

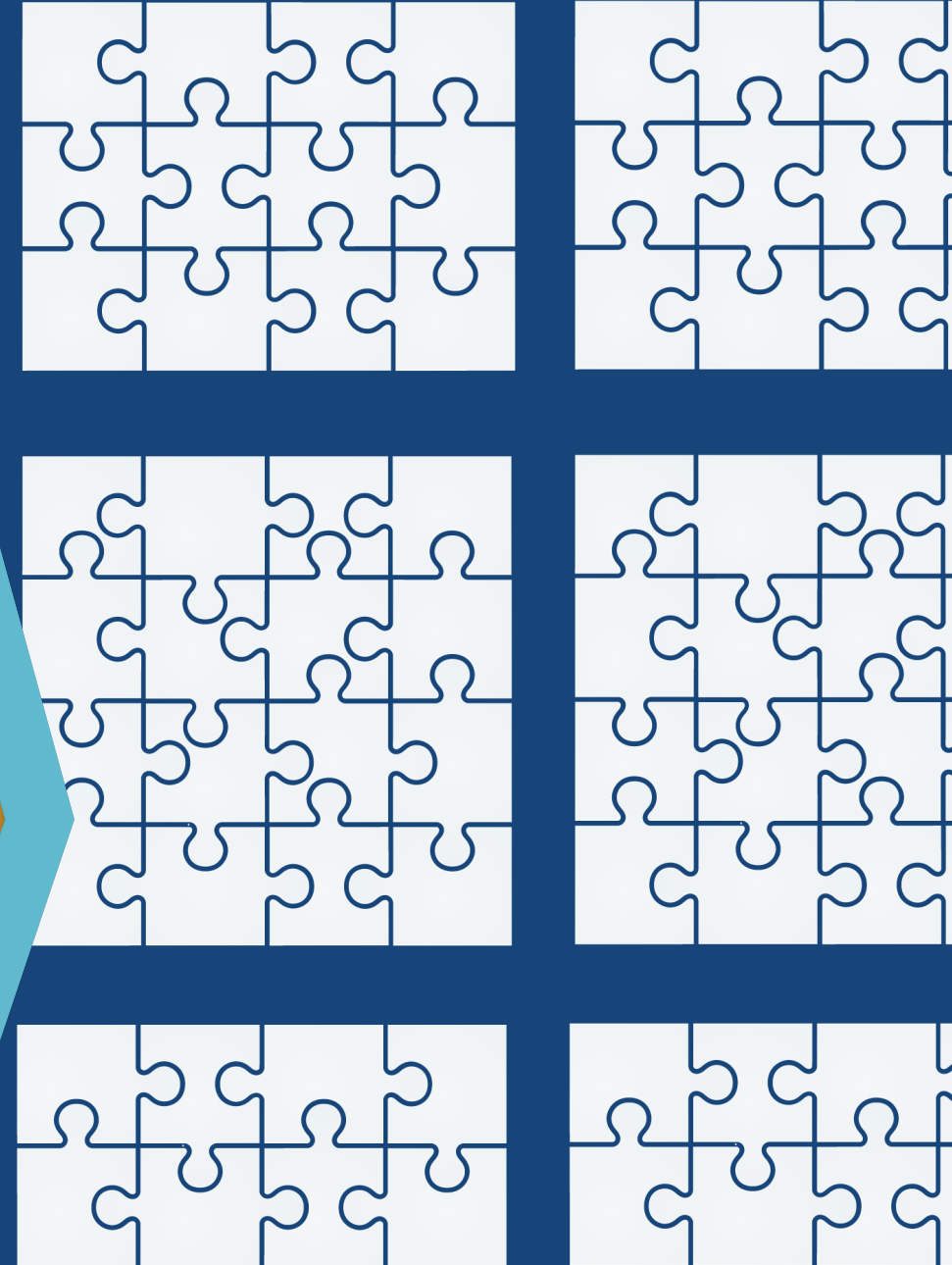


# Unit Record Report 3.0

*Submitting the 2023-24 Report  
and SBCTC ctcLink/PeopleSoft Update*

Training Webinar Presentation

August 13, 2024





# Presenters

**Stephanie Casino, Senior Functional Analyst – Financial Aid, SBCTC**

**Marla Skelley, Associate Director for Compliance, WSAC**

**Ann Voyles, Program Associate, WSAC**





# 2023-2024 WSAC Unit Record Report Review Team

- Neesha Griffiths, Receivables Coordinator
- Debbie Jackson, Assistant Director, State Work Study
- Calvin Romaker, Program Manager, State Work Study
- Marla Skelley, Associate Director for Compliance
- Ann Voyles, Program Associate



