WASHINGTON STUDENT ACHIEVEMENT COUNCIL

EDUCATION · OPPORTUNITY · RESULTS

UNIT RECORD REPORT MANUAL

2025-26 ACADEMIC YEAR

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UNIT RECORD REPORT

Contact Information

MANAGEMENT/POLICY ISSUES		
SHANNON VENEZIA, PH.D. Director of Student Financial Assistance	Phone Email	(360) 485-1065 shannonv@wsac.wa.gov
MARLA SKELLEY Associate Director for Compliance	Phone Email	(360) 485-1320 marlas@wsac.wa.gov

TECHNICAL ASSISTANCE		
ANN VOYLES Program Associate	Phone Email	(360) 485-1311 annv@wsac.wa.gov

Washington Student Achievement Council

1500 Jefferson Street SE
P.O. Box 43430
Olympia, WA 98504-3430
www.wsac.wa.gov

Secure Portal: https://portal.wsac.wa.gov/

Secure Training Portal: https://portaltraining.wsac.wa.gov/

Unit Record Email: unitrecord@wsac.wa.gov

Agency Phone: (360) 753-7800

Unit Record Report Manual
Overview and Updates

OVERVIEW

The Unit Record Report (URR) is a student-specific report of financial aid awarded to resident and nonresident students attending the Washington institutions that participate in the Washington College Grant (WCG, formerly known as the State Need Grant) program. It provides comprehensive information on federal, state, private, and institutional financial aid distributed to need-based financial aid recipients. The report also includes information about aid distributed to students who receive non-need-based aid administered by WSAC and/or these non-need-based federal loan programs: Federal Direct Unsubsidized Loans, Federal Parent PLUS Loans, and Federal Grad PLUS Loans.

Unit Record Report History

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

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

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

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

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

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

Unit Record Report Uses

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

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

Data from the URR are used to:

- Provide financial aid data to the Education Research and Data Center (ERDC). These data, in combination with academic and workforce records, may be used by WSAC staff and other researchers to conduct longitudinal research on the educational and occupational achievements of financial aid recipients.
- Analyze the adequacy of financial aid resources available to financially needy Washington students.
- Describe funding trends and the characteristics of students receiving various types of financial assistance.
- Estimate funding needs and support budget requests for state-funded financial aid programs.
- Estimate the impact of new financial aid programs, changes in program policies, and altered funding levels.
- Contribute to student financial aid policy analysis and program evaluation.
- Respond to legislative requests for information about student financial aid programs available to Washington students.

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

Use of Unit Record Report for Research Purposes

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

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

Data-sharing agreements have been developed to permit sharing of URR data to the P-20W warehouse at OFM on behalf of the institutions.

CHANGES OR EMPHASIS IN 2025-2026 UNIT RECORD REPORT

The list below details the changes in field or record requirements in the 2025-2026 URR. For additional guidance and instructions for these fields, see Chapter 2: Data Definitions; and Appendix B: Record Layout, unless otherwise indicated. Also noted are selected new features of the URR Portal.

- **Non-Need Based Recipients of WSAC-administered programs**. Report all recipients of WSAC-administered programs, including those who received only non-need based aid; e.g., WAVE.

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

    - Revised Field Header lay-out:
        - WGA replaces outdated field header title WCGApprenticeship. Field activated beginning 2025-26 for data collection.
        - WABridge is retained in the Field Header lay-out but data is no longer collected beginning in 2025-26
        - BehavioralHealthConditionalScholarship is a newly active Field Header for which data will be collected for 2025-26
        - SubstanceUseDisorderProfessionalGrant is retained in the Field Header lay-out but data is no longer collected beginning in 2025-26
        - WSOSPromiseScholarship is a new reporting category beginning with the 2025-26 URR
        - EmergencyAid is a new reporting category in the Field Header

    - New programs added to Field Header:
        - WSOSPromiseScholarship
        - EmergencyAid

- SPEEA (Society of Professional Engineers in Aerospace) Tuition Assistance Grant - This is a one-year pilot program for 2025-26 only. A separate reporting field has not been established for this program in the field header. Report these recipient awards in the OtherAgencyAssistance field. Create a URR "Add a Note" and enter the program name (SPEEA Tuition Assistance Grant), amount awarded, and recipient head count in the Note for WSAC review of this award.

- Change in **valid input range** before errors are produced:
    - WACollegeGrant (WCG) – Valid input range is 0 to 18431 (formerly 0 to 17835)
    - WGA – Valid input range is 0 to 4923 (formerly 0)
    - WABridge – Valid input range is 0 (formerly 0 to 500)

- CollegeBoundScholarship (CBS) – Valid input range is 0 to 19181 (formerly 0 to 6180)
- PassporttoCollegeScholarship (PTC) – Valid input range is 0 to 3100 (formerly 0 to 4200)
- BehavioralHealthConditionalScholarship – Valid input range is 0 to 25500 (formerly 0. New program beginning 2025-26)
- SubstanceUseDisorderProfessionalGrant – Valid input range is 0 (Program awards only in 2024-25)
- WSOSPromiseScholarship – Valid input range is 0 to 10000 (New program beginning 2025-26)
- SBCTCOpportunityGrant – Valid input range is 0 to 10378 (formerly 0 to 10120)
- EmergencyAid – Valid input range is 0 to 10000 (new field beginning 2025-26)

- **New Error Codes (See Appendix C for full Error list.):**

  - ISIRWASFA Transaction Number doesn't match the transaction number reported in CSAW
  - Total Aid exceeds Cost of Attendance
  - Total WGA is outside the expected range
  - WGA recipient is not a state resident
  - Total reported WGA amount Differs from Awards on File
  - WGA Award Not Found in Awards on File
  - Total WSOS Promise Scholarship Outside Expected Range
  - WSOS Promise Scholarship recipient is not a state resident
  - Total Behavioral Health Conditional Scholarship is outside expected range
  - Behavioral Health Conditional Scholarship recipient is not a state resident
  - Total reported Behavioral Health Conditional Scholarship Amount Differs from Awards on File
  - Behavioral Health Conditional Scholarship Award Not Found in Awards On File
  - Total Emergency Aid outside expected range

- **Appendix A** (pgs. 76-77) – Under fourth column *Non-Need Based Other Programs* (light peach highlight), response to "*What recipients should be reported?*" is revised to read: "***Only report recipients who have need-based aid or admin. by WSAC***."

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

  By using the training environment, institutions may identify corrections that must be made to the data file before attempting to upload the file to the live URR Portal site. The training website is located at:

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

EARLY ANNOUNCEMENT: CHANGES UNDER CONSIDERATION FOR 2026-27 UNIT RECORD REPORT

These are the anticipated changes for the 2026-27 Unit Record Report Manual that the URR Team is aware of at this time:

- The Washington State GEAR UP (WAGU) Scholarship program will be added to the 2026-27 header lay-out file. Additional reporting details for these $1,000 awards will be provided at that time.

- The Enrollment Intensity fields will be revised in the 2026-27 URR to align with similar changes taking place in the Interim Reporting and CSAW. (See the 2026-27 WCG and CB Manual for examples of amended range descriptors and rounding of partial credits on pages 66 – 29, and page 86 regarding clock hour school calculations.)

Potential for addition of new state-funded aid programs as enacted by the Legislature for the reporting year. Specific details will be announced when known.

UNIT RECORD REPORT 2025-2026 TIMELINE

Late July 2026:	Portal Training secure website application available for test file upload and practice of URR features.
August 2026:	Unit Record Report training webinars and online tutorial sessions. See the Unit Record Report page on the WSAC agency website for webinar details.
August 10, 2026:	Unit Record Report Application available for initial upload of data into WSAC's live URR Secure Portal.
October 19, 2026:	**Unit Record Report submission final due date.**
October/January 2027:	WSAC staff data review and editing.
January 2027:	Unit Record Report data finalized.
February 2027:	Unit Record Report 2025-2026 Institutional Profile reports available.

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

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

Due Date for Unit Record Report: October 19, 2026

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2025-2026 ACADEMIC YEAR
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CHAPTER 1 – GENERAL INSTRUCTIONS

Students to be Included

Need-Based Recipients

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

Appendix A identifies the financial aid programs and aid types WSAC considers as need-based for the URR. Further, the programs are differentiated by whether 2025-26 Free Application for Federal Student Aid (FAFSA) or Washington Application for State Financial Aid (WASFA) data are required to be submitted:

- **Need-Based Recipients (FAFSA or WASFA required):** All 2025-26 FAFSA or WASFA data must be reported for all students receiving any aid shown in Appendix A as "Need-Based (FAFSA or WASFA data required)."

- **Need-Based Recipients (FAFSA or WASFA optional):** If available, all 2025-26 FAFSA or WASFA data must be reported for all students receiving any aid shown in Appendix A as "Need-Based (FAFSA or WASFA data optional)."

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

Non-Need Based Federal Loan Recipients

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

Non-Need Based Recipients of WSAC-administered programs

Submit one record for each student at your institution who received non-need based aid from a WSAC-administered program but no other need-based aid; for example, WAVE.

Reporting Period

Report financial aid disbursed during the 2025-26 academic year. For need-based recipients this will include all academic and summer terms for which 2025-26 FAFSA or WASFA data are used. Aid reported may include summer 2025 funding and/or summer 2026 funding. You will find included in Chapter 2 specific information regarding which summer aid term(s) to report.

Information To Be Reported

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

Reporting Application

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

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

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

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

General File and Data Formats

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

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

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

All numbers provided must be positive numbers or zero '0,' with the exception of the Student Aid Index (SAI) field only. Negative numbers are accepted in the SAI field, as necessary.

Uploading the CSV File

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

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

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

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

Testing the Upload File

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

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

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

Profile Reports

After the URR team has reviewed and finalized data from each institution, WSAC will release the 2025-26 profile reports to each institution via the URR application. Profile reports provide descriptive and summary statistics by state, sector, and institution for students who received need-based aid. Profile reports generally are made available in January.

CHAPTER 2 – DATA DEFINITIONS

Before You Begin

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

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

Required Fields for All Recipients:

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

General and Demographic Information

IsDelete

The "IsDelete" field is used to delete one or more student records from the URR after an initial URR file upload has already taken place. Its purpose is to mark those records that are to be deleted from the URR during a subsequent supplemental (partial revision) file upload. For details regarding the supplemental file upload process, see Chapter 3, page 59. The default entry for the "IsDelete" field in the initial URR file upload is "N," "No," "False," or left blank (not zero). Entry of "Y," "Yes," or "True" in this field will delete the student record from the URR, except in instances that a "missing" record has been auto-added to the URR.

