



# Unit Record Report 3.0

*Submitting the 2021-22 Report  
and SBCTC ctcLink Update*

Training Webinar Presentation

July 21, 2022





# Presenters

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# 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:**  
<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



# 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 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.





# Reporting Requirements

- **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*





# Reporting Requirements, continued:

- **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.

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

Navigator > Financial Aid > CTC Custom > CTC Reports > State FA Reporting

Run Control ID WA172\_URR\_DE Report Manager Process Monitor Run

**State FA Report**

*Institution	WA172	Spokane Falls CC
*Aid Year	2022	2021-2022 Financial Aid Year
File Path	/CSTRANSFER/WA172/WCG2022/	
Report Type		

Save Return to Search Previous in List Next in List Add 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 2021-22 aid year

### Process Scheduler Request

User ID

CTC\_DENGLEHARDT

Run Control ID

WA172\_URR\_DE

---

Server Name

Run Date

07/05/2022

Recurrence

Run Time

5:01:06PM

Reset to Current Date/Time

Time Zone

#### Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	WA College Grant Report	CTC_SNGRP_AE	Application Engine	Web	TXT	Distribution
<input checked="" type="checkbox"/>	Unit Record Report	CTC_URR_AE	Application Engine	Web	TXT	Distribution

OK

Cancel

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



# Programs to Report, 1 of 3

- **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\*
- ☐ State Work Study (On- and Off-Campus)\*\*
- ☐ National Guard Grant\*
- ☐ Alternative Routes to Teaching\*
- ☐ Pipeline for Paraeducators\*
- ☐ Teacher Shortage Conditional Grant \*
- ☐ Student Teaching 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, 2 of 3

- **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)



# Programs to Report, 3 of 3

- **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*

*\* Enter Transaction number into URR and mark as a “rejected” ISIR/WASFA*





# 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

- **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 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,

2 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.**





# Valid Input Ranges – Changes for 2021-22

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



# Reporting Requirements, 1 of 3

- **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’



# Reporting Requirements, 2 of 3

- **.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



# Reporting Requirements, 3 of 3

- **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.



# FAFSA & WASFA Related Fields

- **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





# Social Security Numbers

- 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.





# Year in School

<b>'1' or 'Freshman/1st Year'</b>	<b>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.</b>
<b>'2' or 'Sophomore/2nd Year'</b>	
<b>'3' or 'Junior/3rd Year'</b>	
<b>'4' or 'Senior/4th Year'</b>	
<b>'5' or 'Unclassified/5th Year'</b>	
<b>'6' or 'Graduate'</b>	
<b>'7' or 'Professional'</b>	
<b>'8' or 'Other'</b>	



# Year in School – Other 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.



# 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
    - 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

\* These data elements should align across URR, CSAW, and FAFSA/WASFA.



# Family Income \*

- **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.



# Expected Family Contribution \*

- **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.



# Cost of Attendance

- 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.



# Need Amount

## **Cost of Attendance**

$$\begin{aligned} & - \text{ Expected Family Contribution } \\ & = \text{ **Need Amount** } \end{aligned}$$

- 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 – unless a student is out of QER

- **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, 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



# 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 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).





# Other State Funded Gift Assistance

## **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



# Ensuring 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.



# Errors that Prevent File Upload

## 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!*



# “Must Fix” (Non-Overrideable) Error Examples

- **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



# Overrideable Error Examples

- **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.**

- **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) 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.



## Reminders, continued:

- 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).

- **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 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



# Logon to the Portal

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

WSAC Portal - Login

portal.wsac.wa.gov






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**Middle/High School Staff**  
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Request a staff portal account for:  

- [GEAR UP](#)
- [College Bound Scholarship](#)
- [FAFSA Completion](#)

**Financial Aid Administrators**  
[CSAW](#)  
[Unit Record Report](#)



# Two-Factor Authentication

## Login screen 1:

The screenshot shows the 'Portal Login' page. At the top is the Washington Student Achievement Council logo. Below it, the text 'Portal Login' is centered. There are two input fields: 'Email' and 'Password'. Below the 'Password' field is a link that says 'Forgot your password?'. At the bottom is a blue 'Login' button and a link that says 'Need help?'.

## Login screen 2:

The screenshot shows the second login screen. It says 'Please log in to continue'. Below that, it says 'Please enter the 6-digit access code sent to [redacted]'. There is an input field for the 'Authentication Code'. Below the input field is a checkbox labeled 'Remember this browser'. A blue 'Verify code' button is below the checkbox. Below the button, it says 'If your code did not arrive, resend code using one of the following:'. There are four buttons: 'voice call to [redacted]', 'send text to [redacted]', 'send email to annv@\*\*\*\*.wa.gov', and 'I have an access code'.

## Portal “My Account” screen:

The screenshot shows the 'My WSAC portal account' page. It has sections for 'Login', 'Email', 'Phone', 'Personal Information', and 'Name'. Each section has an 'update' link. The 'Email' section says 'This email is used to sign in, and can be used to verify your account.' The 'Phone' section says 'This phone number can be used to verify your account via automated call or text message.' The 'Personal Information' section says '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.'





# Portal URR Submission Tool

In the Programs menu, click on Unit Record.