# 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>
- **August 2024:** URR Training; PortalTraining website available for file testing and practice of URR features
- **August 12:** Unit Record Report (URR) application opens
- **October 14:** Finalized report due
- **October/November:** WSAC analysis
- **December:** Reports to policy makers
- **January 2025:** 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 files in updated CSV layout format with a header row.
  - Report only students who received financial aid based on the 2023-24 FAFSA or WASFA year.
  - 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 – 2023-24 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 2023-24 FAFSA or WASFA.
- Report on next year's URR all financial aid received based on the 2024-25 FAFSA or WASFA.

- **State FA Reporting Component**

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

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

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

**State FA Report**

*Institution	WA172	Spokane Falls CC
*Aid Year	2024	2023-2024 Financial Aid Year
File Path	/CSTRANSFER/WA172/WCG2024/	
Report Type	▼	

Save 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 2023-24 aid year

Process Scheduler Request

User ID CTC\_SCASINO      Run Control ID WA172\_URR\_SC

Server Name       Run Date

Recurrence       Run 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

- **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 \*
- WA Bridge Grant \*
- 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*





# 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 2023-24 Unit Record Report Portal,

1 of 2

- **Field Name Corrections to .CSV Header File Record Layout**
  - WCGBridge corrected to read WABridge
- **Functional improvements**
  - Refinement to Override comment edit capability



# Changes for the 2023-24 Unit Record Report Portal,

2 of 2

- **Error Code Changes**
  - Total Need-based aid exceeds the reported Need Amount
    - Now an Overrideable Error rather than Informational. Requires school review to make correction or enter an override comment.
  - Enrollment does not match Need Duration
    - Removed as a standard Error message. Records will be manually scrutinized for this condition by WSAC on an individual, randomized basis.
- **Refer to Pages iii and iv in the Manual for additional details**



# Early Announcement: Potential changes for the 2024-25 Unit Record Report Portal

- **The Washington College Grant-Connect (WCG-C) – Discussion whether to report as separate field from WCG in 2024-25.**
- **Washington College Grant-Apprenticeship (WCG-A) and Native American Apprenticeship may become URR reportable in 2024-25 or 2025-26**
- **Potential for addition of new state-funded aid programs enacted by the Legislature. Specific details will be announced as soon as available.**



# Reporting Requirements, 1 of 2

- **.CSV file requires header row (revised sample is available)**
- **For all financial aid recipients reported**
  - Required fields:
    - SSN
    - First Name
    - Last Name
    - Gender
    - Is State Resident
    - Year In School
    - ISIR/WASFA Transaction #
    - Rejected ISIR WASFA
    - **Enrollment Status for each of all five terms**
    - **Financial Aid for each of all five terms – even if '0'**
- Report non-need-based aid received for all need-based recipients



# Reporting Requirements, 2 of 2

- **Financial aid reported for each of five terms - based on 2023-24 FAFSA or WASFA:**
  - Summer-1 (primarily leader/header schools; report Summer-2 as '0')
  - Fall
  - Winter (semester schools to report as zeros '0')
  - Spring
  - Summer-2 (primarily trailer schools; report Summer-1 as '0')
  - Clock hour schools may report aid for both summer terms (all 5 terms)
  - If recipient enrolled more than one "term" in same summer – report total amount received and enrollment status as one enrollment term.
  - Review Chapter 2 of Manual for detailed information.