SSN

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

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

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

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

Institution Student ID

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

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

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

Last Name

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

First Name

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

Middle Name

Student's middle name or initial.

Date of Birth

Report date of birth using standard numerical U.S. date format: mm/dd/yyyy. The date should be in the range of 01/01/1951 to 12/31/2011. **NOTE:** 01/01/1982 (leading zeroes for month and day) and 1/1/1982 (no leading zeroes for month and day) are both acceptable formats. This is a required field when reporting FAFSA-based (and WASFA) aid types.

Gender

Report one of the following codes:

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

Is State Resident

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

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

Report one of the following codes:

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

Year in School (Click here to return to Contents)

Report the student's status as of the beginning of the term for which the last financial aid disbursement was made for the 2025-26 URR year. This is from the institution's official records. Do not use FAFSA or WASFA to populate this field.

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

Example 2: Student was classified as a freshman at the beginning of the last term for which a 2025-26 disbursement was made. After this term was completed, the student earned enough credits to enroll as a sophomore for the next term. Report this student as a '1' or 'freshman/1st year'.

Report one of the following codes:

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

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

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

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

Include students who are in the second year of an applied bachelor's program if they have completed an associate degree program.

'5' or 'Unclassified/5th Year' – Students who hold a bachelor's degree and were not enrolled in a program leading to a graduate degree (master's or doctoral) or a graduate-level certificate. Include students who are working on a second bachelor's degree. Also, include students with a bachelor's degree who are getting an associate degree. Use code '8' to count non-matriculated students without a bachelor's degree.

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

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

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

Race/Ethnicity

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

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

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

Is of Hispanic Origin

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

Yes: 'y' or 'true'

No: 'n' or 'false'

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

Is Race American Indian or Alaska Native

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

Yes: 'y' or 'true' No: 'n' or 'false'

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

Is Race Asian

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

Yes: 'y' or 'true'

No: 'n' or 'false'

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

Is Race Black or African American

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

Yes: 'y' or 'true'

No: 'n' or 'false'

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

Is Race Native Hawaiian or Pacific Islander

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

Yes: 'y' or 'true'

No: 'n' or 'false'

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

Is Race White

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

Yes: 'y' or 'true'

No: 'n' or 'false'

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

Is Race Other

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

Yes: 'y' or 'true'

No: 'n' or 'false'

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

FAFSA, WASFA, and Need-Related Fields

The following additional fields are required for need-based aid recipients with a 2025-26 FAFSA or WASFA on file.

- ISIR or WASFA Transaction Number
- Rejected ISIR WASFA
- Student Aid Index (SAI)
- Cost of Attendance (COA)
- Need Duration
- Need Amount

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

After finalizing the URR, WSAC will delete unnecessary FAFSA or WASFA non-aid related data from all non-need-based loan recipient records.

ISIR WASFA Transaction Number

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

Rejected ISIR WASFA

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

Valid inputs are:

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

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

'Y' or 'true' means that the individual does not have a valid ISIR or WASFA on file (rejected status), or that no FAFSA or WASFA was filed, **AND** the student was awarded only non-need-based aid during the academic year as a result.

- Records marked with a 'y' or 'true' in this field will trigger an error if the student received need-based aid.

- The Need Duration, COA, SAI, and Need Amount fields must be left blank (not '0') if the Rejected ISIR WASFA field is marked 'y' or 'true.'

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

Reporting Items in the Need Equation

Information reported in the four fields that follow may be reported based on the information available at the time of the recipient's first financial aid disbursement during the 2025-26 year. This applies to full year awards made at the beginning of the academic year when students opt not to attend all terms.

- Cost of Attendance
- Student Aid Index (SAI)
- Need Duration
- Need Amount

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

> ***Example 1:*** Student enrolled is expected to enroll for a nine-month academic year. Report all four fields on that basis.
>
> ***Example 2:*** Student originally was expected to enroll for a nine-month academic year. The student, however, did not return to school after the fall term. In this case, the institution may decide either to:
>
> A. Not make any changes to these four fields. Report enrollment status and financial aid disbursement amounts accurately for all terms.
>
> or,
>
> B. Adjust all four fields to align with the actual term-by-term enrollment status. This option may trigger an Overaward situation if award values are not adjusted in recognition of budget changes due to dropped/withdrawn terms before final interim reporting and reconciliation at fiscal year-end. Please see WSAC official guidance dated July 15, 2024 regarding proration of COA and SAI for periods of enrollment other than nine months for state aid programs, under the 2024-25 Program Guidance Archive caption at wsac.wa.gov/FAA-resources.
>
> **NOTE:** If applying an adjustment to one student, the school must consistently apply the adjustment for all students.

Cost of Attendance

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

NOTE: Include the full-assessed tuition amount to calculate and report in the URR the true Cost of Attendance (COA) for recipients of WCG, CBS, and other need-based assistance. The

full-assessed tuition amount is what the student is, or would be, assessed before any tuition waiver(s) have been applied. This formula is required for the 2025-2026 URR. See the 2025-2026 Washington College Grant/College Bound Scholarship program manual, Chapter 2, page 36, Cost of Attendance (COA) and Tuition Waivers.

Student Aid Index (SAI)

The Student Aid Index (SAI) usually will be the Federal Methodology (FM) calculation produced by the U.S. Department of Education based on the 2025-26 FAFSA or a WASFA (uses a FAFSA-like computation but is not processed through the US Department of Education). If a financial aid administrator has made a professional judgment decision to adjust the FM SAI, they must submit those corrections through either the federal processor or through the WASFA and then report the adjusted SAI amount as calculated on the FAFSA or WASFA. This should be consistent with the number of months reported in the Need Duration. This is a required field if reporting any of the following other items for a student: Family Income, Need Amount, or Need Duration.

If the Student Aid Index (SAI) is a negative number, report the SAI in the URR as a negative integer. Negative SAI is treated as a zero in the Need formula calculation.

NOTE: If an institution also calculates an Institutional Methodology (IM) Student Aid Index (SAI) that differs from the FM SAI, report the FM rather than the IM amount as the SAI.

NOTE: The full FM SAI must be reported in the SAI field as required by federal regulations in the Need calculation. However, professional judgement decisions that prorate the COA and SAI for enrollment periods longer or shorter than 9 months to determine eligibility for state aid must be documented by including the IM calculation and the prorated COA/SAI figures in the Override comment for those awards. (See "2024-25 Official Guidance on Proration of COA and SAI" dated 07/15/2024 in FAA Resources, Program Guidance Archive tab at https://wsac.wa.gov/FAA-resources.) If applying this adjustment to one student, it must be consistently applied to all students.

For Dependent Students: Base the Student Aid Index on the information reported by the student and the student's parent(s) on the FAFSA or WASFA.

For Independent Students: Base the Student Aid Index on the information reported by the student and the student's spouse, if applicable, on the FAFSA or WASFA.

Need Duration

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

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

Need Amount

The amount of need used to determine the student's eligibility. This should equal the Cost of Attendance (COA) minus the Student Aid Index (SAI). This is a required field if reporting

any of the following other items for a student: Family Income, Student Aid Index (SAI), or Need Duration.

Cost of Attendance (COA) minus Student Aid Index (SAI) equals Need Amount

Report negative Student Aid Index (SAI) as a negative integer in the SAI field. Negative SAI is treated as a zero ('0') in the Need calculation shown above. [Example: 20000 COA – (- 1500 SAI = 0) = 20000 Need Amount]

If the Need calculation results in a negative Need Amount, report the Need Amount as zero ('0'). Negative Need Amounts are invalid and will trigger an Error that must be corrected. [Example: 20000 COA – 25000 SAI = 0 Need Amount]

Overaward Reminder: All aid counts toward Need if the student received at least one dollar of need-based aid. Limited exceptions (OFA) may count toward replacing the value of the Student Aid Index (SAI), such as Direct Unsubsidized and PLUS Loans. This is not true for all non-need-based aid. For example, Non-need-based gift aid does not replace SAI, and does count towards Need. [Example: Cost minus SAI minus OFA* exceeds Need Amount = Overaward].

* Other Financial Assistance (OFA), as defined in federal regulations

Reporting Term Enrollment and Financial Aid for Five Terms

Report enrollment and financial aid received on a term-by-term basis. When preparing the CSV file, follow the sample file format, which replaces the word 'Term' with 'Summer1,' 'Fall,' etc. for all fields for all five terms.

- Summer1
- Fall
- Winter
- Spring
- Summer2

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

For some institutions, the academic year may cover the July 2025–June 2026 timeframe. For others, it may more closely represent the dates of August 2025–July 2026. In most cases, it will not exceed 12 months. If you are reporting assistance for students who did not submit a FAFSA or WASFA, use the same timeframe for these students as you use for FAFSA or WASFA filers.

NOTE: The URR checks to ensure that a positive enrollment status (any status except for '0 credits') is reported for each term that aid was reported on a student record, excepting certain work programs (e.g., State and Federal Work Study, and work force training funds, which allow for payment during a non-enrolled term, such as Summer). This error is overrideable.

Quarter and Semester Term Institutions

Most institutions will use either the Summer1 term or the Summer2 term, but not both. For the term that is not used, '0' credits should be input for the term enrollment status.

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

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

Each institution with a **summer enrollment** period (typically between May and August) should report summer aid disbursements as a "leader" institution or as a "trailer" institution based on federal program rules. Institutions should report financial aid disbursed under "leader" rules as 'Summer1' assistance. Institutions should report financial aid disbursed under "trailer" rules as 'Summer 2' assistance. If an institution has more than one summer term during the same summer, combine and report the financial aid and term enrollment status as a single summer term.

> ***Example 1:*** A student at a "trailer" institution received financial aid for two short summer sessions in 2026, based on the 2025-26 FAFSA or WASFA. The student received financial aid for 6.00 credits the first summer session (mid-May to late June) and received financial aid for another 6.00 credits the second summer session (early July to mid-August). Report all aid as 'Summer 2' with the student's enrollment status as '12' credits. 'Summer1' enrollment and all financial aid fields will be '0' credits.
>
> ***Example 2:*** A student at a "header" institution received financial aid for the summer 2025 term based on the 2025-26 FAFSA or WASFA. At the time of the URR submission, the student also received financial aid for the summer 2026 term (based on a 2026-27 FAFSA or WASFA). Report aid received during the summer of 2025 as 'Summer1'. Report 'Summer2' enrollment status and corresponding financial aid fields as '0' credits. (Note: In this case, report the 2026 summer enrollment and aid received on the 2026-27 URR.)