The screenshot shows the WSAC portal interface. At the top is the WSAC logo with the text "WASHINGTON STUDENT ACHIEVEMENT COUNCIL" and "EDUCATION · OPPORTUNITY · RESULTS". Below the logo is a blue navigation bar with the following links: Home, Admin, Common, Csaw, and Programs. The Programs link is highlighted with an orange arrow. A dropdown menu is open under Programs, showing the following options: American Indian, College Bound, Passport, SWS, Teacher, Unit Record, WASFA, and WCG. The Unit Record option is highlighted with an orange arrow. The main content area of the portal includes a welcome message, a disclaimer about confidential student information, and a list of policies.

**WASHINGTON STUDENT ACHIEVEMENT COUNCIL**  
EDUCATION · OPPORTUNITY · RESULTS

Home | Admin | Common | Csaw | **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 public.

By logging in to this tool, I acknowledge that the policies 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.



# Uploading Data from File, 1 of 3

- 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)

↓ ↕

2743 - Test school

▼

2021-2022

▼

💬 Add a Note

or

✉ Send us an Email

Upload

Errors

Review

Submit

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

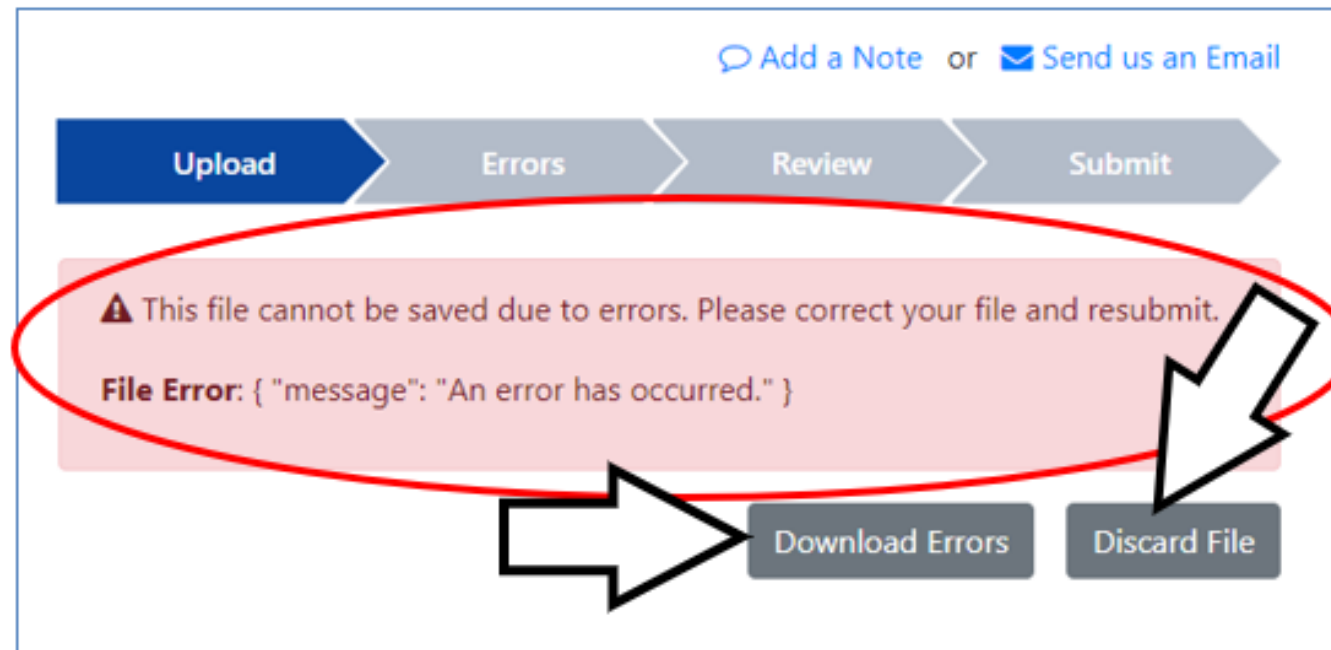
Start Upload

Create Record Manually



# Uploading Data from File, 2 of 3

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.



# Uploading Data from File, 3 of 3

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 [Send us an Email](#)

**Upload** ✓ **Errors** **Review** **Submit**

**Successfully Uploaded** ✓

**Students reported to date:** ⓘ

Year in School	Count
Freshman/1st Year	2
Sophomore/2nd Year	2
Junior/3rd Year	2
Senior/4th Year	2
Graduate	1
Other	1
<b>Total</b>	<b>10</b>





# Error Screens, 1 of 3

- 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

Unit Record Errors

26 errors (26 overrideable - 0 must fix - 0 overridden - 0 informational)

Add Record Revalidate

Override Reason

Override Reason

Override 0 errors Delete 0 overrides

Status: All

Error Type: View All Error Types

Search: Search errors by all fields

Page 1 of 3

Show 10

Download 26 Results to CSV

SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
900000011		A, Student	Student Id Number must be provided by public schools - the f...	Overrideable
900000011		A, Student	Summer1 term Enrollment Status cannot be Not Enrolled when S...	Overrideable
900000012		B, Student	Student Id Number must be provided by public schools - the f...	Overrideable
900000013		C, Student	Student Id Number must be provided by public schools - the f...	Overrideable
900000014		D, Student	Cost Of Attendance minus EFC does not equal Need	Overrideable
900000014		D, Student	Student Id Number must be provided by public schools - the f...	Overrideable
900000015		E, Student	Need Amount cannot exceed Cost of Attendance	Overrideable
900000015		E, Student	Cost Of Attendance minus EFC does not equal Need	Overrideable
		student	Student Id Number must be provided by public schools - the f...	Overrideable
		student	Cost Of Attendance minus EFC does not equal Need	Overrideable

SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
900000011		A, Student	Student Id Number must be provided by public schools - the f...	Overrideable
900000011			Student Id Number must be provided by public schools - the first 9 characters must be the PCHEES id	Overrideable
900000012				Overrideable



# Error Screens, 2 of 3

Sort by column headers, or Filter by Status or Error Type.