# FAFSA & WASFA Related Fields

- **Fields to also report for 2023-24 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, Passport to College, and Bridge recipients are compared to CSAW records.
- SSNs of recipients of other WSAC applications (Teacher, WAVE, and National Guard programs) are compared to other Portal 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 2023-24 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 in family size unless it is a professional judgment decision, reprocessed through FAFSA/WASFA, and updated in CSAW

\* 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 2023-24 FAFSA or WASFA**
    - Generally, will be the 2021 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).
    - This is 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 2023-24 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).
- Overawards flagged when  $\text{COA} - \text{EFC} - \text{EFA} *$  equals a negative Need

\* Estimated Financial Assistance (EFA)



# 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'



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

- Report the final awards and enrollment levels of student at time of disbursement.
- The Unit Record Reporting tool checks awards 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 2023-24
  - 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 student's 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 2023-24 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 Scholars

# EDITS



# Ensuring Data Quality

- Edits help ensure data quality.
- Only two informational edits effective 2023-24 URR:
  - Date of Birth Outside Expected Range
  - Expected Family Contribution Outside Expected Range
- Appendix C lists all edit errors and what action needs to take place.



# Errors that Prevent File Upload

## Refer to **Appendix C (page 82)** 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 82-85) 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 82-85) – 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.**

- **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 your edit response.
- Report Family Income using WCG income calculation, not federal Total Income field from FAFSA without appropriate adjustments. Income reported in CSAW for 2023-24 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. Comparisons appear in the On File 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 until the deadline!
- Review WSAC's 2023-24 URR Manual and training materials. Test uploads using the PortalTraining environment:

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

(Data entered is temporary and clears overnight)

- Use URR informational reports to check for consistency & validity.
- CTCs – Review SBCTC 2023-24 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

WASHINGTON STUDENT ACHIEVEMENT COUNCIL  
EDUCATION · OPPORTUNITY · RESULTS

WSAC Secure Portal  
Washington Student Achievement Council  
Login

**Middle/High School Staff**

[View FAFSA Completion statistics](#) for public school students

Request a staff portal account for:

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

**Financial Aid Administrators**

[CSAW](#)

[Unit Record Report](#)

theWashBoard.org

WA529 GET Dream Ahead

GEAR UP WASHINGTON STATE

College Bound Scholarship WASHINGTON

WASHINGTON OPPORTUNITY PATHWAYS





# Portal URR Submission Tool

In the Programs menu, click on Unit Record.

The screenshot shows the Washington Student Achievement Council (WSAC) portal. At the top left 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 items: "Home", "Admin", "Common", "Csaw", and "Programs". The "Programs" item is highlighted with an orange arrow pointing to it. A dropdown menu is open under "Programs", listing several options: "American Indian", "College Bound", "Passport", "SWS", "Teacher", "Unit Record", "WASFA", and "WCG". The "Unit Record" option is highlighted with an orange arrow pointing to it. Below the navigation bar, the page content includes a welcome message, a confidentiality notice, 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 general 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 2

- The Welcome/Upload screen will appear, with a Navigation bar tracking progress.
- Browse your file directory to select the CSV file for upload
  - **NOTE:** WSAC **auto-creates** and **adds** records to URR for students who have award data in WSAC records but are omitted from the upload file
- Click the blue “Start Upload” button

7155 - Test School 2023-2024

[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



# Uploading Data from File, 2 of 2

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	2
Senior/4th Year	2
Graduate	1
Other	1
<b>Total</b>	<b>10</b>

Delete All URR Data Download Report **Continue**



After successful upload, verify accuracy of student numbers by year in school and total records. Click “Continue” if the data is good.

Upload Errors Review Submit

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

**Row Errors**

- Row 3987 Field IsStateResident: " " is an invalid value
- Row 3987 Field RejectedIsirWasfa: " " is an invalid value
- Row 3988 Field IsStateResident: " " is an invalid value
- Row 3988 Field RejectedIsirWasfa: " " is an invalid value

Download Errors Try Again



If the upload fails due to “critical errors,” download error report to review errors, make corrections to the upload file, and then click “Try Again.” Reattempt upload with the revised file.



# Overview of Error Status Types (Appendix C)

- **“Critical Errors”**

These errors prevent file upload. Errors must be corrected in the upload file before attempt to upload revised file.

- **“Must Fix”**

Non-Overrideable errors are revealed after successful file upload. Must save correction to the student record before moving forward to complete URR submission.

- **“Overrideable”**

Errors that require correction or override explanation entry in the student record.

- **“Informational”**

These errors may or may not require correction to ensure clarity in reporting, depending on circumstances. **Must review record** to determine: (1) if a correction is required, or (2) if an override comment or a “Note” entry is required, or (3) if record can be left with little or no comment. WSAC does review informational error records for accuracy.