Combination of leader and trailer awards: If your institution awarded some programs under leader rules and other programs under trailer rules, report leader awards in Summer1 and report trailer awards in Summer2.

Continuous Enrollment Credit Hour Institutions and Clock-Hour Institutions

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

The terms and dates reported should be consistent with the information reported for WCG in the CSAW portal application for the 2025-26 year.

Term Date Ranges for Clock-Hour Institutions

These reflect the same date ranges that appeared in the 2025-26 WCG/CBS manual.

Term	From	To
Summer 1	July 1, 2025	September 11, 2025
Fall	September 12, 2025	November 22, 2025
Winter	November 23, 2025	February 5, 2026
Spring	February 6, 2026	April 18, 2026
Summer 2	April 19, 2026	June 30, 2026

Term Enrollment Status

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

Undergraduate Enrollment Status: Use the following codes for reporting enrollment intensity status by number of undergraduate credits or scheduled clock hours per term. Report 0 for Not Enrolled, integers for whole credits between 1 – 30 (may use decimals), and partial credit increases in increments of 0.25 above 3 credits. For example, 0, 1 (or 1.00), 2 (or 2.00), 3 (or 3.00), 3.25, 3.50, 3.75, 4 (or 4.00), and so on, up to 30.00 credits maximum. May include the word "credits," but is not required.

Undergraduate Enrollment Status	Credits	Scheduled Clock Hours	URR Codes
Not Enrolled	n/a	n/a	0
Full-Time	12 or more	300 or more	12 – 30
Three-Quarter Time	9–11	225–299	9 - 11.75
Half-Time	6–8	150–224	6 - 8.75
Less Than Half-Time	Less than 6	Less than 150	1 - 5.75

Graduate Student Enrollment Status: Report graduate student enrollment using the actual number of graduate credits enrolled per term. Report 0 for Not Enrolled, integers for whole credits between 1 – 30 (may use decimals), and partial credit increases in increments of 0.25 above 3 credits. For example, 0, 1 (or 1.00), 2 (or 2.00), 3 (or 3.00), 3.25, 3.50, 3.75, 4 (or 4.00), and so on, up to 30.00 credits maximum. May include the word "credits," but is not required.

Reporting of Financial Aid Received

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

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

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

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

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

Federal Aid Programs

Federal Pell Grant

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

Federal SEOG

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

Federal TEACH Grant

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

Federal Nursing Scholarships

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

Federal Work Study

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

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

There are two options for reporting work study earnings:

> ***Actual Term Earnings:*** Institutions may report actual gross term earnings based upon monthly cutoff dates or institutional payroll dates. For example, a semester institution may report all September–December earnings as fall term aid and

January–May earnings as spring term aid (with '0' reported for winter aid). Quarter institutions may report September–December earnings for fall term, January–March earnings for winter term, and April–June earnings for spring term.

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

Federal Nursing Health Loans

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

Federal Direct Subsidized Loans

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

Federal Direct Unsubsidized Loans

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

Federal Parent PLUS Loans

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

Federal Grad PLUS Loans

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

State Aid Programs

WA College Grant (WCG)

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

WGA (WA Grant Apprenticeship)

The amount of WGA funds received by the student attending approved, participating programs at select community or technical colleges. Colleges administering WGA with a participating sponsor for 2025-26 are: Bates Technical College; Columbia Basin College;

Everett College; Renton Technical College; South Seattle College; and Spokane Community College. The amount reported will be compared to WSAC's internal WGA records.

WA Bridge

Program funding suspended effective 2025-26. Report no recipient awards in this program category for 2025-26.

College Bound Scholarship (CBS)

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

Passport to College Scholarship

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

For example, if the student received a $3,100 Passport to College Scholarship and a $500 incentive grant payment, the institution should report on the URR that the student received $3,100 in the Passport to College Scholarship field and separately report $500 in the Passport to College Incentive Grant field. Do not report these two award types as a combined program amount. The amount reported as Passport to College Scholarship normally should be the same amount reported in CSAW for PTC.

Passport to College Incentive Grant

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

For example, if the student received a $3,100 Passport to College Scholarship and a $500 incentive grant payment, the institution should report the $500 incentive grant portion in the Passport to College Incentive Grant field.

National Guard Grant

The amount of National Guard Grant funds received by the student. The National Guard Grant awards reported are matched to the program Portal payment system.

WAVE (Washington Award for Vocational Excellence)

The amount of Washington Award for Vocational Excellence (WAVE) funds received by the student. The WAVE awards are matched to the program Portal payment system .

Alternative Routes for Teaching Certification

The amount of state funded Alternative Routes received by the student. There is potential for loan repayment if required conditions are unmet. Formerly reported as TeacherConditionalScholarshipPrograms.

Paraeducator (also known as Pipeline for Paraeducators Conditional Scholarship)

The amount of state funds received by the student for the Pipeline for Paraeducators program. There is potential for loan repayment if required conditions are unmet. Formerly reported as TeacherConditionalScholarshipPrograms.

Teacher Shortage Conditional Scholarship

The amount of Teacher Shortage Conditional Scholarship funds received by the student. There is potential for loan repayment if required conditions are unmet. Formerly reported as TeacherConditionalScholarshipPrograms.

Teacher Grant Programs

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

Behavioral Health Conditional Scholarship

The amount of Behavioral Health Conditional Scholarship funds received by the student. Award disbursements in this program began fall 2025 of the 2025-26 academic year.

Substance Use Disorder Professional Grant

Program funding was suspended effective 2025-26. Report no recipient awards in this program category for 2025-26.

WSOS BA Scholarship (formerly Opportunity Scholarship)

The amount of WSOS BA Scholarship funds received by the student. This program originally was known as the Washington State Opportunity Scholarship.

WSOS Career Technical Scholarship

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

WSOS Graduate Scholarship

The amount of WSOS Graduate Scholarship funds received by the student.

WSOS Promise Scholarship

The amount of WSOS Promise Scholarship funds received by the student.

SBCTC Opportunity Grant

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

Other State Funded Gift Assistance

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

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

On-Campus State Work Study

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

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

There are two options for reporting work study earnings:

> ***Actual Term Earnings:*** Institutions may report actual gross term earnings based upon monthly cutoff dates or institutional payroll dates. For example, a semester institution may report all September–December earnings as fall term aid and January–May earnings as spring term aid (with '0' reported for winter aid). Quarter institutions may report September–December earnings for fall term, January–March earnings for winter term, and April–June earnings for spring term.
>
> ***Average Term Earnings:*** Institutions may report average gross term earnings over the academic year for all terms for which the student had an Enrollment Status of half-time or higher. For example, if a student received $3,261 in earnings at a semester institution over the course of an academic year, that could be reported as $1,631 fall term earnings and $1,630 spring term earnings.

Off-Campus State Work Study

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

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

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

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

WorkForce Training Funds

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

Institutional Aid Programs

Need-Based Institutional Gift Aid

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

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

- For WCG and CBS recipients, report all need-based tuition waivers in this category of the URR. The institution must ensure that student COAs reported include the true cost of tuition (that is, the full assessed tuition amount before the waiver is applied). This data is required for the 2025-26 URR.
- For recipients of other need-based aid who did not receive WCG or CBS, report any need-based tuition waiver(s) in this category of the URR and, whenever possible, the full-assessed tuition amount is to be included in the COA.

Non-Need Based Institutional Gift Aid

The amount of institutional scholarships, grants, and/or waivers received by the student not based on a review of the 2025-26 FAFSA, WASFA, or other need determination.

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

- For WCG and CBS recipients, report all non-need-based tuition waivers in this category of the URR. The institution must ensure that the student's reported COA includes the true cost of tuition (that is, the full assessed tuition amount before the waiver is applied). This data is required for the 2025-26 URR.
- For recipients of other need-based aid who did not receive WCG or CBS, report any non-need-based tuition waiver(s) in this category and, whenever possible, the full-assessed tuition amount is to be included in the COA.
- Do not report in the URR a student who received non-need-based tuition waiver(s) but did not receive any need-based financial assistance.

Institutional Employment

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

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

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

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

Institutional Loans

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

Emergency Aid

The amount of emergency aid received by the student. Identify the type of emergency aid the student received in the override comment field.

Other Financial Aid Programs

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

Conditional Loans

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

Private Loans

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

Other Loans

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

Outside Scholarships

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

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

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

VA Benefit

Report in this field the amount of Veterans waivers or benefit programs received by the student that reduce cost of attendance (COA). Veterans programs that do not affect the need calculation (i.e., Chapter 31 and 33) are not reportable.

Other Agency Assistance

The amount of scholarships and grants received by the student from other agencies or government sources not reported elsewhere. Enter the type of aid the student received in the override comment field.