By status:

Status: All  
Error Type: — Select —  
Search: Search errors by all  
SSN Student

By Error Type:

Error Type: View All Error Types  
Search: Search errors by all  
SSN Student

Unit Record Errors  
26 errors (26 overrideable - 0 must fix - 0 overridden - 0 informational)

Override Reason  
Override Reason  
Override 0 errors Delete 0 overrides

Status: All  
Error Type: View All Error Types

Search: Search errors by all fields Page 1 of 3 Show 10 Download 26 Results to CSV

SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
900000011	A, Student	Student Id Number must be provided by public schools - the f...	Overrideable	
900000011	A, Student	Summer1 term Enrollment Status cannot be Not Enrolled when S...	Overrideable	
900000012	B, Student	Student Id Number must be provided by public schools - the f...	Overrideable	





## Error Screens, 3 of 3

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

<input type="checkbox"/>	SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
<input type="checkbox"/>	900000011		A, Student	Student Id Number must be provided by public schools - the f...	Overrideable
<input type="checkbox"/>	900000011			Student Id Number must be provided by public schools - the first 9 characters must be the PCHEES Id	Overrideable
<input type="checkbox"/>	900000012				Overrideable

- “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.

Search:

< Page 1 of 3 >

Show 10 ▾

[Download 26 Results to CSV](#)

<input type="checkbox"/>	SSN	Student	Name	Error (hover over the error to see the full text)	Overrideable
<input type="checkbox"/>	900000011		A, Student	Student Id Number must be provided by public schools - the f...	Overrideable
<input type="checkbox"/>	900000011			Summer1 term Enrollment Status cannot be Not Enrolled when S...	Overrideable
<input type="checkbox"/>	900000012		B, Student	Student Id Number must be provided by public schools - the f...	Overrideable



# 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

- 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

Student A (900000011)    << Prev   Next >>   Return to List    Delete   Save

Details   Terms   On File   **Errors (2 errors)**

Override Reason

Override Reason

Override 0 errors   Delete 0 overrides

Status: All

Error Type: View All Error Types

Search: Search errors by all fields   <   Page 1 of 1   >   Show 10   Download 2 Results to CSV

<input type="checkbox"/> SSN	<input type="checkbox"/> Student ID	<input type="checkbox"/> Name	<input type="checkbox"/> Error (hover over the error to see the full text)	<input type="checkbox"/> Overrideable
<input type="checkbox"/> 900000011		A, Student	Student Id Number must be provided by public schools - the f...	Overrideable
<input type="checkbox"/> 900000011		A, Student	Summer1 term Enrollment Status cannot be Not Enrolled when S...	Overrideable





# 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)



Student A (900000011) [◀ Prev](#) [Next ▶](#) [Return to List](#) [Delete](#) [Save](#)

**Details** [Terms](#) [On File](#) [Errors \(2 errors\)](#)

---

**Student Information**

First name	Student
Middle name	Middle name
Last name	A
SSN or WASFA Id	900000011
Date of birth	06/21/2002
Gender	Female ▼
Is resident	Yes ▼

**Ethnicity**

Hispanic origin	Yes ▼
Asian	No ▼
Black/african american	No ▼
American indian alaska native	No ▼
Native hawaiian/pacific islander	No ▼
White	No ▼
Other race	No ▼

**ISIR WASFA & School Information**

Transaction number	1
Rejected	No ▼
Student id	Student id
Year in school	Freshman/1st Year ▼

**Need**

Family income	30000
Duration (months)	6
COA	20000
EFC	0
Need amount	20000

**Family Information**

Family size	2
Number in college	1
Is dependent	No ▼
Marital status	Married ▼



# Editing Student Records, 3 of 7

- 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

Student A (900000011) [← Prev](#) [Next →](#) [Return to List](#) [Delete](#) [Save](#)

[Details](#) **Terms** [On File](#) [Errors \(2 errors\)](#)

☐ **Show All**  
[Click to lock](#)

	Summer 1	Fall	Winter	Spring	Summer 2	Total
Enrollment Status	Not enrolled ▼	Not enrolled ▼	Not enrolled ▼	Not enrolled ▼	Not enrolled ▼	
State						
WA College Grant	1000	0	0	0	0	1,000
<b>Total</b>	<b>1,000</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1,000</b>

- 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 (900000011) [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	✓
WCG	\$1,000	\$1,000	✓
CBS	\$0	\$0	✓
PTC	\$0	\$0	✓
PTC - Incentive	\$0	\$0	✓
Teacher Shortage		\$0	✓
Paraeducator		\$0	✓
ALT		\$0	✓
STG		\$0	✓
National Guard		\$0	✓



