

Unit Record Report 3.0

Submitting the 2021-22 Report

Training Webinar Presentation July 19, 2022





Marla Skelley, Associate Director for Compliance, WSAC

Ann Voyles, Program Associate, WSAC





- 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



• URR Manual available electronically:

https://www.wsac.wa.gov/unit-record

- July 2022: PortalTraining website open for test files
- August 8: Unit Record Report (URR) application opens
- October 10: Finalized report due
- October/November: WSAC analysis
- **December:** Reports to policy makers
- January 2023: Institutional profiles available



Introduction

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



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



- Building a CSV file for submission
 - Report only students who received financial aid based on the 2021-22 FAFSA or WASFA year.
 - Report files in updated CSV layout 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.



- Determine which students to report
 - Need-Based Recipients 2021-22 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



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 2021-22 FAFSA or WASFA.
- Report on next year's URR all financial aid received based on the 2022-23 FAFSA or WASFA.



Need-Based Recipients – FAFSA fields required

- Federal Pell Grant
- □ Federal SEOG
- Federal Work Study
- Federal Direct Subsidized Loan
- Washington College Grant*
- College Bound Scholarship*
- Passport to College Scholarship*
 - * FAFSA or WASFA required

- □ State Work Study (On- and Off-Campus)**
- National Guard Grant*
- Alternative Routes to Teaching*
- Pipeline for Paraeducators*
- Teacher Shortage Conditional Grant *
- Student Teaching Grant *
- arship* 🛛 Need-Based Institutional Gift Aid
- ** FAFSA or WASFA required; DACA students must have a valid work authorization



Need-Based Recipients – Other Programs

- Federal TEACH Grant
- Federal Health Professional Scholarships & Grants
- Federal Health Professional Loans
- WSOS BA Scholarship (former Opportunity Scholarship)
- WSOS Career Tech Scholarship

- WSOS Graduate Scholarship
- Other State Funded Assistance
- Worker Retraining Program Funds
- Need-Based Institutional Gift Aid
- Institutional Employment (if need based)



• Federal Non-Need Based Loan Recipients

- Federal Direct Unsubsidized Loan
- Federal Parent PLUS Loan
- Federal Grad PLUS Loan

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

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



- 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



Changes for the 2021-22 Unit Record Report Portal, 1 of 3

• Reporting Category Updates:

 VA Benefits – Report only Veterans waivers or benefit programs that reduce the student's cost of attendance (COA).
 Do not report Veterans programs that do not affect the need calculation (for example, Chapters 31 and 33).



Changes for the 2021-22 Unit Record Report Portal, $_{\rm 2}$ $_{\rm of \, 3}$

- New Field Additions to the .CSV Header File Record Layout
 - IsDelete
 - WSOSGradScholarship



Changes for the 2021-22 Unit Record Report Portal, ^{3 of 3}

- Functional improvements to the URR application
 - Bulk overrides may be applied to similar errors in multiple records
 - Supplemental file uploads to add/delete/edit multiple records
 - Automatic addition of records not in URR that exist in WSAC applications
 - Comparison of URR data to ISIR/WASFA and WSAC applications
 - Ability to add Notes to the URR for WSAC's review at submission
- Refer to Page iii in the Manual for additional details



Early Announcement: Changes for the 2022-23 Unit Record Report Portal

• Reactivation of the Washington Award for Vocational Excellence (WAVE) program beginning 2022-23.

• Potential for addition of new state-funded aid programs enacted by the Legislature. Specific details will be announced as soon as available.



Category	Old Value	New Value
Pell Grant	0 to 9518	0 to 9743
National Guard Grant	0 to 11540	0 to 11839
WSOS Graduate Scholarship	n/a	0 to 18500



- For all financial aid recipients reported
 - 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
 - Required fields:
 - SSN
 - First Name
 - Last Name
 - Gender
 - Is State Resident

- Year In School
- Rejected ISIR WASFA
- Enrollment Status per term
- Financial Aid per term even if '0'



- .CSV file requires header row (revised 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)
 - Clock hour schools may have awards for all 5 terms



• When to include summer aid in your reporting

- Review Chapter 2 of Manual for detailed information.
- Summer aid reported are amounts received based on 2021-22 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.



• Fields to also report for 2021-22 FAFSA & WASFA filers

- ISIR/WASFA Transaction #
- Rejected ISIR/WASFA
- 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





- Duplicates are not accepted. Files containing duplicate SSNs will not upload.
- Invalid SSN sequences are flagged. Don't use "dummy" numbers.
- SSNs of WCG, CBS, and Passport to College recipients will be compared to WSAC CSAW records.
- SSNs of recipients of other WSAC applications (Teacher and National Guard programs) will be compared to WSAC records.
- Discrepancies will show on error reports.
- Guidance for resolution of SSN issues included in the URR manual.



'1'	or	'Fres	hman	/1 <t `<="" th=""><th>Year'</th></t>	Year'
	U	1162	iiiiiaii/		IEUI

'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 2021-22 year.



- 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.