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

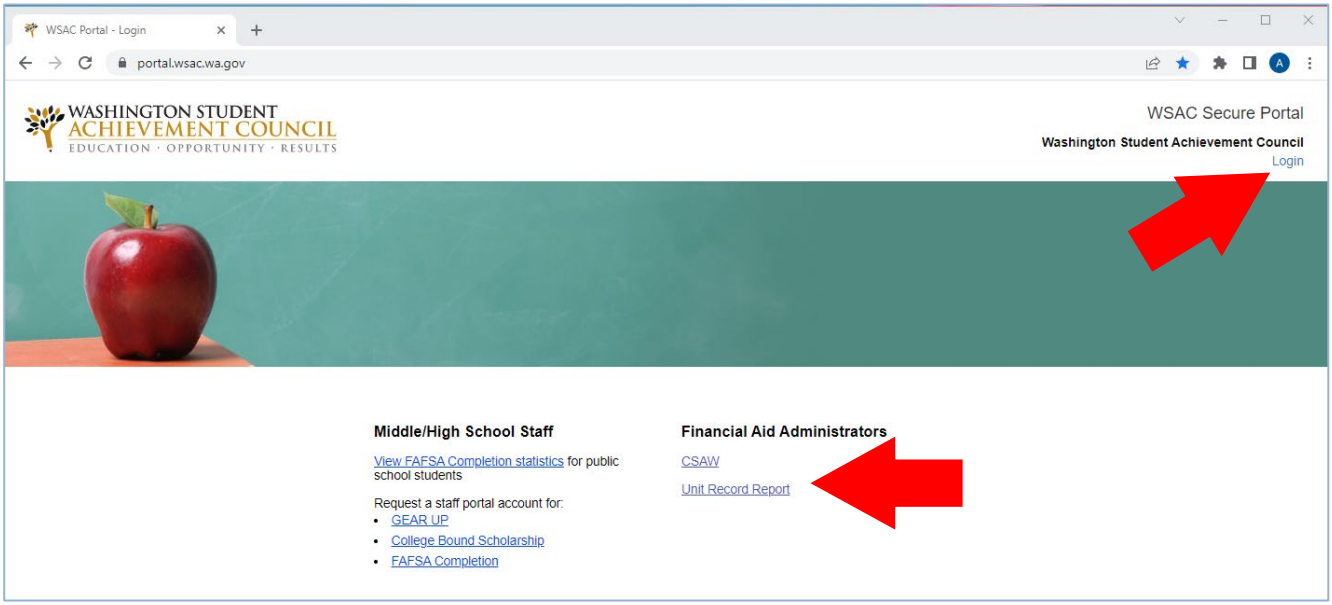
CHAPTER 3 – REPORTING APPLICATION USER'S GUIDE

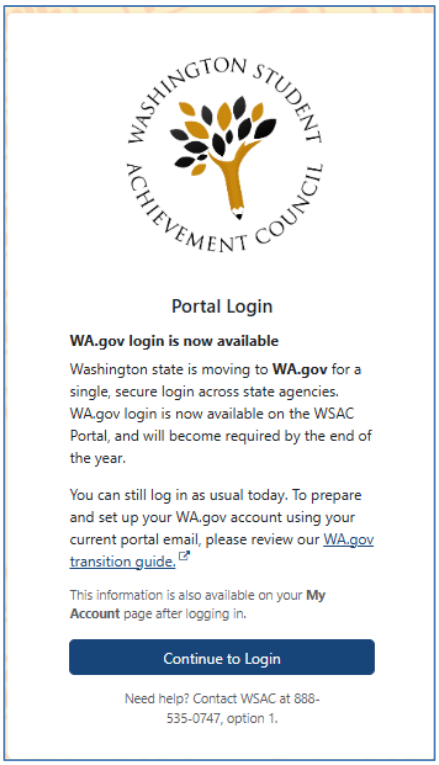
This section provides instructions for the Portal-based URR 3.0 application used to create and submit your institution's URR to WSAC.

Portal Log-In and Two-Factor Authentication

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

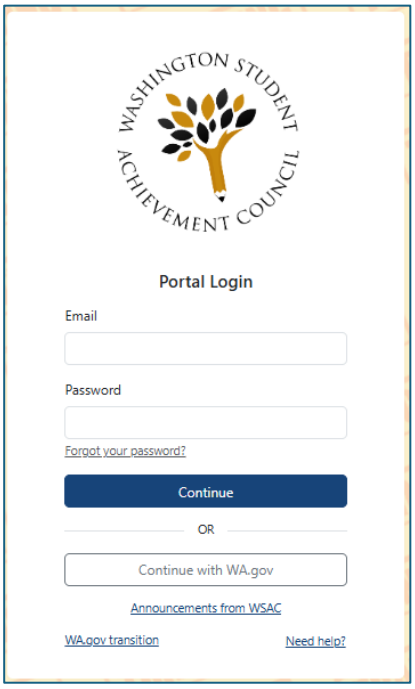
Click "Login" or click "Unit Record Report" under the Financial Aid Administrators heading. If you do not have access to the Portal, contact WSAC staff at unitrecord@wsac.wa.gov.





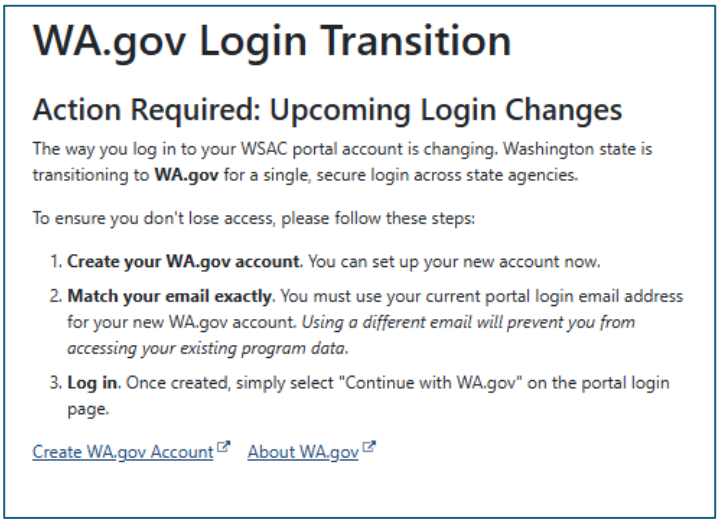
Users will receive notice that WSAC is moving to a single, secure login process used across state agencies. The WA.gov login is now available for creation and use on the WSAC Portal. It is not required at this time, and Users are able to login to the Portal using their current login ID and password. Creating the WA.gov login will be required to access the Portal by the end of the year.

Click "Continue to Login."

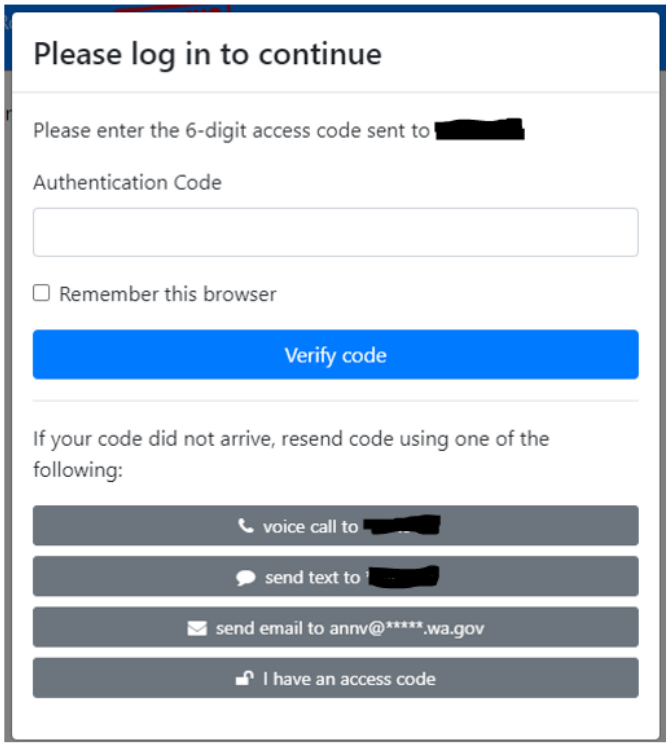


The updated Login screen will pop-up, providing the User with the option to enter their current Username and Password and click "Continue," OR continue to the state WA.gov login creation page.

Clicking the "WA.gov transition" link will open additional information about the transition process:



Users who choose to continue using their current login ID and password instead of creating the WA.gov ID may encounter the secondary screen, below, which asks for an authentication code. WSAC uses two-factor authentication as a security feature before Users can log into the system, if opting not to create a WA.gov account at this time.



The authentication code is sent to the User's authorized email address (more later about changing this). Retrieve the code from your email box, enter the authentication code in the field provided, click "Remember this browser," and then "Verify code." If the email containing the code doesn't appear in your mailbox, check your "Junk" or "Spam" folder.

Clicking the "Remember this browser" box permits the Portal to retain the User's authentication for 36 hours. That allows the User to log in and out without the need to reauthenticate during that 36-hour time period.

After five failed login attempts, the Portal will lock out the User for a set period of time. Wait 15 minutes before attempting another login. If still unable to log in after 15 minutes, contact WSAC URR staff for a password reset.

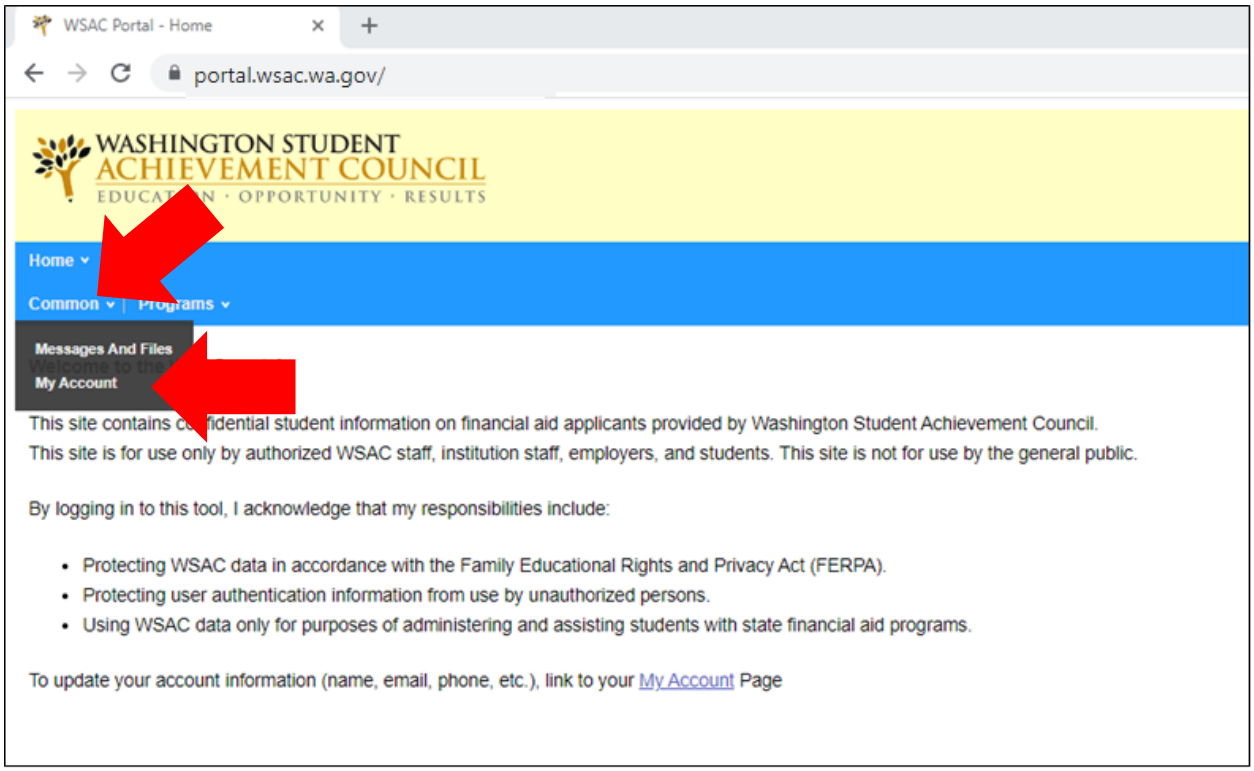
Resetting the Two-Factor Authentication Notification Method

WSAC recommends that Users change the default notification method used by the Portal to provide the authentication code.

