing of the 2017-18 FAFSA (or WASFA).
- Report on next year's URR all financial aid received based on the 2018-19 FAFSA (or WASFA).

- **The ctcLink Unit Record Report selects:**
  - Need-Based Recipients
  - Non Need-Based Federal Loan Recipients



# Programs to Report

- **Need-Based Recipients – FAFSA fields required**

- Federal Pell Grant
- Federal SEOG
- Federal Work Study
- Federal Perkins Loan
- Federal Direct Subsidized Loan
- State Need Grant\*
- College Bound Scholarship\*
- Passport to College Scholarship\*
- State Work Study (On- and Off-Campus)\*\*
- Teacher Shortage Conditional Grant\*
- Need-Based Institutional Gift Aid

\* **FAFSA or WASFA required**

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



# Programs to Report

- **Need-Based Recipients – Other Programs**

- Federal TEACH Grant
- Federal Health Professional Scholarships & Grants
- Federal Health Professional Loans
- Opportunity Scholarship
- Other State Funded Assistance
- Worker Retraining Program Funds
- Need-Based Institutional Gift Aid
- Institutional Employment (if need based)



# Basic Food Employment and Training (BFE&T or BFET)

- If your need-based recipients receive BFET funds and they are easily reportable from your system, include the amounts received for the same period of time reported for your recipients.
- Should be reported as WorkForceTrainingFunds



# Programs to Report

- **Federal Non-Need Based Loan Recipients**
  - Federal Direct Unsubsidized Loan
  - Federal Parent PLUS Loan
  - Federal Grad PLUS Loan

*Note: The information reported will be minimal for Federal loan recipients who are not also receiving need-based assistance.*



- **Global Setup for the ctcLink Unit Record Report :**
  - Ethnicity Category
  - Award Category:
    - Need-Based FAFSA/WASFA data Required or Optional
    - Non Need-Based Loans or Other
    - Award Maximum Amounts

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



# Changes for the 2017-18 Unit Record Report Portal

- **Refer to Page iii in the Manual**
- **Cost of Attendance (COA) and Tuition Waivers**
  - Report full assessed tuition amounts in COA before application of tuition waiver(s). Required beginning 2017-18.
  - Report waivers as either Need- or Non-Need Based Institutional Gift Aid, as appropriate.



# Changes for the 2017-18 Unit Record Report Portal

- **Consistency with other WSAC Reporting**
  - Edits for SNG, CBS, and PTC data will be compared against CSAW data. Formerly, compared to Final Interim Report
- **Race/Ethnicity Data** – Any blank fields will be counted as ‘N’ or ‘false.’ Prefer entry of ‘Y’ or ‘N’ notation in any field, where data is known
- **Teacher Shortage Conditional Grant** – State program with first disbursements in 2017-18. Report as ‘ConditionalLoans’



## Valid Input Ranges – Changes for 2017-18

Category	Old Value	New Value
Federal Pell Grant	0 to 5815	0 to 8880
Federal TEACH Grant	0 to 4000	0 to 99999



# Reporting Requirements

- **For all financial aid recipients reported**
  - Required fields:
    - SSN
    - First Name
    - Last Name
    - Gender
    - Is State Resident
    - Year In School
    - Financial Aid per term – even if ‘0’
    - Enrollment Status per term
  - Report Financial Aid for each of five terms
  - Report Enrollment status for each of five terms
  - Report non-need based aid received for all need-based recipients



# Reporting Requirements

- **CSV file requires header row (sample is available)**
- **Financial aid reported for each of five terms:**
  - Summer 1 (used primarily for leader/header awards)
  - Fall
  - Winter (semester schools to report as zeros '0')
  - Spring
  - Summer 2 (used primarily for trailer awards)



# Reporting Requirements

- **When to include summer aid in your reporting**
  - Review Chapter 2 of Manual for detailed information.
  - Summer aid reported are amounts received based on 2017-18 FAFSA or WASFA.
  - In general:
    - Leader/Header schools to report Summer 1 aid (Report Summer 2 as ‘0’)
    - Trailer schools to report Summer 2 aid (Report Summer 1 as ‘0’)
    - Clock hour schools may report aid for both summer terms
  - If recipient enrolled more than one “term” in same summer – report total amount received and enrollment status as one enrollment term.





# FAFSA & WASFA Related Fields

- **Fields to also report for 2017-18 FAFSA & WASFA filers**
  - Marital Status
  - Is Dependent
  - Family Size
  - Number in College
  - Family Income
  - Expected Family Contribution (EFC)
  - Cost of Attendance (COA)
  - Need Duration
  - Need Amount

# SPECIAL NOTES ABOUT SELECTED FIELDS





# Social Security Numbers

- Duplicates are not accepted.
  - Files containing duplicate SSNs will not upload.
- SSNs of State Need Grant and College Bound Scholarship recipients will be compared to the SSNs reported in the SNG/CBS CSAW records.
- SSNs of Passport to College recipients will be compared to recipient Portal records.
- Discrepancies will show on edit reports.



# Year in School

'1' or 'Freshman/1st Year'

'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 2017-18 year.



# Year in School – Considerations

- Do not automatically use the Year in School reported on FAFSA or WASFA.
- Report the highest Year in School for which the student attended when the student's financial aid was disbursed.
- Code '8' or 'Other' – Use to report need-based aid for Running Start students or other students who have not yet graduated from high school.