# Editing Student Records, 5 of 7

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

Student A (900000011)    << Prev   Next >>   Return to List    Delete   Save

Details   Terms   On File   Errors (2 errors)

Override Reason

This is an example comment to demonstrate how to override the checked error message

Override 1 errors   Delete 0 overrides

Status:   Error Type: View All Error Types

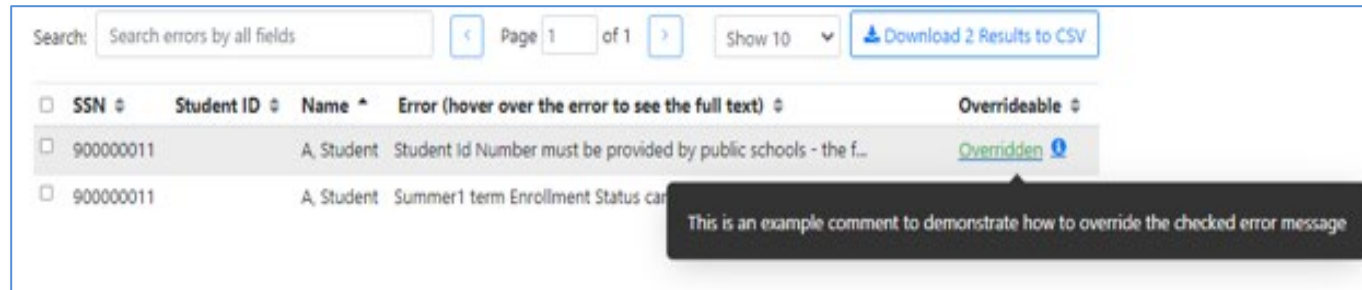
Search: errors by all fields   Page 1 of 1   Show 10   Download results to CSV

	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
<input checked="" type="checkbox"/>	900000011	A, Student	Student Id Number must be provided by public schools - the f...	Overrideable
<input type="checkbox"/>	900000011	A, Student	Summer1 term Enrollment Status cannot be Not Enrolled when S...	Overrideable

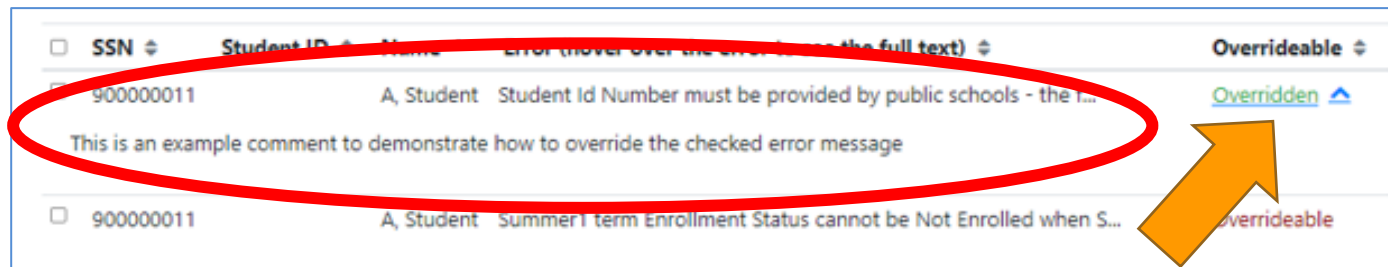


# Editing Student Records, 6 of 7

- Quickly view Override reason entered by hovering cursor over blue icon next to “Overridden” message.



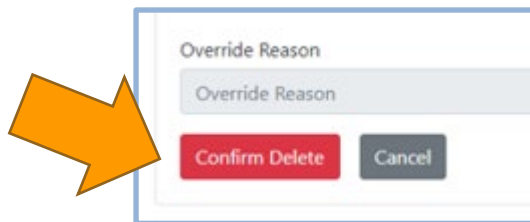
- To view Override reason as part of the Errors list, click the green “Overridden” text, and the comment will appear below the Error message..





# Editing Student Records, 7 of 7

- 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”

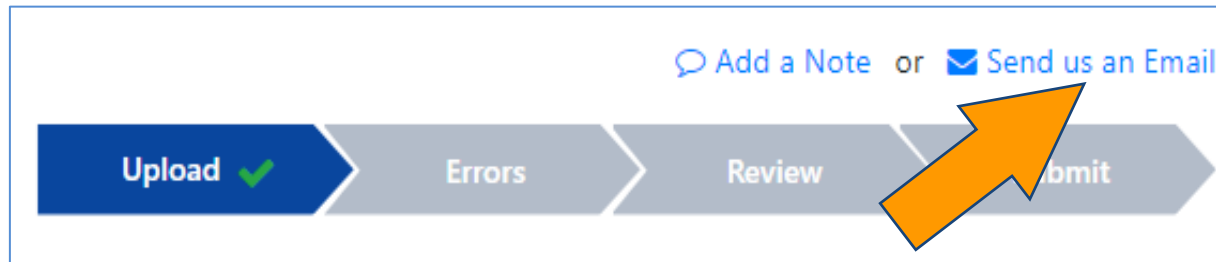


SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
<input checked="" type="checkbox"/>	900000001	A, Student	Student Id Number must be provided by public schools - the f...	Overridden
<input type="checkbox"/>	900000001	A, Student	Summer1 term Enrollment Status cannot be Not Enrolled when S...	Overrideable