• 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
 - If married, must be 2 or higher
- Number in College
 - Must be 1 or higher
 - Cannot exceed the Family Size
 - Parents' enrollment in college should not be included unless it is a professional judgment decision



- Report the Family Income (taxable and untaxed) based on a review of the 2021-22 FAFSA or WASFA
 - Generally, will be the 2019 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.
 - * These data elements should align across URR, CSAW, and, generally, FAFSA/WASFA.
 - ** Ensure changes are submitted through federal processor or WASFA, and update CSAW record.



• Report the Expected Family Contribution (EFC)

- Use the Federal Methodology (FM) calculation produced by U.S.
 Department of Education based on the 2021-22 FAFSA, or 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.

*These data elements should align across URR and FAFSA/WASFA unless adjusted for Need Duration less than or greater than nine-month regular academic year.



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



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).



- 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.



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 – unless a student is out of QER



Approximate Term Date Ranges for Clock-Hour Institutions

Term	From	То
Summer 1	July 1, 2021	September 11, 2021
Fall	September 12, 2021	November 22, 2021
Winter	November 23, 2021	February 5, 2022
Spring	February 6, 2022	April 18, 2022
Summer 2	April 19, 2022	June 30, 2022



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

- Report the final awards and enrollment levels of student at time of disbursement.
- The Unit Record Reporting tool checks against CSAW records.
- Review the "WCG, CBS, & Passport Differences Report" to verify all recipients and awards are correctly reported.



Reporting of tuition waiver dollars for WCG and CBS recipients

- Required for 2021-22
 - 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


- 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.



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 2021-22 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).



Report sources of state aid not reported elsewhere.

Examples include:

- American Indian Endowed Scholarship
- Early Achievers Opportunity Grant
- Global Opportunity Grant (UW only)
- Gold Star Book Stipend
- Student Emergency Assistance Grant (SEAG)
- Supporting Students Experiencing Homelessness (SSEH) Pilot
- Washington Award for Vocational Excellence (WAVE)
- Washington Scholars

EDITS

Washington Student Achievement Council





- 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.



Refer to Appendix C (page 80) in the Manual

Examples of errors that prevent upload:

- Header row missing or invalid
- Duplicate SSNs
- Invalid codes
- Blanks reported in required fields
 - RejectedISIRWASFA is a required field
- Be sure to review all 12 items!



- Refer to Appendix C (pages 80-83) in the Manual
 - Non-resident with WCG or other state aid
 - Number in College is greater than Family Size
 - No Valid Institutional SWS Allocation in Portal



- Refer to Appendix C (pages 80-83) Field Content
 - Need Amount is Zero with Need Based Aid. Example: Budget changed with dropped credits
 - Year in School for Aid Type (Federal Grad PLUS Loan).

Student graduated mid-year, changed to graduate status the following term

- Cost of Attendance minus Expected Family Contribution (calculated by the edit program) does not equal Need Amount reported by college.
- Date of Birth outside normal range is now an Informational message only.



- Keep Override comment(s) brief, but with sufficient detail to directly explain the edit response.
- Report Family Income using WCG income calculation, not federal Total Income field from FAFSA without appropriate adjustments. Income reported in CSAW for 2021-22 should reflect the WCG income calculation.
- The ISIR/WASFA transaction number reported should be the most recent used to award the student, not necessarily the last one filed. This is used to compare FAFSA/WASFA to URR and CSAW for discrepancies related to Family Income, Family Size, Number in College, or Expected Family Contribution. Comparison now appears as a tab in URR student record.



- Report an adjusted Expected Family Contribution according to Need Duration if student attended less than full time/full year if your standard practice is to do so. If one element adjusted, must adjust all. EFC, Need, COA and Need Duration must all be consistently aligned.
- Report all known Race categories for each student, even where Hispanic Origin is marked 'Y' (this eliminates gaps in research data).



- Upload your CSV file early don't wait for the deadline!
- Review WSAC's 2021-22 URR Manual and training materials, and test upload using the Portal training environment:

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

(Data entered is temporary; information clears overnight)

- Use URR informational reports to check for consistency & validity.
- CTCs Review SBCTC 2021-22 URR Processing Guide(s) when available.
- Contact WSAC with questions or issues not addressed in WSAC's URR Manual.

USING THE WEB APPLICATION

Washington Student Achievement Council









Login screen 1:

ASHINGTON STUD
Portal Login
Email
Password
Forgot your password?
Login
Need help?

Login screen 2:

Please log in to continue
Please enter the 6-digit access code sent to Authentication Code
Remember this browser
Verify code
If your code did not arrive, resend code using one of the following:
voice call to
send text to '
☑ send email to annv@*****.wa.gov
I have an access code

Portal "My Account" screen:

My WSAC portal account

Login
Email
✓ update
This email is used to sign in, and can be used to verify your account.
Phone
Not configured 🖉 update
This phone number can be used to verify your account via automated call or text message.
Remember this browser
Change password Connect authenticator app
Personal Information
Depending on how your account was created, some personal information may be pre- filled from different data sources, such as FAFSA applications or forms filled out on the WSAC portal. You are welcome to update inaccurate or outdated information.
Name
✓ update
Pronouns
None 🖉 update



In the Programs menu, click on Unit Record.





• The Welcome/Upload screen will appear, with Navigation bar tracking progress.

 Browse your file directory to select the CSV file for upload

• Click the blue "Start Upload" button

 Welcome to Unit Record 3.0!