- **Year in School:**

- Value is reported as beginning of the term for the student's last financial aid disbursement for the year.
- Combination of earned units (between the ranges indicated in URR manual), whether or not the students are matriculated into BAA/BAS program, and NSLDS Loan year on FA Term.



# Family Information

- **Family Size**

- Generally reported from the FAFSA or WASFA
- Must be 2 or higher for dependent students
- Must be 1 or higher for independent students

- **Number in College**

- Must be 1 or higher
- Cannot exceed the Family Size
- Parents' enrollment in college should not be included unless it was a professional judgment



# Family Income

- **Report the Family Income (taxable and untaxed) based on a review of the 2017-18 FAFSA or WASFA**
  - Usually will be the 2015 income from FAFSA or WASFA.
  - If a professional judgment decision was made, report that income.
  - Report integers without dollar signs or cents (e.g., 44010 and -10123).
  - The only place in the file where negative numbers can be used.



- **Family Income:**

- Income values pulled from the State Need Grant Eligible Data page
  - If the student is Dependent, only the parent(s) taxable and non-taxable income are included
  - If the student is Independent, both the student's and spouse's taxable and non-taxable income are included
  - Negative family income values will be included, if applicable



# Expected Family Contribution

- **Report the Expected Family Contribution (EFC)**
  - Will be the Federal Methodology (FM) calculation produced by U.S. Department of Education based on the 2017-18 FAFSA, or the WASFA, EFC.
    - Report FM EFC if Institutional Methodology produces different EFC
  - May be adjusted by professional judgment decisions.
  - Should reflect the number of months reported in Need Duration.



# Cost of Attendance

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



# Need Amount

## **Cost of Attendance**

- **Expected Family Contribution**

**= Need Amount**

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



# Need Duration

- Report Need Duration based on the number of months for which the Need Amount and Cost of Attendance were reported.
- Normally report as integers from 1 - 12.



# Term Enrollment Status

Undergraduate Enrollment Status	Credits	Scheduled Clock Hours	URR Codes
Not Enrolled	n/a	n/a	'0' or 'Not enrolled'
Full-Time	12.0 or more	300 or more *	'1' or 'Full time'
Half-Time	6.0 – 8.9	150 – 224	'2' or 'Half time'
Three-Quarter Time	9.0 – 11.9	225 – 299	'3' or '3/4 time'
Less Than Half-Time	3.0 – 5.9	75 – 149	'5' or '< Half time'

\*Typically, clock hour term awards are for full time enrollment status, except that the final term may be paid for part-time enrollment status

- **Term Enrollment Status**

- Enrollment statuses are pulled from the FA Load field on the FA Term page
- FA Term values are translated and included in the csv data file.
  - F = 'Full time'
  - T = '3/4 time'
  - H = 'Half time'
  - L = '< Half time'
  - N = 'Not Enrolled'



# Reporting Term Enrollment

## Approximate Term Date Ranges for Clock-Hour Institutions

Term	From	To
Summer 1	July 1, 2017	September 11, 2017
Fall	September 12, 2017	November 22, 2017
Winter	November 23, 2017	February 5, 2018
Spring	February 6, 2018	April 18, 2018
Summer 2	April 19, 2018	June 30, 2018





# State Need Grant, College Bound Scholarship, and Passport to College

- Report the final awards received by the student.
- The Unit Record Reporting tool checks against CSAW records – **Critical.**
- Review the “SNG, CBS, & Passport Differences Report” to verify all recipients and awards are correctly reported.



# Reporting of tuition waiver dollars for SNG and CBS recipients

- Required for 2017-18
  - Accurate representation of all forms of assistance that needy students are receiving.
  - Include the full assessed tuition & fee amounts in each student's Cost of Attendance to reflect tuition prior to application of waiver(s).
  - Report waivers as a financial aid resource in the appropriate field:
    - Need-Based Institutional Gift Aid
    - Non-Need Based Institutional Gift Aid



# State Work Study

- Report on-campus & off-campus employment separately.
- Report students' total gross earnings, including employer match or institutional share.
- Include summer employment.

## Report either:

- Actual gross earnings based on monthly cut-off dates or institutional payroll dates.
- Average gross term earnings over the academic year for all terms student was enrolled at least half-time.



# Institutional Gift Aid

## Report Institutional Gift Aid as either:

- Need-Based Institutional Gift Aid – all institutional grants, scholarships, and/or waivers awarded solely or partially on a review of the 2017-18 FAFSA or WASFA.
- Non-Need Based Institutional Gift Aid – all institutional grants, scholarships, and/or waivers awarded without regard to the FAFSA or WASFA (i.e., includes institutional funds awarded to Running Start or non-matriculated students).



# Other State Funded Gift Assistance

## Report sources of state aid not reported elsewhere.

Examples include:

- American Indian Endowed Scholarship
- Washington Scholars
- Early Achievers Opportunity Grant
- Global Opportunity Grant (UW only)

# EDITS



# Edits to Ensure Data Quality

- Edits help ensure data quality.
- Edits are “softer” for students receiving only Non-Need Based Federal Loans.
- FAFSA related edits also are “softer” for students not receiving FAFSA (or WASFA) required aid types.