# Resolving Social Security Number Differences

**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.





# “Bulk” Override Processing, 1 of 2

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

The screenshot displays the 'Institution Main Errors' interface. At the top, there is an 'Override Reason' section with a text input field and two buttons: 'Override 0 errors' and 'Delete 0 overrides'. Below this, the 'Status' is set to 'All'. The 'Error Type' dropdown menu is open, showing a list of error types. The first two options are 'View All Error Types' (highlighted in blue) and '— Select —'. The remaining options are: 'Need Amount cannot exceed Cost of Attendance', 'Total aid reported is zero', 'Cost Of Attendance minus EFC does not equal Need', 'Student Id Number must be provided by publics', 'Passport To College Amount Differs From CSAW', 'Summer1 term Enrollment Status cannot be Not Enrolled when Summer1 term aid has been reported', and 'Passport recipient not independent'. Below the dropdown, there is a search bar and a table of student records. The table has columns for 'SSN', 'Student', and 'Overrideable'. The first two rows show SSN 900000011 for two different students, both with the error 'Student Id Number must be provided by publics' and marked as 'Overrideable'. The next two rows show SSN 900000012 and 900000013 for two different students, both with the error 'Student Id Number must be provided by public schools - the f...' and marked as 'Overrideable'. A button 'Load 26 Results to CSV' is visible on the right side of the table.

SSN	Student	Error Type	Overrideable
900000011		Student Id Number must be provided by publics	Overrideable
900000011		Student Id Number must be provided by publics	Overrideable
900000012	B, Student	Student Id Number must be provided by public schools - the f...	Overrideable
900000013	C, Student	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.”

Override Reason  
This is an example of the bulk override comment for COA-EFC does not equal Need

Override 7 errors Delete 0 overrides

Status: All

Error Type: Cost Of Attendance minus EFC does not equal Need

Search: Search errors by all fields Page 1 of 1 Show 50 Download 7 Results to CSV

<input checked="" type="checkbox"/> SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
<input checked="" type="checkbox"/>	900000014	D, Student	Cost Of Attendance minus EFC does not equal Need	Overrideable
<input checked="" type="checkbox"/>	900000015	E, Student	Cost Of Attendance minus EFC does not equal Need	Overrideable
<input checked="" type="checkbox"/>	900000016	F, Student	Cost Of Attendance minus EFC does not equal Need	Overrideable
<input checked="" type="checkbox"/>	900000017	G, Student	Cost Of Attendance minus EFC does not equal Need	Overrideable
<input checked="" type="checkbox"/>	900000018	H, Student	Cost Of Attendance minus EFC does not equal Need	Overrideable
<input checked="" type="checkbox"/>	900000019	I, Student	Cost Of Attendance minus EFC does not equal Need	Overrideable
<input checked="" type="checkbox"/>	900000020	J, Student	Cost Of Attendance minus EFC does not equal Need	Overrideable



# Search for Existing URR Records for Edit, 1 of 3

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

Upload ☒ Errors Review Submit

Successfully Uploaded ☒

Search Students Add File Add Record

Students 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
<b>Total</b>	<b>10</b>

Discard Upload Download Report Continue

Unit Record Pages Dev Routes Ted

Search Students

2743 - Test school 2021-2022

- From Upload screen, click “Search Students,”
- OR
- Click “Pages” at top screen menu bar, then click “Search Students”



# Search for Existing URR Records for Edit, 2 of 3

- Enter student detail, click “Search”

Unit Record Search

Academic year: 2021-2022 Institution: 2743 - Test school

First name: First name Last name: Last name

Ssn list: comma-separated Student id: Student id

Search

Unit Record Search

Academic year: 2021-2022 Institution: 2743 - Test school

First name: Student Last name: J

Ssn list: comma-separated Student id: Student id

Search

Search: Search field Page 1 of 1 Show 10 Download 1 Results to CSV

SSN	First name	Student ID	Family Size	In College	Family Income	EFC Amount	Need	Year In School
900000010	J, Student		1	1	\$70,000	\$4,000	\$70,000	Other

- 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.”

Student J (900000010) ◀ Prev Next ▶ [Return to List](#) Delete Save

[Details](#) [Terms](#) [On File](#) [Errors \(Resolved\)](#)

**Student Information**

First name	Student
Middle name	Middle name
Last name	J
SSN or WASFA Id	900000010
Date of birth	06/27/2002
Gender	Male
Is resident	Yes

**Ethnicity**

Hispanic origin	No
Asian	Yes
Black/african american	No
American indian alaska native	No
Native hawaiian/pacific islander	No
White	No
Other race	No

**FA & School Information**

Transaction number	1
Rejected	No
Student id	Student id
Year in school	Other

**Need**

Family income	70000
Duration (months)	9
COA	20000
EFC	4000
Need amount	70000

**Family Information**

Family size	1
Number in college	1
Is dependent	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.”