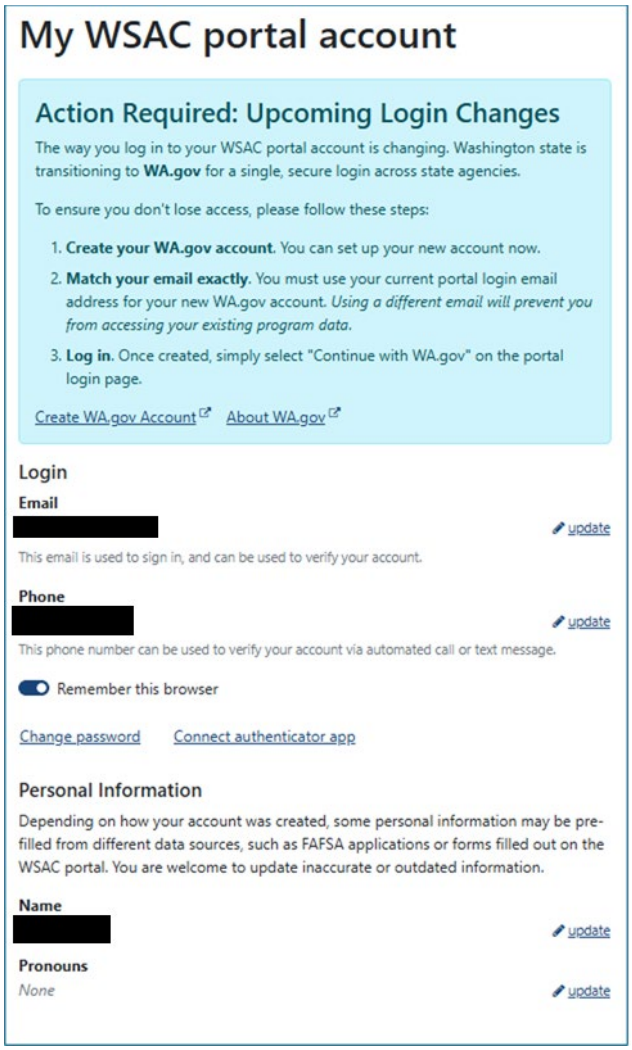
The initial default method sends the authentication code to the Username email address. This generally works unless the User is away from the regular workstation without access to the work mailbox, or if the User is working in PortalTraining. The PortalTraining two-factor authentication defaults to the method set in the active Portal. Because PortalTraining

is not a live production site, email notification is disabled, and the authentication code will not be sent by email.

To change the method by which the User receives the authentication code, log into the live production Portal site. Click on "Common" under the "Home" menu, then click "My Account." Remember that any changes made in the live production Portal are not effective in PortalTraining until overnight processing occurs.



This will open the User's account information screen, which appears as follows:



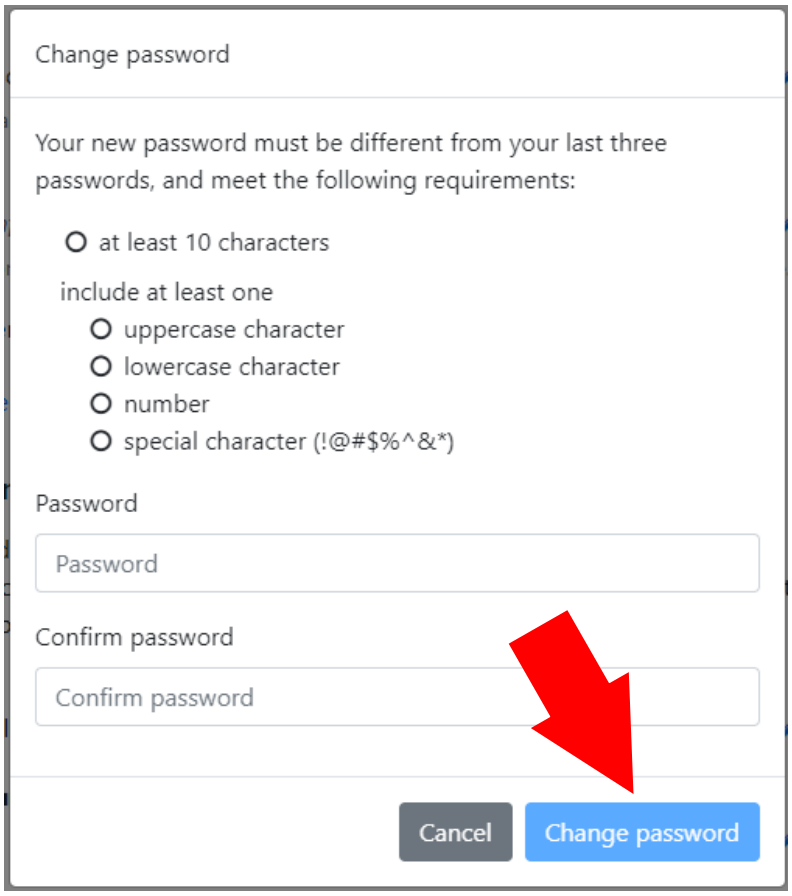
There are four options available to receive the authentication code:

- Email (this option is not functional in PortalTraining)
- Text to a cell phone
- Automated voice call to a cell or land line
- Authenticator app

Click “update” next to “Phone” and a field will open to enter a cell phone number (for text or automated calls) or a land line number (for automated calls only). Move the slider to turn on “Remember this browser.” Select “text” or “automated call” in the secondary login box to begin receiving authentication codes by that preferred method.

If the User prefers to use an authenticator application, click “Connect authenticator app” and follow the prompts to set up that delivery method. Remember to click “Remember this browser.”

Users may also update their email address and Password on this page. Click “Change password” to open that screen:



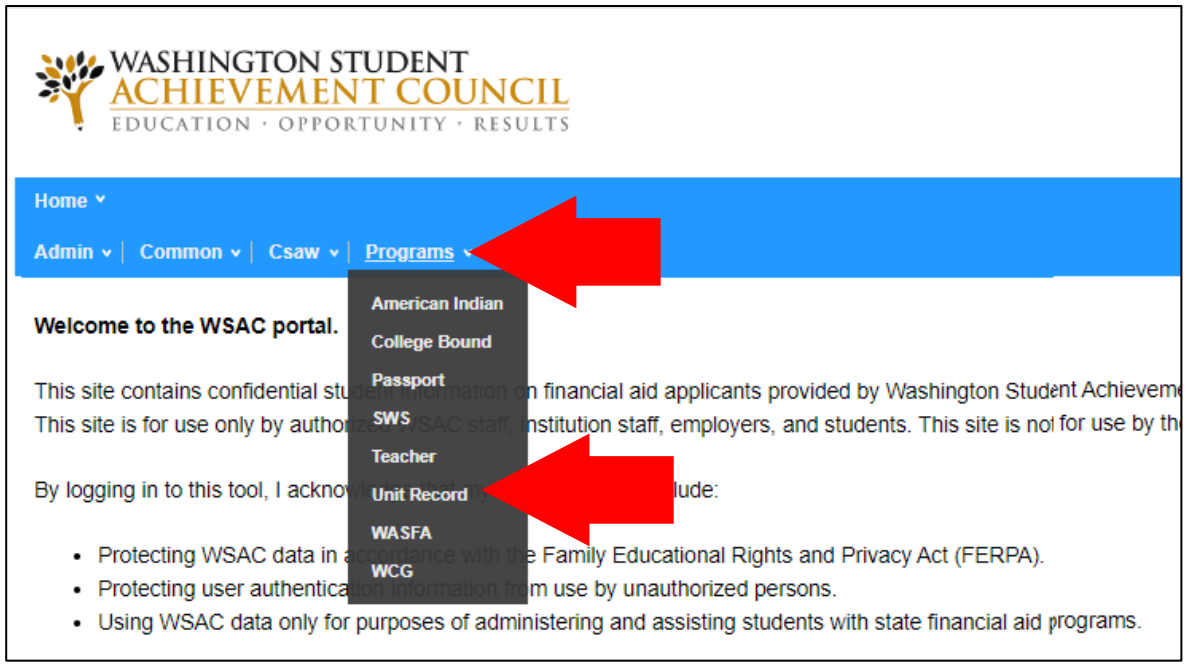
Begin typing the new password in the field, and the requirements will auto-check as as each criterion for a valid password is met. Confirm the new password by re-typing in the second field, then click "Change password."

Accessing the Portal Application

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

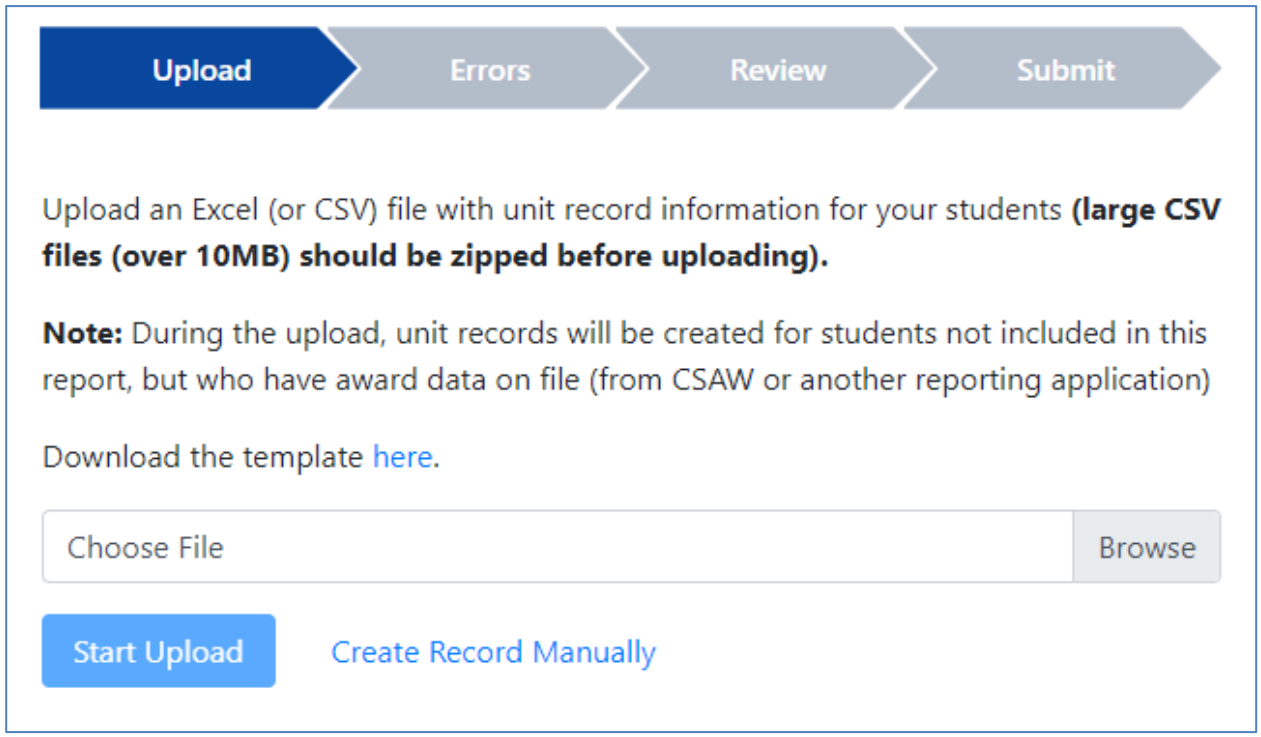
Under the "Programs" menu, click "Unit Record."