# Edits that Prevent File Upload

## Refer to **Appendix C (page 45)** in the Manual

Examples of errors that prevent upload:

- Header row missing or invalid
- Duplicate SSNs
- Invalid codes
- Blanks reported in required fields

*Be sure to review all 12 items!*





# Non-Overrideable Edit Examples

- **Refer to Appendix C (page 46-48) in the Manual**
  - Total Aid Reported is Zero
  - Non-resident with SNG or other state aid
  - Number in College is greater than Family Size



# Overrideable Edit Examples

- **Refer to Appendix C (pages 46-48) – Field Content**

- Need Amount is Zero with Need Based Aid.

Budget changed with dropped credits

- Year in School for Aid Type (Federal Grad PLUS Loan).

Student graduated mid-year

- Date of Birth outside normal range.

- Cost of Attendance minus Expected Family Contribution (calculated by the edit program) does not equal Need Amount reported by college.

- **Edit Reports**

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

- **Report C (CTCFAURR\_C)-Missing Item Type Report**

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

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

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



# Reminders

- Keep Override comment(s) concise and to the point, but with sufficient detail to directly address the edit message.
- Report Family Income using SNG income calculation, not federal Total Income field from FAFSA. Should match income reported in CSAW student record for 2017-18.
- In the Override comment, include the FAFSA transaction number used to award the student when addressing URR/CSAW discrepancies related to Family Income, Family Size, Number in College, or Expected Family Contribution.



## Reminders, continued

- Report an adjusted Expected Family Contribution according to Need Duration if student attended less than full time/full year.
- Report all known Race categories for each student, even where Hispanic Origin is marked 'Y' (eliminates gaps in research data).

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





# Tips and Best Practices

- Upload your CSV file early – don't wait for the deadline!
- Review 2017-18 URR Manual and training materials, and test upload using the Portal training environment:

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

(Data entered is temporary; information clears overnight)

- Use URR informational reports to check for consistency & validity.
- CTCs – Review SBCTC 2017-18 URR Manual when available.
- Contact WSAC with questions or problems not addressed in Manual.

# USING THE WEB APPLICATION



# Logon to the Portal

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

The screenshot shows a web browser window titled "WSAC Portal - Login" with the URL <https://fortress.wa.gov/wsac/portal/>. The page features the Washington Student Achievement Council logo and a navigation menu with items like "Apps", "Home | Council Conf", "Imported", "NASSGAP Annual Su", "Webinar Recordings", and "WSAC Person Merge".

The main content area includes a login form with two input fields: "email address" and "password (forgot it?)", followed by a "Login" button. An orange arrow points from the top right towards the login form. Below the login form is a large banner image of a red apple on a wooden surface against a green chalkboard background.

Below the banner, there are three columns of links:

- Middle/High School Staff**
  - [Enter College Bound applications](#) for students
  - [Request](#) a GEAR UP account
  - [View FAFSA Completion statistics](#) for public school students
- Financial Aid Administrators**
  - [CSAW](#)
  - [Unit Record Report](#)
- Students/Parents/Other**
  - [Register](#) for a username and password
  - [Apply](#) for the College Bound Scholarship
  - [Register](#) as a Health Professional

At the bottom of the page, there are several logos: "READY SET GRAD", "theWashBoard.org", "GET Guaranteed Education Tuition", "GEAR UP WASHINGTON STATE", "College Bound Scholarship WASHINGTON", and "WASHINGTON OPPORTUNITY PATHWAYS". An orange arrow points from the bottom center towards the "Unit Record Report" link.



# URR Portal Submission Tool

In the Programs menu, click on Unit Record.

The screenshot shows the top navigation bar of the WSAC portal. The 'Programs' menu is expanded, showing a list of options: American Indian, College Bound, Passport, SNG, Teacher, Unit Record, and WA Scholars. Two orange arrows point to the 'Programs' menu and the 'Unit Record' option. The main content area of the page is partially obscured by the menu.

Home ▾

Admin ▾ | Common ▾ | Csaaw ▾ | Programs ▾

**Welcome to the WSAC portal.**

This site contains confidential student information on financial aid applicants provided by Washington Student Achievement Council. This site is for use only by authorized WSAC staff, institution staff, employers, and students. This site is not for use by the general public.

By logging in to this tool, I acknowledge the following responsibilities include:

- Protecting WSAC data in accordance with the Family Educational Rights and Privacy Act (FERPA).
- Protecting user authentication information from use by unauthorized persons.
- Using WSAC data only for purposes of administering and assisting students with state financial aid programs.



# URR Portal Submission Tool

## Welcome to the Unit Record Report Warehouse!

### The Process:

1. Upload your student data file
2. Address any errors in the data and override as necessary
3. Optionally review or add individual student records
4. When the data is complete, review and submit the report

Next: Proceed to Upload

- The welcome screen will appear on your first login.
- From the welcome screen, click “Next: Proceed to Upload.”
- After uploading URR data, you will be taken directly to the current step for subsequent logins: “Ready to Begin,” “In Progress,” or “Submitted.”

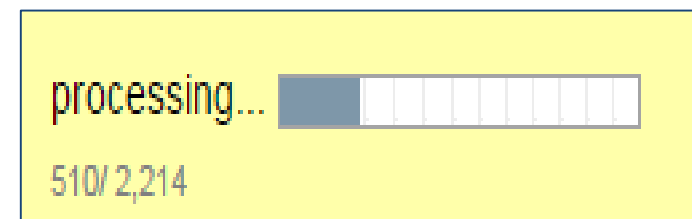


# Uploading Data from File

PLEASE NOTE: Each upload attempt represents a FRESH start. All existing data for the year will be deleted.  
**Large CSV files (over 10MB) should be zipped before uploading.**

No file selected...   Or [Add Students Manually](#)

- Browse to select a CSV file
- Upload



For large upload files, a progress bar allows the user to see how much of the file has been reviewed for upload errors.