Unit Record Errors

26 errors (26 overrideable - 0 must fix - 0 overridden - 0 informational)

Override Reason

Override Reason

Override 0 errors Delete 0 overrides

Status: All

Error Type: View All Error Types

Search: Search errors by all fields

Page 1 of 3

Show 10

Download 26 Results to CSV

SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
900000011	A, Student	Student Id Number must be provided by public schools - the f...	Overrideable	
900000011	A, Student	Summer1 term Enrollment Status cannot be Not Enrolled when S...	Overrideable	
900000012	B, Student	Student Id Number must be provided by public schools - the f...	Overrideable	

Upload ✓ Errors Review Submit

Successfully Uploaded ✓

Search Students

Add File Add Record

Students reported to date:

Year in School	
Freshman/1st Year	
Sophomore/2nd Year	2
Junior/3rd Year	2
Senior/4th Year	2
Graduate	1
Other	1
<b>Total</b>	<b>10</b>

Discard Upload Download Report Continue



# Manually Adding Student Records, 2 of 4

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

**Add Unit Record**

Details Terms

**Student Information**

First name

Middle name

Last name

SSN or WASFA Id

Date of birth

Gender

Is resident

**Ethnicity**

Hispanic origin

Asian

Black/african american

American indian alaska native

Native hawaiian/pacific islander

White

Other race

**ISIR WASFA & School Information**

Transaction number

Rejected

Student id

Year in school

**Need**

Family income

Duration (months)

COA

EFC

Need amount

**Family Information**

Family size

Number in college

Is dependent

Marital status

**Save**

**Add Unit Record**

Details Terms

☒ Show All [Click to lock](#)

	Summer 1	Fall	Winter	Spring	Summer 2	Total
Enrollment Status	<input type="text" value="Not enrolled"/>	<input type="text" value="Not enrolled"/>	<input type="text" value="Not enrolled"/>	<input type="text" value="Not enrolled"/>	<input type="text" value="Not enrolled"/>	
<b>Federal</b>						
Federal Pell Grant	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Federal SEOG	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Federal TEACH Grant	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Federal Nursing Scholarships	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Federal Work Study	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Federal Nursing Health Loans	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Federal Direct Subsidized Loans	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Federal Direct Unsubsidized Loans	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Federal Parent PLUS Loans	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Federal Grad PLUS Loans	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
<b>State</b>						

**Save**



# 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).

<input checked="" type="checkbox"/> Show All <a href="#">Click to lock</a>	Summer 1	Fall	Winter	Spring	Summer 2	Total
Enrollment Status	Not enrolled ▼	Not enrolled ▼	Not enrolled ▼	Not enrolled ▼	Not enrolled ▼	

Teacher Grant Programs
WSOS BA Scholarship
WSOS Career Tech
WSOS Grad Scholarship
SBCTC Opportunity Grant
Other State Funded Gift Assistance
On Campus State Work Study
Off Campus State Work Study
WorkForce Training Funds

<b>Institution</b>
Need Based Institutional Gift Aid
Non-Need Based Institutional Gift Aid
Institutional Employment
Institutional Loans

<b>Other</b>
Conditional Loans
Private Loans
Other Loans
Outside Scholarships
VA Benefit
Other Agency Assistance

<b>Federal</b>
Federal Pell Grant
Federal SEOG
Federal TEACH Grant
Federal Nursing Scholarships
Federal Work Study
Federal Nursing Health Loans
Federal Direct Subsidized Loans
Federal Direct Unsubsidized Loans
Federal Parent PLUS Loans
Federal Grad PLUS Loans

<b>State</b>
WA College Grant
WCG Apprenticeship
College Bound Scholarship
Passport to College Scholarship
Passport to College Incentive Grant
National Guard Grant
Alternative Routes
Paraeducator
Teacher Shortage Conditional Scholarship



# Manually Adding Student Records, 4 of 4

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

Student O (900000018) Go to Report Delete Save

[Details](#) [Terms](#) [On File](#) **Errors (2 errors)**

Override Reason  
  
Override 0 errors Delete 0 overrides

Status:   
Error Type:

Search:  < Page 1 of 1 > Show 10 Download 2 Results to CSV

<input type="checkbox"/>	SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
<input type="checkbox"/>	900000018	TF038403234	O, Student	WA College Grant award not found in CSAW	Overrideable
<input type="checkbox"/>	900000018	TF038403234	O, Student	WA College Grant Amount Differs From CSAW (CSAW: 0; unit rec...	Overrideable





# Manually Deleting Student Records

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

Student N (900000017) ◀ Prev Next ▶ [Return to List](#) Delete Save

Details Terms On File Errors (Resolved)

**Student Information**

First name	Student
Middle name	Middle name
Last name	N
SSN or WASFA Id	900000017
Date of birth	06/22/2002
Gender	Male
Is resident	Yes

**Ethnicity**

Hispanic origin	No
Asian	No
Black/african american	No
American indian alaska native	No
Native hawaiian/pacific islander	No
White	Yes
Other race	No

**ISIR WASFA & School Information**

Transaction number	1
Rejected	No
Student id	Student id
Year in school	Junior/3rd Year

**Need**

Family income	3000
Duration (months)	10
COA	30000
EFC	0
Need amount	3000

**Family Information**

Family size	3
Number in college	1
Is dependent	Yes
Marital status	UnMarried

Student N (900000017) ◀ Prev Next ▶ [Return to List](#) Confirm Delete Cancel

Details Terms On File Errors (Resolved)

**Student Information**

First name	Student
Middle name	Middle name
Last name	N
SSN or WASFA Id	900000017
Date of birth	06/22/2002
Gender	Male
Is resident	Yes

**Ethnicity**

Hispanic origin	No
Asian	No
Black/african american	No
American indian alaska native	No
Native hawaiian/pacific islander	No
White	Yes
Other race	No

**ISIR WASFA & School Information**

Transaction number	1
Rejected	No
Student id	Student id
Year in school	Junior/3rd Year

**Need**

Family income	3000
Duration (months)	10
COA	30000
EFC	0
Need amount	3000

**Family Information**

Family size	3
Number in college	1
Is dependent	Yes
Marital status	UnMarried




## Supplemental File Uploads, 1 of 3

- 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.