# Main Institutional Error Screen

From Main Error Screen, sort by column headers, or Filter:

By Status:

Status: All

Error Type:   
 — Select —  
 All  
 New Messages  
 Must Fix  
 Overrideable  
 Overridden  
 Informational  
 Resolved

\* Resolved errors with no comment history do not appear in this table

Search: Search errors by all fields

or, by Error Type:

Error Type: View All Error Types

— Select —  
 View All Error Types  
 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 public schools  
 Passport To College Amount Differs From CSAW  
 Summer1 term Enrollment Status cannot be Not Enrolled when Summer1 term aid h  
 Passport recipient not independent

Search: Search errors by all fields

SSN	Student
900000011	
900000011	

Dropdown selection of viewable records per screen

Click highlighted SSN to open record

Upload  Errors Review Submit

### Unit Record Errors

36 errors (36 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

\* Resolved errors with no comment history do not appear in this table

Search: Search errors by all fields

< Page 1 of 4 > Show 10

Download 36 Results to CSV

SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
900000001		A, Student	WA College Grant award not round in CSAW	Overrideable
900000001		A, Student	Student Id Number must be provided by public schools - the f...	Overrideable
900000001		A, Student	WA College Grant amount differs from CSAW (CSAW: 0; unit rec...	Overrideable





# Editing Student Records – Error tab, 1 of 7

- Click one of four tabs to navigate within record
- No SSN “click” function while in the student record
- Error list downloadable
- Enter override comments from this screen or main Error screen
- Enter corrections in Details and Terms tabs. Resolved errors disappear from list if corrected before comment.
- Save all work by clicking blue “Save” button before exiting record

Student B (900000002)    << Prev   Next >>   Return to List    Delete   Save

Details   Terms   On File   Errors (3)   ← 4 tabs

Override Reason  
Override Reason  
Override 0 errors   Delete 0 overrides

Status: All  
Error Type: View All Error Types

\* Resolved errors with no history do not appear in this table

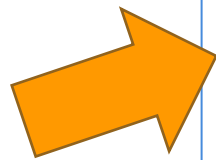
Search: Search error fields   Page 1 of 1   Show 10   Download 3 Results to CSV

<input type="checkbox"/>	SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
<input type="checkbox"/>	900000002		B, Student	WA College Grant award not found in CSAW	Overrideable
<input type="checkbox"/>	900000002		B, Student	Student Id Number must be provided by public schools - the f...	Overrideable



# Editing Student Records – Detail tab, 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) and click Save



Student B (900000002) [◀ Prev](#) [Next ▶](#) [Return to List](#) [Delete](#) [Save](#)

Details Terms On File Errors (3)

Student Information	ISIR WASFA & School Information
First name	Transaction number
Middle name	Rejected
Last name	Student id
SSN or WASFA Id	Year in school ⓘ
Date of birth	<b>Need</b>
Gender	Family income
Is resident	Duration (months)
<b>Ethnicity</b>	COA ⓘ
Hispanic origin	EFC ⓘ
Asian	Need amount ⓘ
Black/african american	<b>Family Information</b>
American indian alaska native	Family size
Native hawaiian/pacific islander	Number in college
White	Is dependent
Other race	Marital status



# Editing Student Records – Terms tab, 3 of 7

- Student “Terms” tab, abbreviated view (shows programs with awards)

- Click/unclick “Show All” box to view/hide full programs list for editing

- Click/unclick lock icon to “lock” and “unlock” list view

Student B (900000002) ◀ Prev Next ▶ [Return to List](#) Delete Save

[Details](#) **Terms** [On File](#) [Errors \(3\)](#)

**Show All**  **Click to lock**

	Summer 1	Fall	Winter	Spring	Summer 2	Total
Enrollment Status	Full time	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 – On File tab, 4 of 7

- Student “On File” tab
- Comparison of student URR data, WSAC program data, and ISIR/WASFA data
- Green checks show data matches
- Red “X” indicates data mismatch needs addressing