 Training information will be coming soon. Updates include:

 • Faster uploads and error processing

 • Bulk override capabilities

 • A more modern look and feel

 • A comparison chart between the Unit Record Report, the student's FAFSA/WASFA, and data reported in other applications (i.e. CSAW)

 If 2
 2743 - Test school
 2021-2022

 Add a Note or Send us an Email

 Upload

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

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

Download the template here.

Choose File Browse Start Upload Create Record Manually



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



Download the Error file to review errors, then discard the upload file. After correcting error(s) in the upload file, attempt file upload again.



Upon successful upload of the file, verify accuracy of the student number by year in school and total student records.

If the data is good, click "Continue."

		🗘 Add a Note	or 🖂 S	end us an Email
Upload 🗸	Errors	Review	\geq	Submit
Successfully Upload	ded 🗸			
Search Students		Ad	d File	Add Record
tudents reported to date:	0			
Year in School			Count	
Freshman/1st Year			2	
Sophomore/2nd Year			2	
Junior/3rd Year			2	
Senior/4th Year			2	
Graduate			1	
Other			1	
Total			10	
I	Discard Upload	Download	d Report	Continue



- View of Main Error screen
- Dropdown selection of viewable records per screen (5, 10, 20, 50, 100, 1000)
- Hover cursor over Error message to view full text

	SSN ¢	Student ID ¢	Name *	Error (hover over the error to see the full text) \$	Overrideable
0	900000011		A, Student	Student Id Number must be provided by public schools - the f	Overrideable
0	900000011			^	verrideable
	900000012	s	tudent id Numi	ber must be provided by public schools - the first 9 characters must be the PCHEES Id	verrideable

			Upload		Errors		Review	>	Submit			
Jn 6 e	it Record	Errors rideable - 0 must f	ix - 0 overridde	n - 0 infor	rmational) 🗿					Add	d Record	Revalidate
0	verride Reaso	n										
	Override Rea	son										
1	Override 0 e	rrors Delete	0 overrides									
ST	tatus:	All	~									
Er	rror Type:	View	All Error Types						~	\sim		
bar	ch: Search	errors by all fields			Page	1 c	f3 >	Show	v 10 🗸	A Dov	vnload 26 F	lesults to CS
3	SSN ¢	Student ID \$	Name *	Error (h	nover over the	error to	see the ful	vt) :			Over	ideable 🗘
2	900000011		A, Student	Student	Id Number mu	ist be pro	ovided by pu	blic sch	ools - the f		Overr	ideable
5	900000011		A, Student	Summer	1 term Enrollm	nent Stati	us cannot be	Not En	rolled when S.	8	Overr	ideable
3	900000012		B, Student	Student	Id Number mu	st be pro	wided by pu	blic sch	ools - the f		Overr	ideable
5	90000013		C, Student	Student	Id Number mu	st be pro	wided by pu	blic sch	ools - the f		Overr	ideable
0	900000014		D, Student	Cost Of /	Attendance mi	inus EFC	does not eq	ual Need	ł		Overr	ideable
)	900000014		D, Student	Student	Id Number mu	st be pro	wided by pu	iblic sch	ools - the f		Overr	ideable
2	900000015		E, Student	Need An	mount cannot e	exceed C	ost of Atten	dance			Overr	ideable
5	900000015		E, Student	Cost Of J	Attendance mi	nus EFC	does not eq	ual Need	đ		Overr	ideable
			tudent	Student	Id Number mu	ist be pro	wided by pu	blic sch	ools - the f		Overr	ideable
	0	verrideable \$	tudent	Cost Of J	Attendance mi	nus EFC	does not eq	ual Need	ł		Overr	ideable
	0	verrideable										



Sort by column headers, or Filter by

Status or Error Type.

By	status:
----	---------



By Error Type:

Error	Type:	View All Error Types 🗸
		- Select -
		View All Error Types
Search:	Search errors by all	Need Amount cannot exceed Cost of Attendance
		Total aid reported is zero
o ss	N © Student	Cost Of Attendance minus EFC does not equal Need Student Id Number must be provided by publics
0 90	0000011	Passport To College Amount Differs From CSAW
0 90	0000011	Summer1 term Enrollment Status cannot be Not Enrolled when Summer1 term aid I Passport recipient not independent

		Upload	Errors Review	Submit	0
nit Record errors (26 over	1 Errors rrideable - 0 must fi	x - 0 overridde	n - 0 informational) 0		Add Record Revalidate
Override Reaso	on				
Override Rea	ison				
Override 0 e Status: Error Type:	All View A	O overrides		~	
rch: Search	errors by all fields		Page 1 of 3 Sho	w 10 👻	A Download 26 Results to CSV
SSN ¢	Student ID 0	Name *	Error (hover over the error to see the full text)	٠	Overrideable 单
900000011		A, Studens	south to nomber mast be provided by paone so	oors - the I	Overrideable
900000011		A, Student	Summer1 term Enrollment Status cannot be Not Er	rolled when S.,	Overrideable



• To view full error text, hover cursor over error message.