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



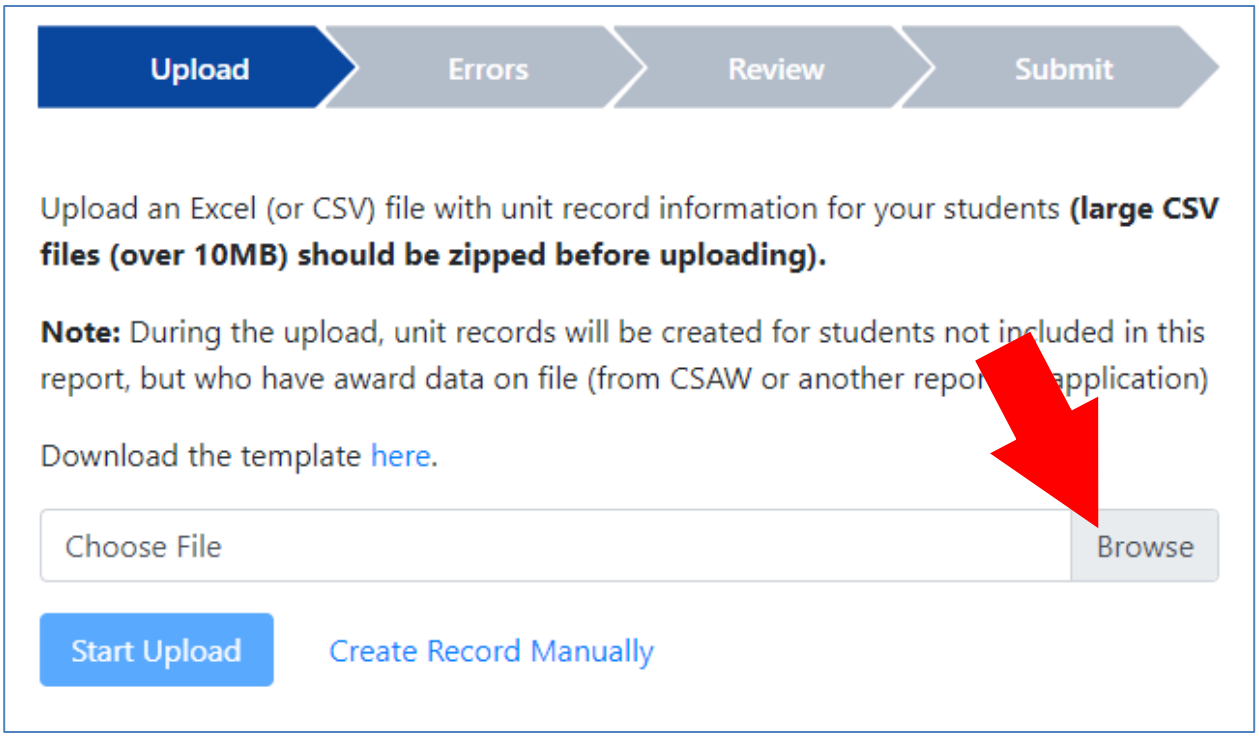
The User will encounter the following "Welcome" screen when logging into the URR for the first time each year. The User also may download a copy of the blank .csv template here, if necessary, to create the upload file.

Notice the Navigation bar, which will inform the User which progression step they are in as they complete URR submission. If the URR file was uploaded during an earlier Portal session, the User will be taken directly to the appropriate Navigation screen upon login.



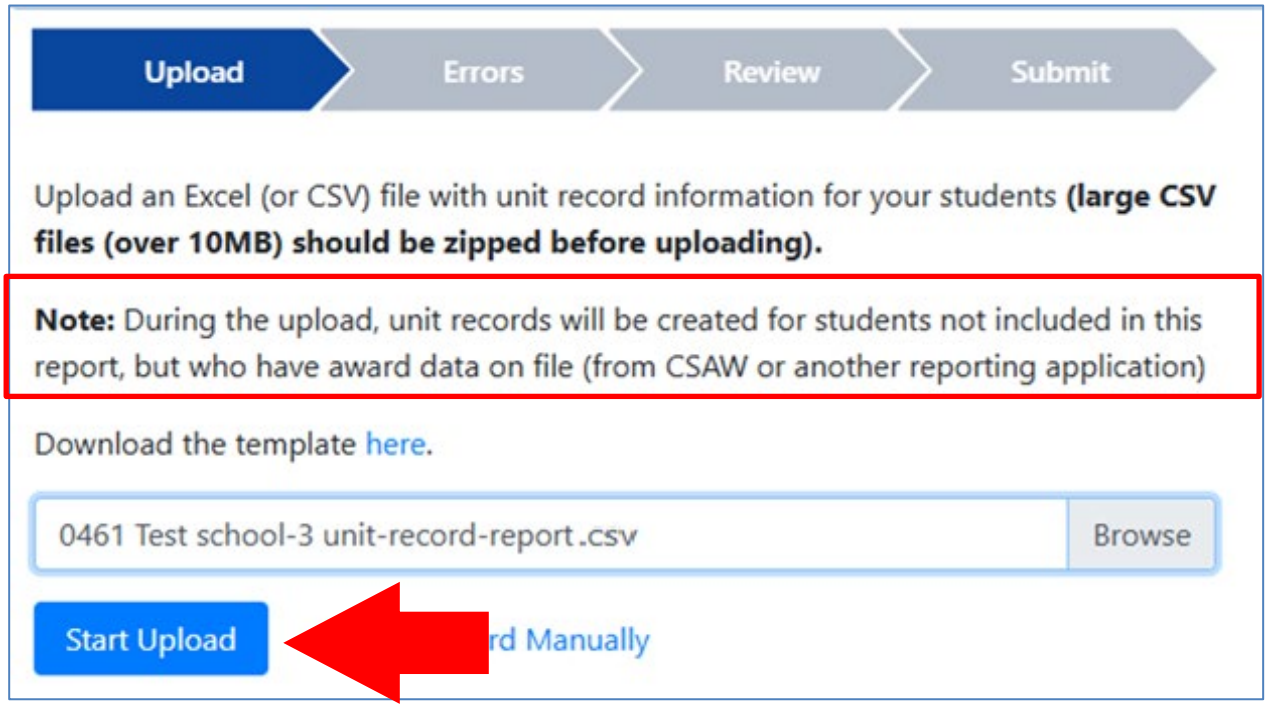
Uploading Data from an Initial File

From the "Welcome" screen, click the "Browse" button to find the file that you want to upload.



Be sure to select a file saved in .csv format; then, click the "Start Upload" button.

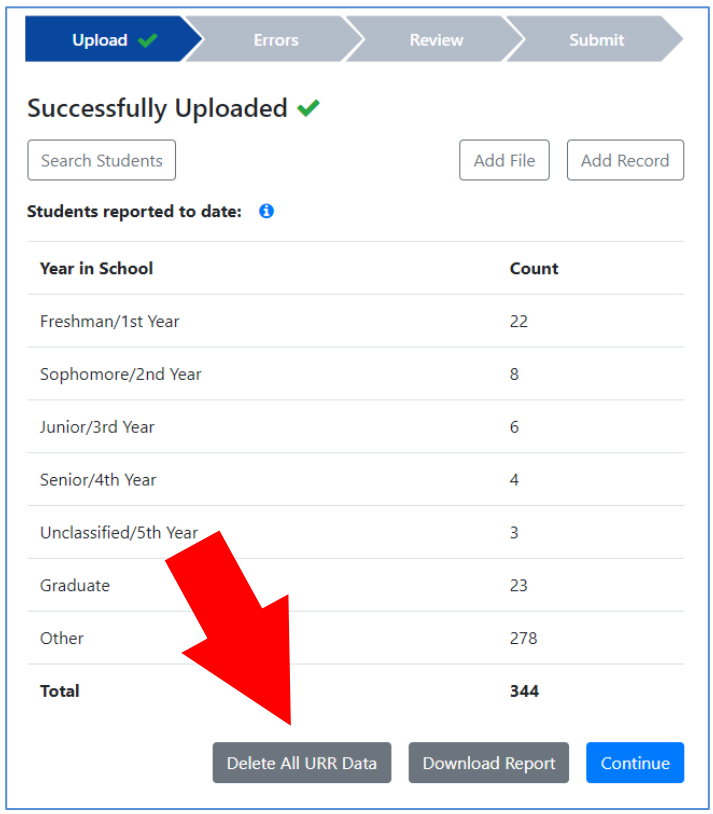
CAUTION: Upload of a new file will overwrite existing data, if any, and affect errors already overridden.



The upload process will be rapid, depending on file size. Users will receive a "Successfully Uploaded," or a "File Error" message if there are "critical errors," as shown below.

If the file did not upload due to a critical File Error, click the "Download Errors" button to download the .csv file that lists the errors that must be corrected. Then click the "Try Again" button, which will delete the file and return the User to the "Welcome"/Upload screen. Make the necessary corrections to the file before attempting to upload the revised file.

Generally not recommended: If you need to start over from scratch, the entire Upload files can be fully discarded from the URR Portal at any time during the editing process. From the "Upload" screen, click "Delete All URR Data," then upload a new file.