Details	Terms	On File	Errors (Resolved)		
CSAW		<b>Program Data</b>	<b>Unit Record</b>	<b>ISIR/WASFA (Trans #1)</b>	
Family Income		\$78,283	\$78,283	\$78,883	✘
Family Size		4	4	4	✔
Number In College		1	1	1	✔
EFC ⓘ			\$3,873	\$11,018	✘
WCG		\$144	\$144		✔
Bridge <input type="text"/>		\$0	\$0		✔
CBS		\$0	\$0		✔
PTC		\$0	\$0		✔
PTC - Incentive		\$0	\$0		✔
Teacher Shortage			\$0		✔
Paraeducator			\$0		✔
ALT			\$0		✔
STG			\$0		✔
National Guard			\$0		✔
WAVE			\$0		✔



# Editing Student Records - Overrides, 5 of 7

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

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

Student B (900000002)    << Prev   Next >>   Return to List    Delete   Save

Details   Terms   On File   Errors (3)

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:    Error Types

\* Resolved errors with no comment history will not appear in this table

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

<input type="checkbox"/>	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
<input checked="" type="checkbox"/>	900000002	B, Student	WA College Grant award not found in CSAW	Overrideable
<input type="checkbox"/>	900000002	B, Student	Student Id Number must be provided by public schools - the f...	Overrideable



# Editing Student Records, 6 of 7

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

\* Resolved errors with no comment history do not appear in this table

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

<input type="checkbox"/> SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
<input type="checkbox"/> 900000002		B, Student	WA College Grant award not found in CSAW	Overridden
<input type="checkbox"/> 900000002		B, Student	Student Id Number must be provide	
<input type="checkbox"/> 900000002		B, Student	WA College Grant amount differs fr	

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

- Or, to view saved Override comment in the Errors list, click green “Overridden” text, and comment appears below Error message. Editable.

<input type="checkbox"/> SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
<input type="checkbox"/> 900000012		B, Student	WA College Grant award not found in CSAW	Overridden

This is a test override



# Editing Student Records, 7 of 7

- Override comments are editable by the original writer **prior** to URR submission and response by WSAC reviewer. New comment required if URR reverted.
- To add comment, select the Error and click “Overrideable” enter, and Save new comment. To Edit, click pencil icon (see previous slide), enter and Save new comment.
- New comments can be edited until URR resubmitted.
- See URR Manual, Chapter 3, page 42, for more detail.

The screenshot displays the 'Override Reason' section with a text input field containing 'This is a test response to the rejection comment'. Below this are two buttons: 'Override 1 errors' (highlighted with a red circle) and 'Delete 0 overrides'. Further down, there are filters for 'Status: All' and 'Error Type: View All Error Types'. A red asterisk note states: '\* Resolved errors with comment history do not appear in this table'. Below the filters is a search bar and pagination controls (Page 1 of 1). A table of errors is shown with columns: Student ID, Name, Error (hover over the error to see the full text), and Overrideable. The first row is selected with a blue checkbox and has an orange arrow pointing to it with the text 'select error'. The error text is 'WA College Grant award not found in CSAW'. The 'Overrideable' column for this row shows 'Overrideable' with an upward arrow and an envelope icon. A second orange arrow points to the 'Overrideable' column with the text 'select Overrideable'. Below the table, two comment entries are visible: one from 8/2/2024, 1:34:32 PM with the text 'This is a test rejection comment', and another from 8/2/2024, 1:31:07 PM with the text 'This is a test override - edited'.



# 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

- Judiciously apply “Bulk” overrides. First, review records to determine if correction is required rather than a Bulk Override comment applied. From Institution Main Errors screen, select the Error Type from dropdown box. Many errors with similar messaging may require an individualized comment.

Override Reason

Override Reason

Override 0 errors Delete 0 overrides

Status: All

Error Type: View All Error Types

\* Resolved errors with no con

Search: Search errors by all

Download 36 Results to CSV

<input type="checkbox"/>	SSN	Student	Overrideable
<input type="checkbox"/>	900000001		Overrideable
<input type="checkbox"/>	900000001		Overrideable
<input type="checkbox"/>	900000001		Overrideable
<input type="checkbox"/>	900000001	A, Student WA College Grant amount differs from CSAW (CSAW: 0; unit rec...	Overrideable



# “Bulk” Override Processing, 2 of 2

- After review, 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 box
- Overrides applied to all checked records. Click “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

\* Resolved errors with no comment history do not appear in this table

Search: Search errors by all fields Page 1 of 1 Show 10 Download 7 Results to CSV

SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
<input checked="" type="checkbox"/>		D, Student	Cost Of Attendance minus EFC does not equal Need	Overrideable
<input checked="" type="checkbox"/>	900000006	E, Student	Cost Of Attendance minus EFC does not equal Need	Overrideable
<input checked="" type="checkbox"/>	900000006	F, Student	Cost Of Attendance minus EFC does not equal Need	Overrideable
<input checked="" type="checkbox"/>	900000007	G, Student	Cost Of Attendance minus EFC does not equal Need	Overrideable
<input checked="" type="checkbox"/>	900000008	H, Student	Cost Of Attendance minus EFC does not equal Need	Overrideable
<input checked="" type="checkbox"/>	900000009	I, Student	Cost Of Attendance minus EFC does not equal Need	Overrideable
<input checked="" type="checkbox"/>	900000010	J, Student	Cost Of Attendance minus EFC does not equal Need	Overrideable




# Search for Existing URR Records for Edit, 1 of 2

Navigate to the “Upload” screen and click “Search Students.”

Upload  Errors Review Submit

Successfully Uploaded

Search Students  Add File Add Record

Students reported to date: 1


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>


Delete All URR Data Download Report Continue

This opens the Search screen, where you can:

- Search for multiple records by adding a comma-separated SSN file (top arrow)
- Search individually (“Search by any field”)

Unit Record Search Go To Report

Search: Search by comma-separated SSN List 

Search: Search by any field  < Page 1 of 1 > Show 10 Download 1 Results to CSV

SSN	Name	Family Size	In College	Family Income	EFC Amount	Need	Year In School
999090050	Doe, John	38					Freshman/1st Year





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

- 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	FA & School Information
First name	Transaction number
Middle name	Rejected
Last name	Student id
SSN or WASFA Id	Year in school ⓘ
Date of birth	<b>Need</b>
Gender	Family income
Is resident	Duration (months)
<b>Ethnicity</b>	COA ⓘ
Hispanic origin	EFC ⓘ
Asian	Need amount ⓘ
Black/african american	<b>Family Information</b>
American indian alaska native	Family size
Native hawaiian/pacific islander	Number in college
White	Is dependent
Other race	Marital status



# Manually Adding Student Records, 1 of 3

- Records may be added from either the “Upload” or “Errors” screen by clicking “Add Record”

Unit Record Errors

36 errors (36 overrideable - 0 must fix - 0 overridden - 0 informational)

Upload  Errors  Review  Submit

**Add Record** **Revalidate**

Override Reason

Override Reason

**Override 0 errors** **Delete 0 overrides**

Status: All

Error Type: View All Error Types

\* Resolved errors with no comment history do not appear in this table

Search: Search errors by all fields Page 1 of 4 Show 10 Download 36 Results to CSV

SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
<input type="checkbox"/>	900000001	A, Student	Summer1 term Enrollment Status cannot be Not Enrolled when S...	Overrideable
<input type="checkbox"/>	900000001	A, Student	WA College Grant award not found in CSAW	Overrideable

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	
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 3

- 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

**Add Unit Record**

Details Terms

Show All

	Summer 1	Fall	Winter	Spring	2	Total
Enrollment Status	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<b>Federal</b>						
Federal Pell Grant	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Federal SEOG	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Federal TEACH Grant	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Federal Nursing Scholarships	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Federal Work Study	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Federal Nursing Health Loans	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Federal Direct Subsidized Loans	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Federal Direct Unsubsidized Loans	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Federal Parent PLUS Loans	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Federal Grad PLUS Loans	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>State</b>						



# Manually Adding Student Records, 3 of 3

- Users generally receive immediate feedback in student's Errors tab if edits needed. Make corrections or enter override comment(s), then "Save."

Student O (009999999) Go to Report Delete Save

[Details](#) [Terms](#) [On File](#) **Errors (6)**

Override Reason  
  
Override 0 errors Delete 0 overrides

Status:   
Error Type:

\* Resolved errors with no comment history do not appear in this table

Search:  < Page 1 of 1 > Show 10

<input type="checkbox"/>	SSN	Student ID	Name	Error (hover over the error to see the full text)	Overrideable
<input type="checkbox"/>	009999999	3849039203	O, Student	WA College Grant award not found in CSAW	Overrideable

- Click "Revalidate" button after returning to the Main Institution Error screen and before proceeding to the "Review" step.