0	SSN ¢	Student ID	Name *	Error (hover over the error to see the full text) \$	Overrideable \$
0	900000011		A, Student	Student Id Number must be provided by public schools - the f.,	Overrideable
0	900000011				verrideable
	900000012		Student Id Num	er must be provided by public schools - the first 9 characters must be the PCHEES Id	verrideable

- "Must Fix" (Non-Overrideable) errors must be corrected.
- Overrideable errors must be corrected, or an override reason provided.
- To open and edit the student record, click student's SSN.





Editing Student Records, 1 of 7

- Student Record "Errors" Tab
- Navigate record by clicking tab headings
- SSNs have no "click" function while in the student record
- Error list downloadable
- Process overrides in this screen or main Error screen

Student A (90000	00011)		Delete 🔍 . Sa
Details Terms C	On File Errors (2 err	rors)	
Override Reason			
Override Reason			
Override 0 errors	Delete 0 overrides		
Status:	All		
Status: Error Type:	All View All Error Types	~	
Status: Error Type: Search: Search errors by	All View All Error Types y all fields	✓ Page 1 of 1 > Show 10 ✓ ▲	Download 2 Results to C
Status: Error Type: Search: Search errors by	All View All Error Types y all fields nt ID Name	Page 1 of 1 > Show 10 Show 10 Error (hover over the error to see the full text)	Download 2 Results to 0 Overrideable
Status: Error Type: Search: Search errors by	All View All Error Types y all fields nt ID A, Student S	Page 1 of 1 > Show 10 Show 10 Show 10 Show 10 Student Id Number must be provided by public schools - the f	Download 2 Results to C Overrideable Overrideable

- Enter corrections in Details and Terms tabs. Resolved errors disappear from list.
- Save all work by clicking blue "Save" button in upper corner before exiting record



Editing Student Records, 2 of 7

- Student "Detail" tab
 - Student information
 - Ethnicity data
 - ISIR WASFA transaction # and status (Rejected status)
 - Student ID and Year in School
 - Student budget and family information
- Edit directly in data field(s)

	Return to List		
rors (2 errors)			
	ISIR WASFA & School Info	ormation	
Student	Transaction number	1	
Middle name	Rejected	No 🗸	
A	Student id	Student id Freshman/1st Year 🗸	
900000011	Year in school		
06/21/2002	Need		
Female 🗸	Family income	30000	
Yes 👻	Duration (months)	6	
	COA ()	20000	
Yes 🗸	EFC 0	0	
No 🗸	Need amount ()	20000	
No 🛩	Family Information		
No	Family size	2	
No 🗸	Number in college	1	
No 🛩	Is dependent	No	
	Student Middle name A 900000011 06/21/2002 Female Yes Yes No No	Student ISIR WASFA & School Infe Middle name Rejected A Student id 900000011 Vear in school • 06/21/2002 Need Female Family income Ves Duration (months) COA • EFC • No Need amount • No Family Information No Number in college No Is dependent	



- Student "Terms" tab, abbreviated view
 - Click "Show All" box to view full programs list for editing
 - Click unclick "Show All", click/unclick lock icon to "lock" and "unlock" list view

udent A (90	0000011)	≪ Prev N	ext 🍽 🛛 Return to L	ist	Delete 9	Save
Details Terms	On File Errors (2 e	rrors)				
Show All	Summer 1	Fall	Winter	Spring	Summer 2	Total
Enrollment Status	Not enrolled 🗸	Not enrolled 🗸	Not enrolled 🗸	Not enrolled 🗸	Not enrolled 🗸	
State						
	1000	0	0	0	0	1,000
WA College Grant						

• Enter changes directly in data field(s)



- Editing Student Records, 4 of 7
- Student "On File" tab
- Comparison of student URR data, WSAC data, and ISIR/WASFA
- Green check shows data match
- Red "X" indicates data mismatch needs addressing

Student A (900	0000011)		≪Prev Next >> Return to List	Delete 🔍 Save
Details Terms	On File	Errors (2 errors)		
		Program Data	Unit Record	ISIR/WASFA
Family Income		\$30,000	\$30,000	~
Family Size		2	2	~
Number In College		1	1	~
EFC 0			SO	~
WCG		\$1,000	\$1,000	~
CBS		\$0	SO	~
PTC		\$0	SO	~
PTC - Incentive		\$0	so	~
Teacher Shortage			so	~
Paraeducator			so	~
ALT			SO	~
STG			so	~
National Guard			\$0	~



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

- Click error box to be fixed
- Enter Override reason above
- Click Override Errors box
- Click Save
- Red "Overrideable" text will turn into green text





• Quickly view Override reason entered by hovering cursor over blue icon next to "Overridden" message.



• To view Override reason as part of the Errors list, click the green "Overridden" text, and the comment will appear below the Error message..





- Override comments cannot be edited but can be deleted and replaced with an updated Override reason.
- To delete an Override, select the Error box
- Click the gray "Delete Overrides" button, then "Confirm Delete"



Washington Student Achievement Council

Override Reason				
Override 0 error	s Delete 1 overrides			
Status:	All			
Error Type:	View All Error Types	ſ	~	
		Page 1 of 1	Show 10 V	ownload 2 Results to CS ¹
arch: Search	rs by all fields	Fage 1 Of 1	Show to	
arch: Search SSN St	udent ID 🗘 Name ^	Error (hover over the error to see	the full text) \$	Overrideable 🗘



Address any SSN Mismatches. If the incorrect SSN originates outside of URR (in CSAW, for example), WSAC assistance is required to correct it. Click "Send us an Email" and securely notify WSAC to initiate correction.