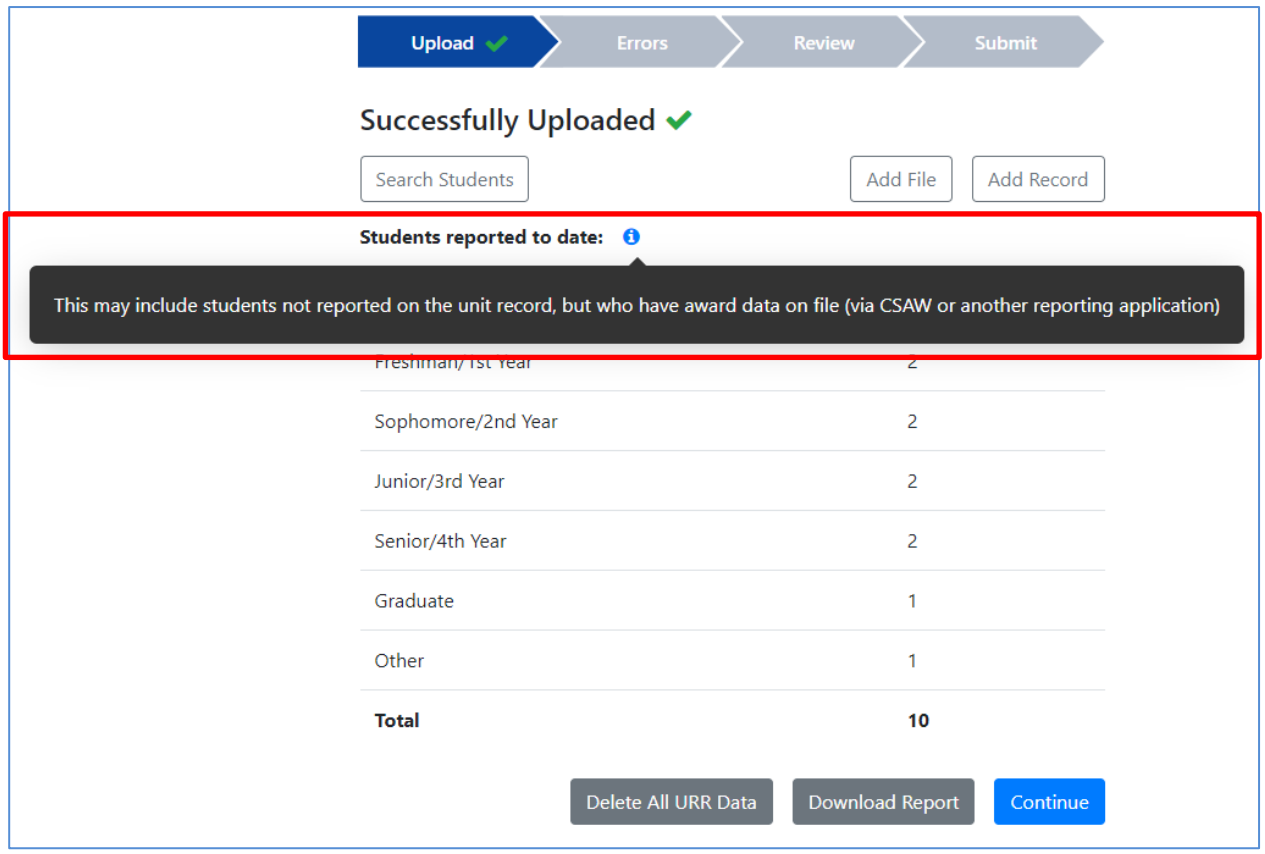


Editing Student Records

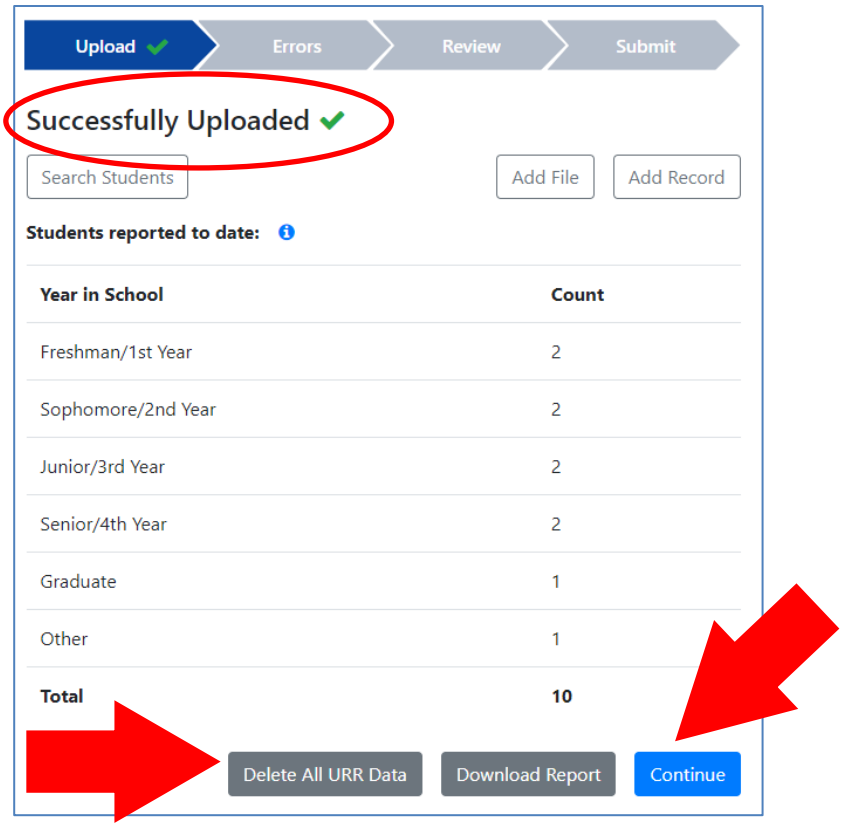
If the file uploads successfully, Users will see the "Successfully Uploaded" message. Verify that the number of student records uploaded and Year In School distribution matches your institutional records.

NOTE: Generally, the URR will auto-load "skeleton" records for students for whom WSAC has existing award data in CSAW or other Portal reporting applications for the year but are missing records in the institution's URR upload file (see pop-up note example shown on the Upload screen, below; the message becomes visible by hovering cursor over the blue info icon). An auto-loaded record may be an indicator of an SSN issue. Check for a duplicate student record in the original upload file under a different SSN.

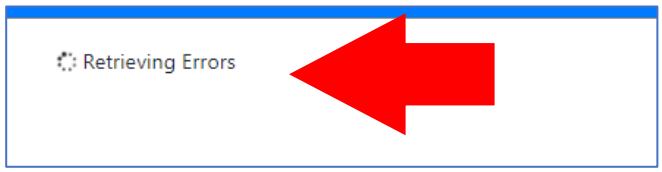
Auto-loaded records will generate errors that require the User to fill in the missing data. The auto-loaded "skeleton" record contains only the SSN ID, student name, and Errors generated due to the missing information. If the record represents a student for whom the institution will be returning funds to WSAC and no other reportable programs exist, enter explanation(s) in the Override Reason fields for the Errors, where applicable. Those records will be deleted from the URR by WSAC after refunds are returned and URR submission has been finalized.



If the Year in School counts are correct after reviewing the categories and total, click the "Continue" button. If the data does not match, click the "Delete All URR Data" button and upload a corrected file.

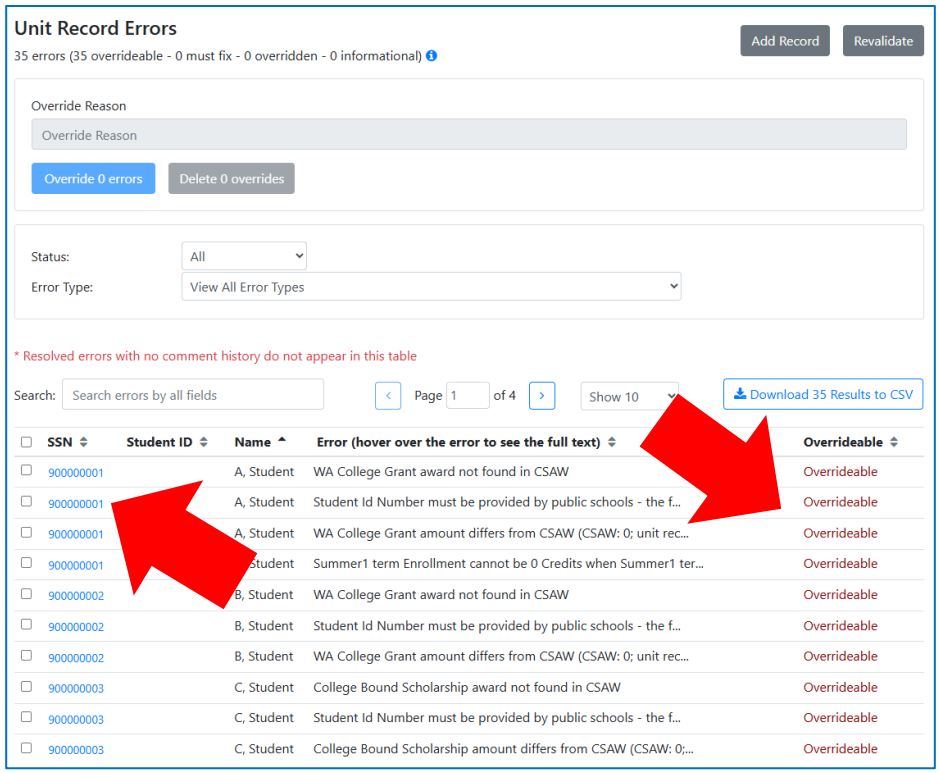


Clicking "Continue" will initiate error processing for the uploaded records:

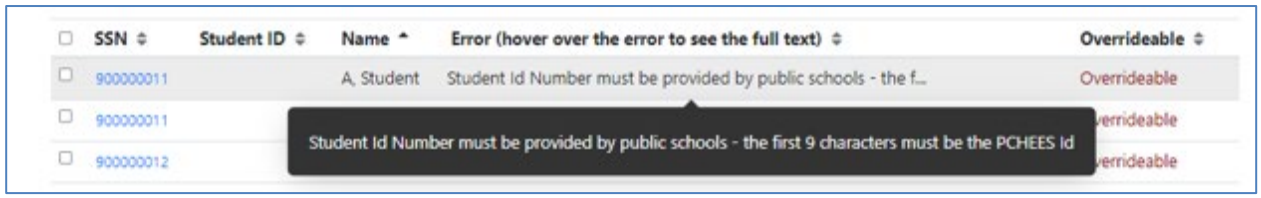


The Errors screen(s) lists the student records containing errors, the error type, and whether the error is Overrideable, Must Fix (non-overrideable), or Informational.