## Supplemental File Uploads, 2 of 3

- 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.



	A	B	C	D	E	F
1	IsDelete	SSN	InstitutionStudentId	LastName	FirstName	MiddleName
2	TRUE	9000000014		K	Student	
3	TRUE	9000000015		L	Student	
4	FALSE	9000000017		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.



# Supplemental File Uploads, 3 of 3

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

Upload Errors Review Submit

Successfully Uploaded

Search Students Add File Add Record

Students reported to date: ⓘ

Year in School	Count
Freshman/1st Year	2
Sophomore/2nd Year	3
Junior/3rd Year	4
Senior/4th Year	2
Graduate	1
Other	1
<b>Total</b>	<b>13</b>

Discard Upload Download Report Continue

Add a Note or Send us an Email

Upload Errors Review Submit

### Add New File

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 (from CSAW or another reporting application)

Download the template [here](#).

Partial change Test File-3 06-22-2022 unit-record-report.csv Browse

Cancel Start Upload

Add a Note or Send us an Email

Upload Errors Review Submit

Successfully Uploaded

Search Students Add File Add Record

Students reported to date: ⓘ

Year in School	Count
Freshman/1st Year	2
Sophomore/2nd Year	2
Junior/3rd Year	4
Senior/4th Year	2
Graduate	1
Other	1
<b>Total</b>	<b>12</b>

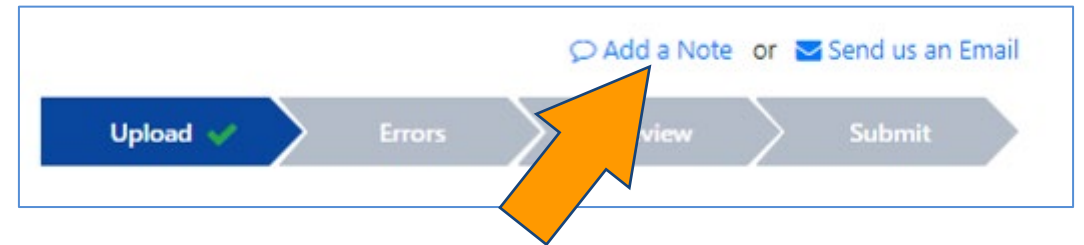
Discard Upload Download Report Continue



# Add Notes to URR

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

The screenshot shows the 'Add a Note' form. At the top, there is a navigation bar with 'Upload' (checked), 'Errors', 'Review', and 'Submit'. Below this, the 'Add a Note' section contains a text area for entering a note. An orange arrow points to the 'Save Note' button at the bottom right of the text area. Another orange arrow points to the text area itself. The text inside the text area reads: 'Anything we should know? Feel free to leave us a detailed note. Be sure to mention the page you were on, the student you were looking at, etc. We'll see it when you submit your report.'



- 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.



# Review and Submit the URR, 1 of 6

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

Unit Record Errors

24 errors (24 overrideable - 0 must fix - 24 overridden - 0 informational)

Override Reason

Override Reason

Override 0 errors Delete 0 overrides

Status: All

Error Type: View All Error Types

Search: Search errors by all fields

Page 1 of 1

Show 50

Download 24 Results to CSV

SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
900000012	B, Student	Student Id Number must be provided by public schools - the f...	Overridden	
900000013	C, Student	Student Id Number must be provided by public schools - the f...	Overridden	
900000014	D, Student	Cost Of Attendance minus EFC does not equal Need	Overridden	



# Review and Submit the URR, 2 of 6

- 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** Submit

### Program Totals Report ⓘ

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

[Confirm Report](#)

We recommend that you review the Program Totals Report, below, to do an overall assessment of your current data to identify if any programs are 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, confirm the report and continue.

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

Show All ▼

[Download PDF](#)

	2018-2019		2019-2020		2020-2021		2021-2022		Change	
Federal Aid	Awards	Amount	Awards	Amount	Awards	Amount	Awards	Amount	Amount	Amount
Federal Pell Grant	n/a	n/a	n/a	n/a	n/a	n/a	1	\$3,100	0.0%	0.0%
Federal SEOG	n/a	n/a	n/a	n/a	n/a	n/a	0	\$0	0.0%	0.0%
Federal TEACH Grant	n/a	n/a	n/a	n/a	n/a	n/a	0	\$0	0.0%	0.0%
Federal Nursing Scholarship	n/a	n/a	n/a	n/a	n/a	n/a	0	\$0	0.0%	0.0%
Federal Workstudy	n/a	n/a	n/a	n/a	n/a	n/a	0	\$0	0.0%	0.0%
Federal Perkins Loan	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	0.0%	0.0%





# Review and Submit the URR, 3 of 6

- 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.