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



• From the Institution Main Errors screen, select the Error Type from the dropdown box. Most student records Errors unduplicated.

OW	erride Reason		
C	verride Reason		
4	Override 0 errors	velete 0 overrides	
Sta	tus:	All Y	
Erro	or Type:	View All Error Types 🗸	
		— Select —	
Search	n: Search errors by al	View All Error Types Need Amount cannot exceed Cost of Attendance	oad 26 Results to CSV
0 :	SSN © Student	Total aid reported is zero Cost Of Attendance minus EFC does not equal Need Student Id Number must be provided by publics	Overrideable \$
0	900000011	Passport To College Amount Differs From CSAW	Overrideable
0	900000011	Passport recipient not independent	Overrideable
0	900000012	B, Student Id Number must be provided by public schools - the f	Overrideable
0	900000013	C, Student Id Number must be provided by public schools - the f	Overrideable



"Bulk" Override Processing, 2 of 2

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

-			C		
T	his is an exam	ple of the bulk over	ride comment fo	r COA-EFC does not equal Need	
	Override 7 erro	Delete 0 ov	errides		
Sta	tus:	All	~		
Erro	or Type:	Cost Of A	ttendance minu:	s EFC does not equal Need	
arcr	search en	rors by all fields		< Page 1 of 1 > Show 50 V	Download 7 Results to 0
arch	SSN \$	student ID \$	Name *	Page 1 of 1 > Show 50 ~ Error (hover over the error to see the full text) \$	& Download 7 Results to 0 Overrideable \$
arch	SSN \$	Student ID \$	Name * D, Student	Page 1 of 1 > Show 50 Show 50 Cost Of Attendance minus EFC does not equal Need	Download 7 Results to 0 Overrideable Overrideable
arcr	ssn ¢	Student ID \$	Name * D, Student E, Student	Page 1 of 1 > Show 50 Error (hover over the error to see the full text) Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need	Download 7 Results to 0 Overrideable Overrideable Overrideable
arcr	ssn ≎	student ID \$	Name ^ D, Student E, Student F, Student	Page 1 of 1 > Show 50 Error (hover over the error to see the full text) Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need	Download 7 Results to Overrideable Overrideable Overrideable Overrideable Overrideable
arcr	SSN ¢	student ID \$	Name * D, Student E, Student F, Student G, Student	Page 1 of 1 > Show 50 Fror (hover over the error to see the full text) Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need	Download 7 Results to 0 Overrideable Overrideable Overrideable Overrideable Overrideable Overrideable
arch	SSN \$	student ID \$	Name * D, Student E, Student F, Student G, Student H, Student	Page 1 of 1 > Show 50 Error (hover over the error to see the full text) Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need	Download 7 Results to 0 Overrideable Overrideable Overrideable Overrideable Overrideable Overrideable Overrideable Overrideable
	SSN ¢ 90000001 900000018 900000019	student ID \$	Name * D, Student E, Student F, Student G, Student H, Student I, Student	Page 1 of 1 > Show 50 Frror (hover over the error to see the full text) Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need Cost Of Attendance minus EFC does not equal Need	Download 7 Results to Overrideable Overrideable Overrideable Overrideable Overrideable Overrideable Overrideable Overrideable Overrideable



Two places to initiate search for existing record to add missing data or delete a record.





• From Upload screen, click "Search Students,"

OR

 Click "Pages" at top screen menu bar, then click "Search Students"



• Enter student detail, click "Search"



First name	Student	Last name	J	
Ssn list	comma-separated	Student id	Student id	
Search	^			

• Click student's SSN to open record



Search for Existing URR Records for Edit, 3 of 3

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

udent J (900000010)		≪ Prev Ne	ext Return to List	Dele	ete
Details Terms On File E	rrors (Resolved)				
Student Information			FA & School Info	ormation	
First name	Student		ransaction number	1	
Middle name	Middle name		Rejected	No	~
Last name	J		Student id	Student id	
SSN or WASFA Id	90000010		Year in school 🟮	Other	~
Date of birth	06/27/2002		Need		
Gender	Male	~	Family income	70000	
ls resident	Yes	~	Duration (months)	9	
Ethnicity			COA 🕄	20000	
Hispanic origin	No	~	EFC 🕄	4000	
Asian	Yes	~	Need amount 🟮	70000	
Black/african american	No	~	Family Information		
American indian alaska native	No	~	- Family size	1	
Native hawaiian/pacific islander	No	~	Number in college	1	
White	No	~	ls dependent	No	~
Other race	No	~	Marital status	UnMarried	~



Manually Adding Student Records, 1 of 4

- Records may be added from two areas.
- From "Upload" screen or Errors screen, click "Add Record."