# Uploading Data from File

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

Row #

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

Row 79: Field 'LastName' is required

Field error name

discard file

Discard button

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



# Uploading Data from File

## Discard Upload button:

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

## Upload Unit Record Data

### Processing file...

initializing...

discard upload



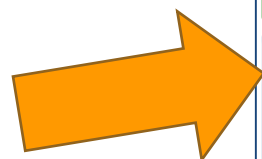




# Uploading Data from File

Once the file upload is complete, verify the total number of students and the number of students by year in school.

Proceed to edits.



**File Upload Complete!**

Press 'Proceed to Edits' if the uploaded data appears to be correct. Otherwise, press 'Discard Upload' to start again.


[Proceed to Edits](#) [Discard Upload](#)

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



# Processing Edits

This may take a while. Edits can be fixed while the Portal reviews remaining records for edits. Periodically click “Refresh.”

processing...   
230/ 457

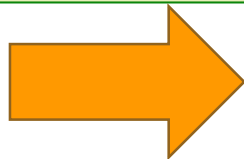
We're currently processing your edits. You may work on resolving edits as we process them. You can also leave this page or log out and come back when processing is complete.

Alternatively, we can [email you a csv download](#) of all your edits once processing completes.

**Unit Record Edits**

Showing results 1 - 4 of 4

<u>SSN</u>	<u>Student ID</u>	<u>Last</u>	<u>First</u>	<u>Middle</u>	<u>Error</u>	<u>Overridable</u>
<a href="#">999999559</a>	Stu0484	Smith	A		Student not Enrolled	Overrideable
<a href="#">999999560</a>	Stu0483	Johnson	D	D	College Bound Scholarship award not found in WSAC records	Overrideable



refresh



# Processing Edits

Filter by Edit Type, or Sort by SSN, Student ID, Name, Error message, or Overrideable status.

Last processed on 6/13/2018 4:16:40 PM [download all edits into csv](#) [Reprocess Edits](#) [Delete Upload](#) [Add a new unit record to the report](#)

## Unit Record Edits

28 errors (21 overrideable - 0 overridden; 0 informational)

Filter by Edit Type

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

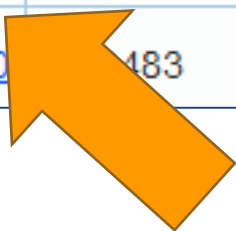


# Processing Edits

The file cannot be submitted until all Non-Overrideable edits are corrected, and all Overrideable edits either are fixed or overridden with a reason.

To override or edit student data, click on student's SSN to open the record.

<u>SSN</u>	<u>Student ID</u>	<u>Last</u>	<u>First</u>	<u>Middle</u>	<u>Error</u>	<u>Overrideable</u>
<a href="#">999999559</a>	Stu0484	Smith	A		Student not Enrolled	Overrideable
<a href="#">999999560</a>	483	Johnson	D	D	College Bound Scholarship award not found in WSAC records	Overrideable





# Processing Edits

101-11-1111      Adrenaline, Rush A      [Add a new Unit Record](#)

**Errors**

Fall term Enrollment Status cannot be Not Enrolled when Fall term aid has been reported

State Need Grant Amount Differs From CSAW (CSAW: 0; unit record: 659)

State Need Grant award not found in CSAW

**Student Demographics and Need**      **Student Aid**

SSN or WASFA Id       Institution Student Id

Last Name       First Name       Marital Status

Date of Birth       Is Dependent       Middle Name

Gender       Family Size       Year in School

Is State Resident       # Family in College

**Need**

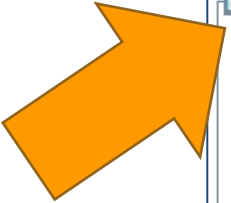
+ Cost of Attendance       Total Family Income

- Expected Family Contribution       Need Duration (months)

= Need Amount

Ethnicity/Race

               [Return to the Edit List](#)





# Processing Edits

Edit the data or override with a reason. Click “Save.”

101-11-1111 Adrenaline, Rush A [Add a new Unit Record](#)

**Errors**

- Fall term Enrollment Status cannot be Not Enrolled when Fall term aid has been reported [+ Override](#)
- State Need Grant Amount Differs From CSAW (CSAW: 0; unit record: 659) [+ Override](#)
- State Need Grant award not found in CSAW [+ Override](#)

**Student Demographics and Need** **Student Aid**

	Summer 1	Fall	Winter	Spring	Summer 2	Total
<b>Enrollment Status</b>	Not enrolled ▾	Not enrolled ▾	Full time ▾	Full time ▾	Full time ▾	
<b>Federal Pell Grant</b>	0	Not enrolled	0	2865	0	5730
<b>Federal SEOG</b>	0	Full time	0	0	0	500
<b>Federal TEACH Grant</b>	0	Half time	0	0	0	0
<b>Federal Nursing Scholarships</b>	0	3/4 time	0	0	0	0
<b>Federal Work Study</b>	0	< Half Time	0	0	0	0
<b>Federal Perkins Loan</b>	0	0	0	0	0	0
<b>Federal Nursing Health Loans</b>	0	0	0	0	0	0
<b>Federal Direct Subsidized Loans</b>	0	0	0	0	0	3500

**Federal**

<<Prev Next>> [Save](#) [Delete](#) [Return to the Edit List](#)



# Processing Edits

- If overriding, enter reason in the pop-up box and click “save.”