Add a Note or Send us an Email

Upload Errors Review Submit

**Unit Record Errors**  
24 errors (24 overrideable - 0 must fix - 24 overridden - 0 informational)

Add Record Revalidate Continue to Review



# Manually Deleting Student Records

- Find and open the student record from the Errors or the Search screen. (Remember: auto-added records cannot be deleted from the URR.)
- Click “Delete,” and then click “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)    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

- Must use a valid .csv header as top row of file and include complete student record information in each data row.
- Add or delete records or make changes to multiple records simultaneously.
- Mixed types of changes may be included in a single supplemental file.
- If editing existing records, retain full data for the student and edit only fields needing change. File overwrites existing data for affected students.
- Cannot discard Supplemental File after successful upload. Must edit records from the Search or Errors screen(s) or upload a compensating supplemental file. Unsuccessful Supplemental File uploads feature a “Download error file” button to identify/fix errors before attempting revised file upload using “Try Again” button.



## 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	900000014		K	Student	
3	TRUE	900000015		L	Student	
4	FALSE	900000017		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	2
Junior/3rd Year	2
Senior/4th Year	2
Graduate	1
Other	1
<b>Total</b>	<b>10</b>

Delete All URR Data 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 awarded a file (from CSAW or another reporting application)

Download the template [here](#)

3778 Supplemental Test School unit-record-report - 2024-08-01T0 Browse

Cancel Start Upload

Upload Errors Review Submit

Successfully Uploaded

Search Students Add File Add Record

Students reported to date: ⓘ

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

Delete All URR Data Download Report Continue





# Add Notes to URR

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

ⓘ Add a Note or ✉ Send us an Email

Upload ✓ Errors Review Submit

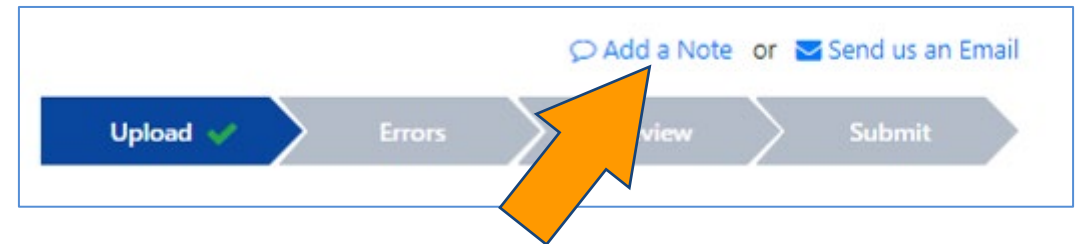
Add a Note

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.

Save Note

History

New Comment - 8/1/2024, 10:28:41 AM  
This is an example of a note.



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



# Review and Submit the URR, 1 of 6

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

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

Upload  Errors  Review  Submit

### Unit Record Errors

43 errors (0 overrideable - 0 must fix - 43 overridden - 0 informational) [?](#)

[Add Record](#) [Revalidate](#) [Continue to Review](#)

Override Reason

Override Reason

[Override 0 errors](#) [Delete 0 overrides](#)

Status:

Error Type:

\* Resolved errors with no comment history do not appear in this table

Search:  [<](#) Page 1 of 5 [>](#) Show 10 [Download 43 Results to CSV](#)

<input type="checkbox"/>	SSN <input type="text"/>	Student ID <input type="text"/>	Name <input type="text"/>	Error (hover over the error to see the full text) <input type="text"/>	Overrideable <input type="text"/>
<input type="checkbox"/>	900000001		A, Student	Summer1 term Enrollment Status cannot be Not Enrolled when S...	Overridden <a href="#">?</a>
<input type="checkbox"/>	900000001		A, Student	WA College Grant award not found in CSAW	Overridden <a href="#">?</a>



# 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 any questions.
- Download PDF for comparison with January 2025 final report.
- 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 any programs missing or unusual patterns present in your totals comparisons. Contact WSAC staff for further advice if you find that to be the case. If everything appears reasonable, confirm the report and continue.