	20	Upload	Errors Review Submit	O Add a Note or 🔤 Send us an Ema
Jnit Reco	rd Errors verrideable - 0 must	fix - 0 overridde	n - 0 informational) 0	Add Record Revalidate
Override R	ason			
Override	Reason			
Override	0 errors Delete	0 overrides		
Status:	ILA	~		
Error Type:	View	All Error Types	~	
earch: Sea	ch errors by all fields		< Page 1 of 3 > Show 10 v	Download 26 Results to CSV
SSN ¢	Student ID ¢	Name *	Error (hover over the error to see the full text) $\ensuremath{\hat{\Rightarrow}}$	Overrideable \$
9000000	1	A, Student	Student Id Number must be provided by public schools - the f	Overrideable
9000000	1	A, Student	Summer1 term Enrollment Status cannot be Not Enrolled when S	Overrideable





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

Details Terms			
Student Information		ISIR WASFA & School Inf	ormation
First name	First name	Transaction number	in #
Middle name	Middle name	Rejected	- Select - V
Last name	Last name	Student id	Student id
SSN or WASFA Id	SSN or WASFA Id	Year in school 0	— Select — 🛛 👻
Date of birth	mm/dd/yyyy	Need	
Gender	- Select - 🗸 🗸	Family income	Family income
Is resident	— Select — 🖌 👻	Duration (months)	Duration (months)
Ethnicity		COA 0	COA
Hispanic origin	- Select - 🗸 🗸	EFC ()	EFC
Asian	— Select — 🗸 🗸	Need amount 0	Need amount
Black/african american	- Select - 🗸	Family Information	
American indian alaska native	- Select - 🗸 🗸	Family size	Family size
Native hawaiian/pacific islander	- Select 👻	Number in college	Number in college
White	- Select - 🗸 🗸	Is dependent	- Select - Y
Other race	- Select - Y	Marital status	ColortY

Details Terms						
Show All	Summer 1	Fall	Winter	Spring		Tota
Enrollment Status	Not enrolled 🗸	Not enrolled 🗸 🗸	Not enrolled 🗸	Not enrolled 🗸 🗸	Not enrolled	
Federal						
Federal Pell Grant	0	0	0	0	D	0
Federal SEOG	0	0	0	0	0	0
Federal TEACH Grant	0	0	0	0	0	0
Federal Nursing Scholarships	0	0	٥	0	0	0
Federal Work Study	0	0	0	0	0	0
Federal Nursing Health Loans	0	0	0	0	D	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	D	0
Federal Grad PLUS Loans	0	0	0	0	0	0

Washington Student Achievement Council


Manually Adding Student Records, 3 of 4

All aid must be reported by term. If the term is not applicable, report "Not

enrolled" and '0' funding (typically).

Federal	State
Federal Pell Grant	WA College Grant
Federal SEOG	WCG Apprenticeship
Federal TEACH Grant	College Bound Scholarship
Federal Nursing	Passport to College
Federal Work Study	Scholarship
Tederal Work Study	Passport to College
Federal Nursing Health Loans	Incentive Grant
Federal Direct Subsidized	National Guard Grant
Federal Direct	Alternative Routes
Unsubsidized Loans	Paraeducator
Federal Parent PLUS Loans	
Federal Grad PLUS Loans	Teacher Shortage Conditional Scholarship

Enrollment Status Teacher Grant Progr	Not enrolled 🛛 👻	Not enrolled 🗸	Not enrolled 🗸	Not oprolled	
Teacher Grant Progr				Not enrolled	Not enrolled
	ams			, <u> </u>	
WSOS BA Scholarsh	in	Institutio	on	C	Other
	19	Need Base	ed Institutional	C	Conditional Loans
WSOS Career Tech		Gift Aid		F	Private Loans
WSOS Grad Scholars	ship	Non-Need	l Based	-	
SBCTC Opportunity	Grant	Institution	al Gift Aid	(Other Loans
Other State Funded	Gift	Institution	al Employment	C	Outside Scholarships
Assistance		Institution	al Loans		/A Benefit
On Campus State W	′ork			J _	
Study				C	Other Agency Assistance
Off Campus State W	/ork				
Study					

Washington Student Achievement Council



• Users receive immediate feedback in student's Errors tab if edits needed.

Student O	(90000018)	Go to Report	Delete
Details Ter	ms On File	Errors (2 e	rrors)	
Override Reas	on			
Override Rea	ason			
Override 0 o	errors Delet	e 0 overrides		
Status:	All	~		
Error Type:	View /	All Error Types	~	
earch: Search	errors by all field	s	Page 1 of 1 > Show 10 v	vnload 2 Results to CS
SSN \$	Student ID 💠	Name *	Error (hover over the error to see the full text) ‡	Overrideable
90000018	TF038403234	O, Student	WA College Grant award not found in CSAW	Overrideable
90000018	TF038403234	O, Student	WA College Grant Amount Differs From CSAW (CSAW: 0; unit rec	Overrideable