Override Unit Record Edit Error

Edit: **State Need Grant Amount Differs From CSAW**

Override Comment -

Save Cancel

- Hover mouse over the information icon to review the override reason.

222-22-2223 Aardvark, Angus

Comment will show here

Errors

State Need Grant Amount Differs From CSAW (CSAW: 0; unit record: 1976) Overridden by State Need Grant award not found in CSAW

+ Override

Student Demographics and Need Student Aid

	Summer 1	Fall	Winter
Enrollment Status	Full time	Full time	F
Federal Pell Grant	2865	2865	0



# Check for Missing Data Previously Reported in WSAC Records

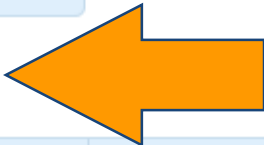
Click “Show SNG/CBS/PTC differences report” from the Edit page.

Last processed on 6/26/2018 1:47:50 PM [download all edits into csv](#) [Reprocess Edits](#) [Delete Upload](#) [Add a new unit record to the report](#)

### Unit Record Edits

9 errors (9 overrideable - 9 overridden; 0 informational)  Show Informational  Overridden

All edits have been addressed [Click To Continue](#) →

Showing results 1 - 9 of 9 [Show SNG/CBS/PTC differences report](#) 

<a href="#">SSN</a>	<a href="#">Student ID</a>	<a href="#">Last</a>	<a href="#">First</a>	<a href="#">Middle</a>	<a href="#">Error</a>	<a href="#">Overrideable</a>
<a href="#">101111111</a>		Adrenaline	Rush	A	State Need Grant Amount Differs From CSAW (CSAW: 0; unit record: 659)	Overridden





# Check for Missing Data Previously Reported in WSAC Records


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

**SNG, CBS & Passport Differences Between Unit Record and CSAW.** [Go to Edit List](#)

State Need Grant   College Bound Scholarship   **Passport To College**   Missing SNG Unserved Students

[Download differences to csv](#)

<u>SSN</u>	<u>Last, First</u>	<u>SID</u>	<u>WSAC Passport</u>	<u>Unit Record</u>	<u>Difference</u>	<u>Override Requested</u>
444-44-4445	Actor, Shakespeare J			<u>\$3,000.00</u>	\$3,000.00	Y





# Check for Missing Data Previously Reported in WSAC Records

If unaddressed discrepancies also exist, click “Download differences to csv” to review a separate file and identify missing student records that must be added or corrected.

SNG, CBS & Passport Differences Between Unit Record and CSAW. [Go to Edit List](#)

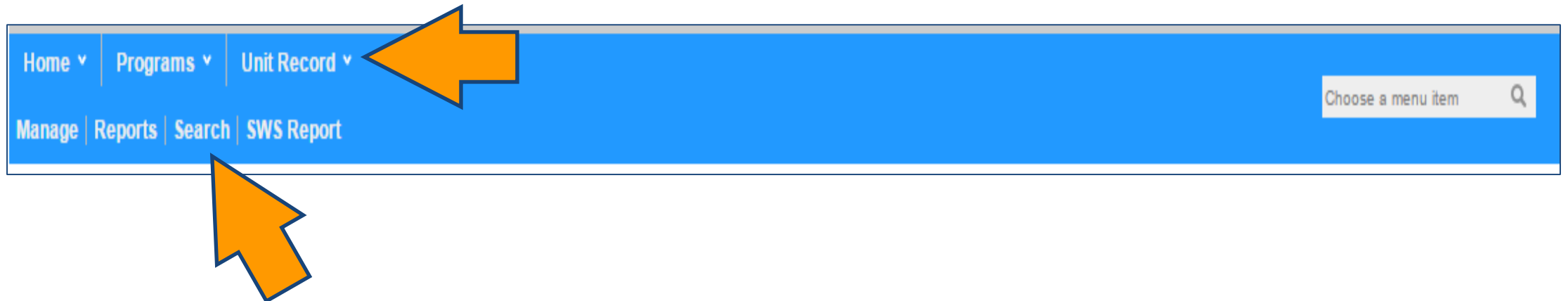
State Need Grant   College Bound Scholarship   **Passport To College**   Missing SNG Unserved Students

<u>SSN</u>	<u>Last, First</u>	<u>SID</u>	<u>WSAC Passport</u>	<u>Unit Record</u>	<u>Difference</u>	<u>Override Requested</u>
444-44-4445	Actor, Shakespeare J			<u>\$3,000.00</u>	\$3,000.00	Y
101-11-1111	Adrenaline, Rush A			<u>\$1,500.00</u>	\$1,500.00	



# Edit to Correct or Add Data to an Existing URR Record

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





# Add a Missing Record to the URR Upload

To add a missing student record, click “Add a new unit record to the report” from the Edits page.