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

Show All

[Download PDF](#)

	2020-2021		2021-2022		2022-2023		2023-2024		% Change	
Federal Aid	Awards	Amount	Awards	Amount	Awards	Amount	Awards	Amount	Awards	Amount
Federal Pell Grant	49	\$169,831	33	\$155,521	47	\$228,168	27	\$5,133	-42.6%	-40.8%
Federal SEOG	1	\$1,000	18	\$13,056	24	\$13,100	12	\$7,100	-50.0%	-45.8%
Federal TEACH Grant	0	\$0	0	\$0	0	\$0	0	\$0	0.0%	0.0%
Federal Nursing Scholarship	0	\$0	0	\$0	0	\$0	0	\$0	0.0%	0.0%
Federal Workstudy	3	\$7,807	6	\$32,260	6	\$23,736	4	\$22,158	-33.3%	-6.6%
Federal Perkins Loan	0	\$0	0	\$0	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

— Select —  
wgc  
cbs  
ptc  
bridge

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: 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	Yes ⓘ
900000047	P, Student		\$3,607	\$8,832	\$5,225	No
900000048	R, Student		\$5,520	\$7,728	\$2,208	Yes ⓘ

- “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 will reach out to resolve questions about the differences before the URR is finalized.
- After addressing Differences Reports reviews for all four programs (WCG, CBS, Passport, and Bridge), 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

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

[Return to Report Summary](#)

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!

The image shows a sequence of three screenshots from a web application. The first screenshot shows a progress bar with 'Upload', 'Errors', and 'Review' steps marked with green checkmarks, and a 'Submit' button. Below the progress bar, the text reads 'Ready To Submit?' followed by an information icon and a paragraph: 'If all errors and differences have been addressed, and your Program Totals Report appears reasonable, click submit.' A blue 'Submit' button is visible. An orange arrow points from the 'Submit' button in this screenshot to the 'Confirm' button in the second screenshot. The second screenshot shows the same progress bar, but the 'Submit' button is now a 'Confirm' button and a 'Cancel' button. The text below is partially obscured but includes 'Ready To Submit?' and 'If all errors and differences have been addressed, and your Program Totals Report appears reasonable, click submit.' An orange arrow points from the 'Confirm' button in this screenshot to the 'Successfully Submitted' message in the third screenshot. The third screenshot shows the progress bar with all four steps ('Upload', 'Errors', 'Review', 'Submit') marked with green checkmarks. The main heading is 'Successfully Submitted' with an information icon, circled in red. Below this, it says 'The following reports present a summary analysis of the Unit Record data for your institution.' A 'Please note' section follows: '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 provided: 'Demographic Distribution Reports', 'Program Totals Report', 'WCG, CBS & Passport Differences', and 'Profile Reports'. An orange arrow points from the 'Successfully Submitted' heading to the 'Please note' section.

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

Upload ✓ Errors ✓ Review ✓ Submit

Ready To Submit? ⓘ

Confirm Cancel

Successfully Submitted ⓘ

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](#)



# “Point-in-time” URR Data File Downloads

- Full URR “point-in-time” data file downloads are available on the “Upload” screen (Data file downloads from the Search screen are abbreviated, incomplete data files.)
- Constitutes full URR file in the Portal, with all edits saved through the 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, history.

Upload ✓ Errors ✓ Review ✓ Submit ✓

Successfully Uploaded ✓

Search Students

Students reported to date: ⓘ

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

Download Report Continue





# Reports Available After Submission

- Reports (blue font) available from the Submit screen immediately after submission include:
  - Demographic Distribution Reports
  - Program Totals Report (Preliminary)
  - WCG, CBS & Passport Differences Reports (includes Bridge Grant Differences Report)
- Profile Reports available January 2025
  - Need-Based Aid Recipients
  - State Work Study Recipients
  - WA College Grant Recipients
  - College Bound Scholarship Recipients

3778 - Test School 2023-2024

Add a Note or Send us an Email

Upload ✓ Errors ✓ Submit ✓

Successfully Submitted ✓

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

Questions?

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

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

- Contact FA 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>

- Select Ticket Category: ctcLinkSupport > Financial Aid > FA:URR



# Where to go for help – WSAC URR Portal Issues

- Review the 2023-24 URR Manual, available online at:  
<https://www.wsac.wa.gov/unit-record>
- Contact WSAC Unit Record Report team at:  
[unitrecord@wsac.wa.gov](mailto:unitrecord@wsac.wa.gov)

<b>Ann Voyles</b>	<b>Marla Skelley</b>
360-485-1311	360-485-1320
<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>