- Find and open the student record from the Errors or the Search screen.
- Click "Delete," and then click the "Confirm Delete" buttons

udent N (900000017)	44	rev Next 🍽 Return to List	Delete Sa
Details Terms On File E	rrors (Resolved)		
Student Information		ISIR WASFA & School J	
First name	Student	Transaction number	1
Middle name	Middle name	Rejected	No Y
Last name	N	Student id	Student id
SSN or WASFA Id	90000017	Year in school ()	Junior/3rd Year 👻
Date of birth	06/22/2002	Need	
Gender	Male	 Family income 	3000
Is resident	Yes	 Duration (months) 	10
Ethnicity		COA 🚯	30000
Hispanic origin	No	✓ EFC ()	0
Asian	No	 Need amount () 	3000
Black/african american	No	Family Information	
American indian alaska native	No	 Family size 	3
Native hawaiian/pacific islander	No	V Number in college	1
White	Yes	V Is dependent	Yes 🗸
Other race	No	 Marital status 	UnMarried Y

tudent N (900000017)			Confirm Delete Cancel	
Details Terms On File	Errors (Resolved)			
Student Information		ISIR WASFA & School Ip		
First name	Student	Transaction number	1	
Middle name	Middle name	Rejected	No 👻	
Last name	Ν	Student id	Student id	
SSN or WASFA Id	90000017	Year in school ()	Junior/3rd Year 💙	
Date of birth	06/22/2002	Need		
Gender	Male 🗸	Family income	3000	
s resident	Yes 👻	Duration (months)	10	
Ethnicity		COA 3	30000	
Hispanic origin	No 🗸	EFC ()	0	
Asian	No 👻	Need amount 🕄	3000	
Black/african american	No 🗸	Family Information		
American indian alaska native	No 🗸	Family size	3	
Native hawaiian/pacific islander	No 🗸	Number in college	1	
White	Yes 👻	Is dependent	Yes 🗸	
Other race	No 🗸	Marital status	UnMarried 🗸	



- Add or delete records or make changes to multiple records simultaneously.
- Mixed types of changes may be included in a single supplemental file.
- Must use a valid .csv header as top row of file and include complete student record information in each data row.
- If editing existing records, be sure to retain full data for the student and edit only fields needing change. Overwrites existing data for affected students.
- Cannot discard Supplemental File after upload without deleting full URR data. Must upload a compensating supplemental file to reverse changes or edit those records from the Search or Errors screens.



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

	Α	В	С	D	E	F
1	IsDelete	SSN	InstitutionStudentId	LastName	FirstName	MiddleName
2	TRUE	90000014		К	Student	
3	TRUE	90000015		L	Student	
4	FALSE	90000017		N	Student	
5						

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



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



Washington Student Achievement Council



- Explanatory notes may be added for WSAC staff to view after URR submit.
- Click "Add a Note" from any screen.





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



After addressing all errors and any changes are complete, click "Continue to Review."

		Upload	Errors 🗸 🔪 R	eview	Submit		
Unit Record	I Errors rideable - 0 must f	ix - 24 overridd	len - O informational) 🟮	Add	I Record	Revalidate	Continue to Review
Override Reaso	on					<	
Override Rea	ison						
	Delate I) cupridos					
Overnde 0 e	itors Delete	overnues.					
Overnde 0 e	Deele	vovenides					
Status:	All	v					
Status: Error Type:	All	All Error Types			~		
Status: Error Type: Search: Search	All View	All Error Types	Page 1 of 1	> Show	v 50 v	▲ Downloa	nd 24 Results to CSV
Status: Error Type: Gearch: Search	All View errors by all fields	All Error Types	Page 1 of 1 Error (hover over the error to see	Show Show e the full text) ≑	> 50 >	L Downloa	nd 24 Results to CSV Overrideable \$
Status: Error Type: Search: Search SSN \$	All View errors by all fields Student ID \$	All Error Types Name B, Student	Page 1 of 1 Error (hover over the error to see Student Id Number must be provid	> Show e the full text) = ed by public scho	► 50 ► ols - the f	A Downloa	ad 24 Results to CSV Overrideable \$ Overridden: 0
Status: Error Type: Search: Search SSN \$ 90000012 90000013	All View errors by all fields	All Error Types Name * B, Student C, Student	Page 1 of 1 Error (hover over the error to see Student Id Number must be provid Student Id Number must be provid	Show e the full text) ≑ ed by public scho ed by public scho	50 V ols - the f	A Downloa	overrideable \$ Overridden 0 Overridden 0



- Review the preliminary Program Totals Report to determine if any programs are missing or if unusual patterns appear in Totals comparisons.
- Contact WSAC to discuss if questions.
- Download PDF for comparison with January 2023 final.
- If all appears in order, click "Confirm Report."
- Then click "Continue to Submit" in next screen that appears.