Last processed on 6/26/2018 1:47:50 PM [download all edits into csv](#) [Reprocess Edits](#) [Delete Upload](#) [Add a new unit record to the report](#)

**Unit Record Edits**  
9 errors (9 overrideable - 9 overridden; 0 informational) Filter by Edit Type Show Informational  Overridden

All edits have been addressed [Click To Continue](#) →

Showing results 1 - 9 of 9 [Show SNG/CBS/PTC differences report](#)

<a href="#">SSN</a>	<a href="#">Student ID</a>	<a href="#">Last</a>	<a href="#">First</a>	<a href="#">Middle</a>	<a href="#">Error</a>	<a href="#">Overrideable</a>
<a href="#">101111111</a>		Adrenaline	Rush	A	State Need Grant Amount Differs From CSAW (CSAW: 0; unit record: 659)	Overridden



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

This will open a new, blank record. Complete the fields in the “Student Demographics and Need” and “Student Aid” tabs. Remember to “Save” your work.

The screenshot shows a web form titled "New Unit Record" with two tabs: "Student Demographics and Need" (active) and "Student Aid". The form contains several input fields and dropdown menus. Three orange arrows point to the "Student Demographics and Need" tab, the "Student Aid" tab, and the "Save" button at the bottom right.

Student Demographics and Need		
SSN	Institution Student Id	Marital Status: Unknown (blank)
Last Name	First Name	Middle Name
Date of Birth: mm/dd/yyyy	Is Dependent: Unknown / blank	Year in School
Gender: Unknown (blank)	Family Size	# Family in College
Is State Resident: Unknown / blank		

Need	
+ Cost of Attendance	Total Family Income
- Expected Family Contribution	Need Duration (months)
= Need Amount	

Ethnicity/Race	
Is of Hispanic Origin: Unknown / blank	Is Native Hawaiian/Pacific Islander: Unknown / blank
Is Asian: Unknown / blank	Is White: Unknown / blank
Is Black/African American: Unknown / blank	Is Other Race: Unknown / blank
Is American Indian Alaska Native: Unknown / blank	

Navigation buttons: <<Prev, Next>>, Save



# Student Aid Screen

All aid must be reported by term. If the term is not applicable, report “Not enrolled” and ‘0’ funding (typically).

	Summer 1	Fall	Winter	Spring	Summer 2
Enrollment Status	Not enrolled ▾	Not enrolled ▾	Not enrolled ▾	Not enrolled ▾	Not enrolled ▾

- Federal**
- Federal Pell Grant
- Federal SEOG
- Federal Work Study
- Federal Perkins Loan
- Federal Nursing Health Loans
- Federal Nursing Scholarships
- Federal Subsidized Stafford Loans
- Federal Unsubsidized Stafford Loans
- Federal TEACH Grant
- Federal Grad PLUS Loans
- Federal Parent PLUS Loans

- State**
- State Need Grant
- Opportunity Scholarship
- WorkForce Training Funds
- SBCTC Opportunity Grant
- Passport to College Scholarship
- College Bound Scholarship
- Other State Funded Gift Assistance
- On Campus State Work Study
- Off Campus State Work Study
- GET Ready for Math Science

- Institution / Other**
- Outside Scholarships
- Need Based Institutional Gift Aid
- Non-Need Based Institutional Gift Aid
- Institutional Employment
- Other Agency Assistance
- Other Loans
- Conditional Loans
- Private Loans
- Institutional Loans



# Missing SNG Unserved Students Report

Review the SNG, CBS & Passport differences below, then

[Click to Continue](#) →

[Return to the Edit List](#)

Edit or add student records if necessary. A 'Y' in the Override column denotes an addressed edit. You may be asked to explain significant discrepancies before your report is finalized by WSAC.  
Discrepancies due to an SSN mismatch, originating in the Final Interim Report or Portal records instead of the URR, cannot be corrected by the institution without WSAC assistance. Click on the "Send an Email" button to correct the SSN: [Send an Email](#)

- State Need Grant
- College Bound Scholarship
- Passport To College
- Missing SNG Unserved Students** ←

Download the .csv file and review for accuracy as described here, then return the annotated .csv file to WSAC URR team as a secure Portal email attachment, using the "Send an Email" button in the upper half of this screen.

For any students who received need-based aid or federal loan assistance, click "Return to the Edit List" and manually add unit records for those students; then run an updated .csv, to remove them from the Missing Unserved list.

For students whose term enrollment statuses ALL are accurate as shown AND no need-based aid or federal loan assistance was received, enter "Yes" in the "Indicate Yes If All Terms OK" column. For remaining students, enter the actual enrollment status (i.e., Full time; 3/4 time; Half time; LTHT; or, Not enrolled) in the "Verify" column corresponding only to the positive enrollment terms shown. Leave blank the "Verify" column corresponding to a term shown as "Not enrolled." Do not overwrite or edit the original download text. Additional notes may be placed in the "Comments" column.