CSAW Differences Report  
WCG, CBS & Passport Differences Between Unit Record and CSAW

wcg  
— Select —  
wgc  
cbs  
ptc

SSN Name Student ID Awarded

[Add a Note](#) or [Send us an Email](#)

Upload ✓ Errors ✓ Review ✓ Submit

Before submitting, please review the WCG, CBS & Passport Differences report in the list below.

[I've reviewed the report](#)

If all errors and differences have been addressed, and your Program Totals Report appears reasonable, click submit.

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 and Submit the URR, 4 of 6

- Example of Differences Report for WCG

CSAW Differences Report  
WCG, CBS & Passport Differences Between Unit Record and CSAW

Return to Report Summary

wcg

Search:  Page 1 of 3 Show 10 [Download 25 Results to CSV](#)

SSN	Name	Student ID	Awarded	Unit Record	Difference	Overridden
900000046	O, Student		\$2,705	\$11,040	\$8,335	No
900000047	P, Student		\$3,607	\$8,832	\$5,225	No
900000048	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.



## Review and Submit the URR, 5 of 6

- 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 Differences Report**  
WCG, CBS & Passport Differences Between Unit Record and CSAW

Search:  Page 1 of 3 Show 10 [Download 25 Results to CSV](#)

[Return to Report Summary](#)

SSN	Name	Student ID	Awarded	Unit Record	Difference	Overridden
900000046	O, Student		\$2,705	\$11,040	\$8,335	No
900000047	P, Student		\$3,607	\$8,832	\$5,225	No
900000048	R, Student		\$5,520	\$7,728	\$2,208	No

Upload ✓ Errors ✓ Review ✓ **Submit**

Before submitting, please review the WCG, CBS & Passport Differences report in the list below.

[I've reviewed the report](#)



# Review and Submit the URR, 6 of 6

- The “Submit” button will appear. Click “Submit,” then “Confirm.” Success!

Upload ✓ Errors ✓ Review ✓ **Submit**

**Ready To Submit?** ⓘ

If all errors and differences have been addressed, and your Program Totals Report appears reasonable, click submit.

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

**Submit**

[Add a Note](#) or [Send us an Email](#)

Upload ✓ Errors ✓ Review ✓ **Submit**

**Ready To Submit?** ⓘ

**Confirm** **Cancel**

[Add a Note](#) or [Send us an Email](#)

Upload ✓ Errors ✓ Review ✓ **Submit** ✓

**Successfully Submitted** ✓

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

- [Demographic Distribution Reports](#)
- [Program Totals Report](#)
- [WCG, CBS & Passport Differences](#)
- [Profile Reports](#)



# “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.

The screenshot shows a web interface for URR data. At the top, there are four tabs: 'Upload' (highlighted with a green checkmark), 'Errors', 'Review', and 'Submit'. Below the tabs, the text 'Successfully Uploaded' is displayed with a green checkmark. There are three buttons: 'Search Students', 'Add File', and 'Add Record'. Below these, it says 'Students reported to date:' followed by an information icon. A table follows with two columns: 'Year in School' and 'Count'. The table lists: Freshman/1st Year (2), Sophomore/2nd Year (3), Junior/3rd Year (4), Senior/4th Year (2), Graduate (1), Other (1), and a Total of 13. A large orange arrow points from the 'Total' row to the 'Download Report' button at the bottom. The bottom row contains three buttons: 'Discard Upload', 'Download Report', and 'Continue'.

Year in School	Count
Freshman/1st Year	2
Sophomore/2nd Year	3
Junior/3rd Year	4
Senior/4th Year	2
Graduate	1
Other	1
<b>Total</b>	<b>13</b>



# Reports Available After Submission

- 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

The screenshot shows the WSAC submission interface. At the top, there is a dropdown menu for the school (2743 - Test school) and a dropdown for the school year (2021-2022). Below these are links for 'Add a Note' and 'Send us an Email'. A progress bar shows four steps: 'Upload' (green checkmark), 'Errors' (green checkmark), 'Review' (green checkmark), and 'Submit' (green checkmark). An orange arrow points to the 'Review' step. Below the progress bar, the text 'Successfully Submitted' is displayed with an information icon. A message states: 'The following reports present a summary analysis of the Unit Record data for your institution.' Below this, a 'Please note' section states: 'The Profile Reports will be produced in January. WSAC will notify institutions when the Profile Reports are available for download:'. A list of reports is shown with links: 'Demographic Distribution Reports', 'Program Totals Report', 'WCG, CBS & Passport Differences', and 'Profile Reports'. An orange arrow points to the 'Profile Reports' link.



## Where to go for help – ctcLink System

- 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 2021-22 URR Manual, available online at:  
<https://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>Marla Skelley</b>	<b>Carla Idohl-Corwin</b>
360-485-1311	360-485-1320	360-485-1302
<a href="mailto:annv@wsac.wa.gov"><u>annv@wsac.wa.gov</u></a>	<a href="mailto:marlas@wsac.wa.gov"><u>marlas@wsac.wa.gov</u></a>	<a href="mailto:carlai@wsac.wa.gov"><u>carlai@wsac.wa.gov</u></a>