	Upload	• >	Errors 🗸		Review	Sul	bmit			
rogram Totals Repor	t 🚯 ent Totals and Ne	on-Need Ba	sed Federal	Loan Recipi	ent Totals				Confir	m Report
We recommend that you review missing or unusual patterns pres reasonable, confirm the report a Note! Preliminary Institutional Report after all URRs are finali	the Program Tot ent in your totals nd continue. I Totals Report i ized.	als Report, b comparisor ncludes non	elow, to do ns. Contact \ -need base	an overall as WSAC staff f ed aid; Non-	essessment o or further a essential d	of your curre dvice if you l lata will be i	nt data to ic find that to removed fr	dentify if be the co or sti	y pr hing	ograms 3 appears otals
Show All										
	2016	2010	2010	2020	2020	2031	2021	2022	A Down	nload PDF
ederal Aid	2018 Awards	-2019 Amount	2019 Awards	Amount	2020 Awards	-2021 Amount	2021 Awards	1-2022 Amount	A Down	ange Amount
ederal Aid ederal Pell Grant	2018 Awards n/a	Amount	2019 Awards n/a	Amount	2020 Awards n/a	Amount	2021 Awards	-2022 Amount \$3, 1	▲ Down h	Amount
ederal Aid ederal Pell Grant ederal SEOG	2018 Awards n/a n/a	Amount n/a n/a	2019 Awards n/a n/a	Amount n/a n/a	2020 Awards n/a n/a	Amount n/a	2021 Awards 1 0	-2022 Amount \$3, 1 \$0	▲ Down h 0.0% 0.0%	Amount 0.0%
ederal Aid ederal Pell Grant ederal SEOG ederal TEACH Grant	2018 Awards n/a n/a	Amount n/a n/a n/a	2019 Awards n/a n/a n/a	Amount n/a n/a n/a	2020 Awards n/a n/a n/a	Amount n/a n/a	2021 Awards 1 0 0	Amount 53, 1 50 50	▲ Down h 0.0% 0.0% 0.0%	Amount 0.0% 0.0%
ederal Aid ederal Pell Grant ederal SEOG ederal TEACH Grant ederal Nursing Scholarship	2018 Awards n/a n/a n/a	Amount n/a n/a n/a	2019 Awards n/a n/a n/a	Amount n/a n/a n/a	2020 Awards n/a n/a n/a	Amount n/a n/a n/a	2021 Awards 1 0 0 0	Amount 53,1 50 50 50	A Down 0.0% 0.0% 0.0%	ange Amount 0.0% 0.0% 0.0%
ederal Aid ederal Pell Grant ederal SEOG ederal TEACH Grant ederal Nursing Scholarship ederal Workstudy	2018 Awards n/a n/a n/a n/a	Amount n/a n/a n/a n/a n/a	2019 Awards n/a n/a n/a n/a n/a	Amount n/a n/a n/a n/a n/a	2020 Awards n/a n/a n/a n/a	Amount n/a n/a n/a n/a n/a	2021 Awards 1 0 0 0 0	Amount 53, h 50 50 50 50 50	▲ Down 0.0% 0.0% 0.0% 0.0%	ange Amount 0.0% 0.0% 0.0% 0.0% 0.0%



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







• Example of Differences Report for WCG

CSAW D WCG, CBS &	ifferences Report Passport Differences Between U	Jnit Record and CSAW			Retu	rn to Report Summary
wcg	*					
Search: Sea	arch	< Page	2 1 of 3	Show 10 🗸	A Down	load 25 Results to CSV
SSN \$	Name *	Student ID 🗘	Awarded \$	Unit Record \$	Difference \$	Overridden \$
90000046	O, Student		\$2,705	\$11,040	\$8,335	No
90000047	P, Student		\$3,607	\$8,832	\$5,225	No
90000048	R, Student		\$5,520	\$7,728	\$2,208	No

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



- If submitted with significant differences, WSAC staff reach out to resolve questions about the differences before the URR is finalized.
- After addressing Differences Reports review, click "Return to Report Summary" to return to Submit screen. Then, click "I have reviewed the report."

CSAW Di WCG, CBS & I	fferences Report Passport Differences Between Unit Re	ecord and CSAW			Retu	rn to Report Summary
Search: Sea	rch Name A	Student ID \$	Awarded \$	Show 10	v ♪ Drfference ≎	oad 25 Results to CSV
90000046	O, Student		\$2,705	\$11,040	\$8,335	No
90000047	P, Student		\$3,607	\$8,832	\$5,225	No
90000048	R, Student		\$5,520	\$7,728	\$2,208	No



• The "Submit" button will appear. Click "Submit," then "Confirm." Success!





"Point-in-time" URR Data File Downloads

- Full "point-in-time" URR data file downloads are now located on the "Upload" screen instead of "Search" screen. (Search screen record download now is an abbreviated file.)
- Constitutes full URR file in the Portal, with all edits, at time of download.
- Download recommended at time of URR Submit for institutional records.
- May be useful to create data file for supplemental file uploads, retaining all edits to date.





- Reports available from the Submit screen immediately after submission include:
 - Demographic Distribution Reports
 - Program Totals Report
 - WCG, CBS & Passport Differences Reports
- Profile Reports available January 2023
 - Need-Based Aid Recipients
 - State Work Study Recipients
 - WA College Grant Recipients
 - College Bound Scholarship Recipients



Successfully Submitted **1**

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

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

- Demographic Distribution Reports 🗹
- Program Totals Report 🗹
- WCG, CBS & Passport Differences 🗹
- Profile Reports



- Review the 2021-22 URR Manual, available online at: https://www.wsac.wa.gov/unit-record
- Contact Washington Student Achievement Council staff at: <u>unitrecord@wsac.wa.gov</u>

Ann Voyles	Marla Skelley	Carla Idohl-Corwin
360-485-1311	360-485-1320	360-485-1302
annv@wsac.wa.gov	<u>marlas@wsac.wa.gov</u>	<u>carlai@wsac.wa.gov</u>