[Download unserveds to csv](#) ←

SSN	Last, First	SID	Unserved Summer1	Unserved Fall	Unserved Winter	Unserved Spring	Unserved Summer2
██████	██████			Half time		Half time	Half time
██████	██████			Full time		Full time	



# Example of Missing SNG Unserved Report

## Example: Missing SNG Unserved CSV report on download

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	InstitutionName	Academic Year	Ssn	SID	FirstName	MiddleInitial	LastName	Indicate_Yes_if_All_Terms_OK	Summer1UnservedEnrollment	Summer1VerifyOrChange	FallUnservedEnrollment	FallVerifyOrChange	WinterUnservedEnrollment	WinterVerifyOrChange	SpringUnservedEnrollment	SpringVerifyOrChange	Summer2UnservedEnrollment	Summer2VerifyOrChange	Comments_Section
2	Example University	2017-2018	XXXXX1111	STU001	Aaron	N	Andrews		Not enrolled		Full time		Full time		Not enrolled		Not enrolled		
3	Example University	2017-2018	XXXXX2222	STU002	Betty	C	Bradley		Not enrolled		Not enrolled		Not enrolled		Full time		Full time		
4	Example University	2017-2018	XXXXX3333	STU003	Cathy	R	Calhoun		Not enrolled		Not enrolled		Not enrolled		Full time		Full time		
5	Example University	2017-2018	XXXXX4444	STU004	Dean	A	Dandy		Not enrolled		Not enrolled		Full time		Full time		Not enrolled		
6	Example University	2017-2018	XXXXX5555	STU005	Ella	L	Emerson		Not enrolled		Full time		Not enrolled		Not enrolled		Not enrolled		
7	Example University	2017-2018	XXXXX6666	STU006	Fiona	M	Friendly		Not enrolled		Not enrolled		Not enrolled		Full time		Not enrolled		
8	Example University	2017-2018	XXXXX7777	STU007	Greta	V	Grandy		Not enrolled		Not enrolled		Full time		Full time		Full time		

## Example: Completed Missing SNG Unserved CSV download report with annotations

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	InstitutionName	Academic Year	Ssn	SID	FirstName	MiddleInitial	LastName	Indicate_Yes_if_All_Terms_OK	Summer1UnservedEnrollment	Summer1VerifyOrChange	FallUnservedEnrollment	FallVerifyOrChange	WinterUnservedEnrollment	WinterVerifyOrChange	SpringUnservedEnrollment	SpringVerifyOrChange	Summer2UnservedEnrollment	Summer2VerifyOrChange	Comments_Section
2	Example University	2017-2018	XXXXX1111	STU001	Aaron	N	Andrews		Not enrolled		Full time	< Half time	Full time	Half time	Not enrolled	Full time	Not enrolled		
3	Example University	2017-2018	XXXXX2222	STU002	Betty	C	Bradley	Yes	Not enrolled		Not enrolled		Not enrolled		Full time		Full time		
4	Example University	2017-2018	XXXXX3333	STU003	Cathy	R	Calhoun		Not enrolled		Not enrolled		Not enrolled		Full time	Not enrolled	Full time	Not enrolled	
5	Example University	2017-2018	XXXXX4444	STU004	Dean	A	Dandy	Yes	Not enrolled		Not enrolled		Full time		Full time		Not enrolled		
6	Example University	2017-2018	XXXXX5555	STU005	Ella	L	Emerson		Not enrolled		Full time		Not enrolled	Full time	Not enrolled		Not enrolled		
7	Example University	2017-2018	XXXXX6666	STU006	Fiona	M	Friendly		Not enrolled		Not enrolled		Not enrolled		Full time	Half time	Not enrolled		
8	Example University	2017-2018	XXXXX7777	STU007	Greta	V	Grandy		Not enrolled	Half time	Not enrolled		Full time	Not enrolled	Full time	3/4 time	Full time	Full time	
9	Example University	2017-2018	XXXXX8888	STU008	Hettie	A	Harmon		Not enrolled		Full time	3/4 time	Full time	3/4 time	Full time	Not enrolled	Not enrolled		
10	Example University	2017-2018	XXXXX9999	STU009	India	L	Indigo		Not enrolled		Full time		Not enrolled		Full time	Not enrolled	Full time	< Half time	
11	Example University	2017-2018	XXXXX0000	STU000	James	C	Jameson		Not enrolled		3/4 time	Half time	Not enrolled		3/4 time	3/4 time	Not enrolled		





# Return completed “Missing SNG Unserved” Report as a secure Portal email attachment

Review the SNG, CBS & Passport differences below, then

[Click to Continue](#) →

[Return to the Edit List](#)

Edit or add student records if necessary. A 'Y' in the Override column denotes an addressed edit. You may be asked to explain significant discrepancies before your report is finalized by WSAC.

Discrepancies due to an SSN mismatch, originating in the Final Interim Report or Portal records instead of the URR, cannot be corrected by the institution without WSAC assistance. Click on the "Send an Email" button to correct the SSN: [Send an Email](#)



State Need Grant

College Bound Scholarship

Passport To College

**Missing SNG Unserved Students**

Download the .csv file and review for accuracy as described here, then return the annotated .csv file to WSAC URR team as a secure Portal email attachment, using the "Send an Email" button in the upper half of this screen.

For any students who received need-based aid or federal loan assistance, click "Return to the Edit List" and manually add unit records for those students; then run an updated .csv, to remove them from the Missing Unserved list.

For students whose term enrollment statuses ALL are accurate as shown AND no need-based aid or federal loan assistance was received, enter "Yes" in the "Indicate Yes If All Terms OK" column. For remaining students, enter the actual enrollment status (i.e., Full time; 3/4 time; Half time; LHTT; or, Not enrolled) in the "Verify" column corresponding only to the positive enrollment terms shown. Leave blank the "Verify" column corresponding to a term shown as "Not enrolled." Do not overwrite or edit the original download text. Additional notes may be placed in the "Comments" column.

[Download unserveds to csv](#)

SSN	Last, First	SID	Unserved Summer1	Unserved Fall	Unserved Winter	Unserved Spring	Unserved Summer2
██████	██████			Half time		Half time	Half time
██████	██████			Full time		Full time	



# Submitting the Report

**SSN Mismatches:** Note that SSN mismatches originating outside of URR require WSAC assistance to correct. Press “Send an Email” to securely notify WSAC.

Press “Return to the Edit List” or “Search” to make additional corrections, or “Click to Continue” if all errors have been fixed or overridden.

Review the SNG, CBS & Passport differences below, then [Click to Continue](#) → [Return to the Edit List](#)

Edit or add student records if necessary. A 'Y' in the Override column denotes an addressed edit. You may be asked to explain significant discrepancies before your report is finalized by WSAC.

Discrepancies due to an SSN mismatch, originating in the Final Interim Report or Portal records instead of the URR, cannot be corrected by the institution without WSAC assistance. Click on the "Send an Email" button to correct the SSN: [Send an Email](#)

State Need Grant | College Bound Scholarship | [Report To College](#) | Missing SNG Unserved Students



# Submitting the Report

- Review the preliminary Program Totals Report for missing information or unusual patterns.
- Press “Click to Continue” if data appear to be correct.

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

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

Uploaded by  on 6/15/2018

[Create a PDF of this page for your records](#)

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

Financial Aid Type	2014-2015 Amount	2015-2016 Amount	2016-2017 Amount	2017-2018 Amount	%Change Current vs Previous	2014-2015 Recipients	2015-2016 Recipients	2016-2017 Recipients	2017-2018 Recipients	% Change Current vs Previous
Federal										



# Submitting the Report

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. Notify institutions when the 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.

[SNG, College Bound & Passport Differences](#)

Show differences between Unit Record data and WSAC Payments and/or Interim Reporting.

**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 2019. To view previous year comparison reports, select a previous year from the options shown above..

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

The page at portaltraining says:

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

OK

Cancel



# Before Exiting the URR Portal

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

Unit Record Report -- Submitted 2017-2018 Institution name here Submitted

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

Uploaded	User name	6/15/2018
Submitted	here	6/15/2018

For questions or to unsubmit your Unit Record Report, contact the WSAC Unit Record staff at [UnitRecord@wsac.wa.gov](mailto: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.
- [SNG, College Bound & Passport Differences](#) Show differences between Unit Record data and WSAC Payments and/or Interim Reporting.

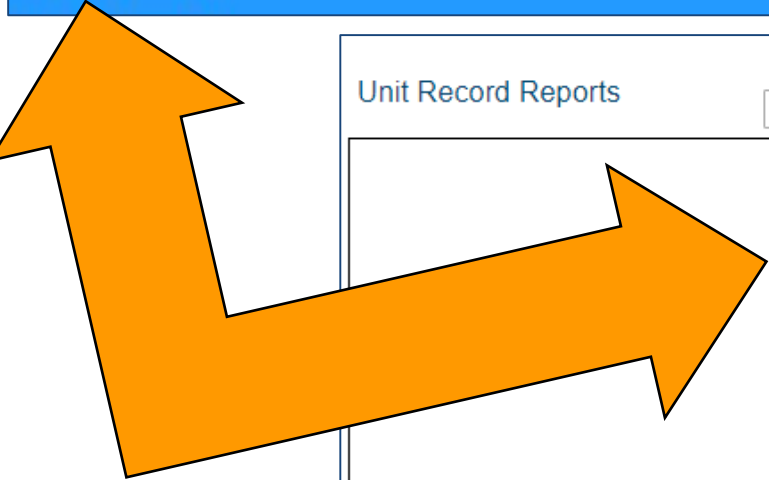
**Profile Reports** - These reports allow your institution to compare the assistance your students have received from these programs to all institutions in Washington state and also to all institutions in your institutions sector. The comparison reports for this year will be available in January 2019. To view previous year comparison reports, select a previous year from the options shown above..

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

*WSAC Secure Portal*  
Welcome (Portal user)  
[Logout](#)



# Other URR Summary Reports



Home ▾ | Programs ▾ | Unit Record ▾

Reports | Search

Choose a menu item 🔍

Unit Record Reports (Name of Institution here) Submitted

2017-2018

**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.
- [SNG, College Bound & Passport Differences](#) Show differences between Unit Record data and WSAC Payments and/or Interim Reporting.

**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 2019. To view previous year comparison reports, select a previous year from the options shown above..*

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

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

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

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

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



# Where to go for help – WSAC URR Portal Issues

- Review the 2017-18 URR Manual, available online at:  
<http://www.wsac.wa.gov/unit-record>
- Contact Washington Student Achievement Council staff at:  
[unitrecord@wsac.wa.gov](mailto:unitrecord@wsac.wa.gov)

<b>Ann Voyles</b>	<b>Carla Idohl-Corwin</b>	<b>Marla Skelley</b>
360-753-7843	360-753-7847	360-753-7851
<a href="mailto:annv@wsac.wa.gov"><u>annv@wsac.wa.gov</u></a>	<a href="mailto:carlai@wsac.wa.gov"><u>carlai@wsac.wa.gov</u></a>	<a href="mailto:marlas@wsac.wa.gov"><u>marlas@wsac.wa.gov</u></a>