- **"Overrideable"** means the error must be corrected or an override explanation must be entered on the student record.
- Errors labeled **"Must Fix"** are Non-overrideable and must be corrected in the student record before the User can move forward to complete submission of the Unit Record to WSAC.
- **"Informational"** may or may not require correction depending on circumstance. Review and make adjustment, as needed, to ensure accurate reporting. For example, if "Student Aid Index Outside Expected Range" is an accurate amount that is reflected in the FAFSA or WASFA, enter an override note to that effect, or if inaccurately noted due to a typo, correct the amount shown; if appropriate, also add an override comment. Some Informational errors do not require adjustment, such as an accurately reported "Date Of Birth outside the standard range." WSAC recommends that a comment be entered whether or not a correction is made to ensure WSAC can see that the school is aware of the situation and that it was not overlooked.

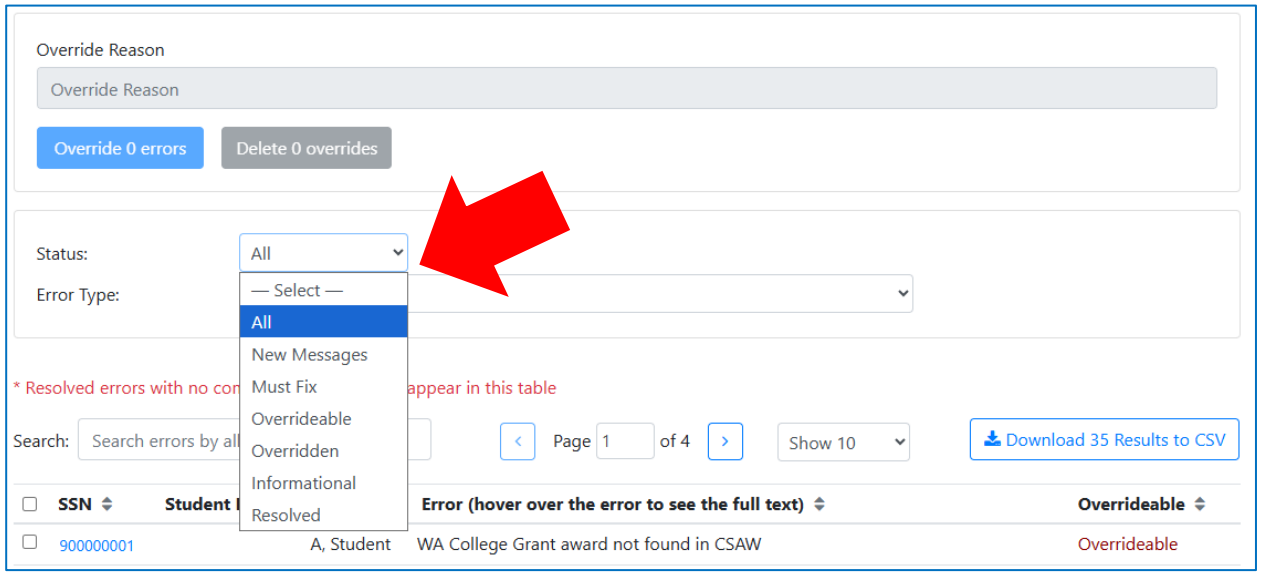


The full text of the error message is viewable by hovering the cursor over the message:

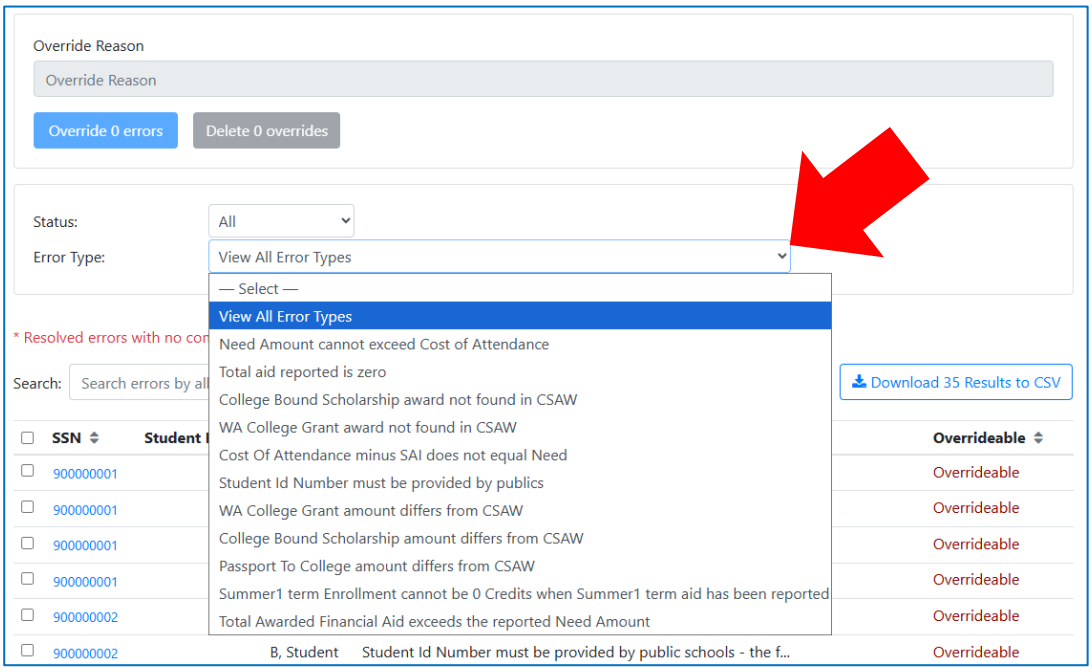


Users can sort the list by clicking the column headers, view errors by status, or choose to view errors by Error Type, as shown in the next two figures below.

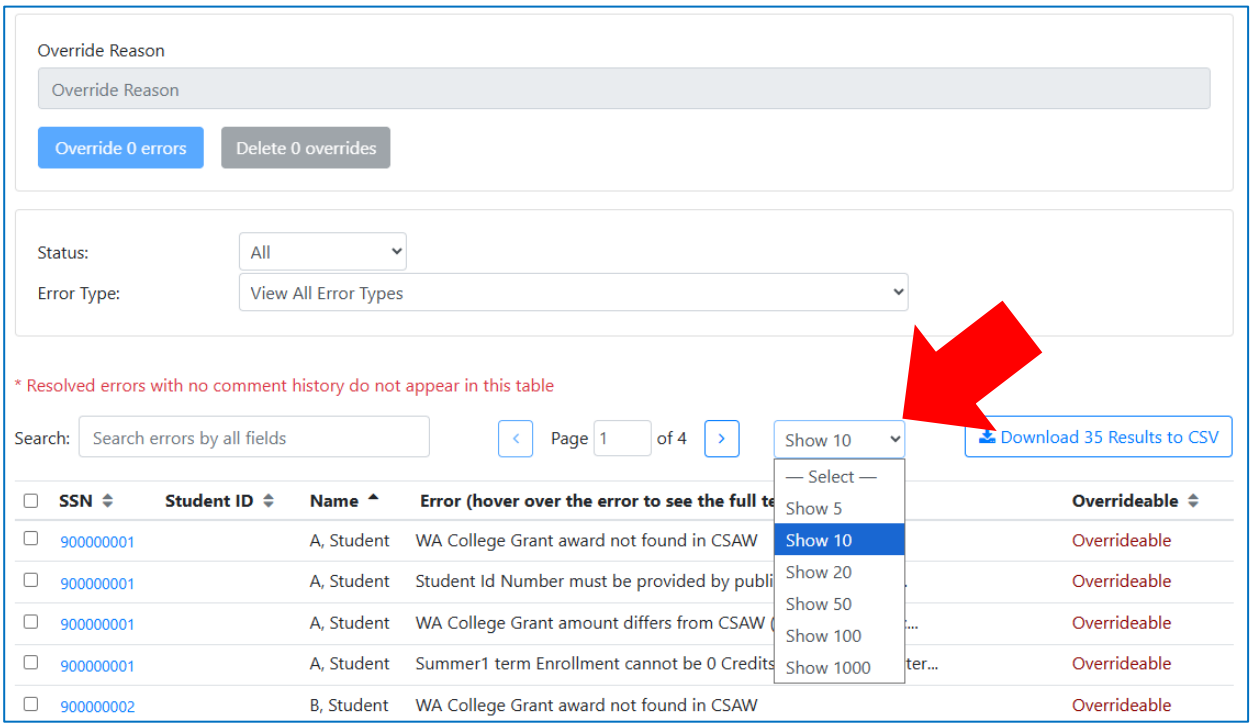
To view by error Status, select from the drop box:



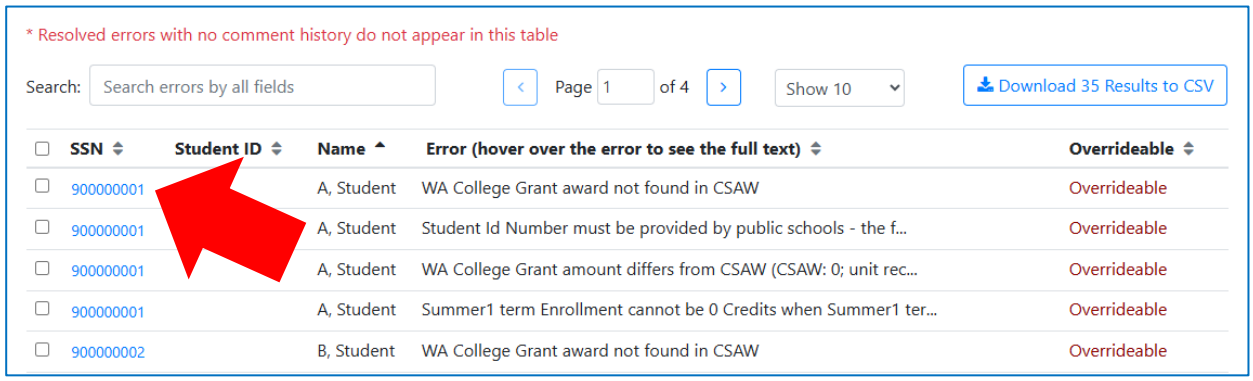
To view only those errors within an Error Type, click and select from the drop box next to Error Type:



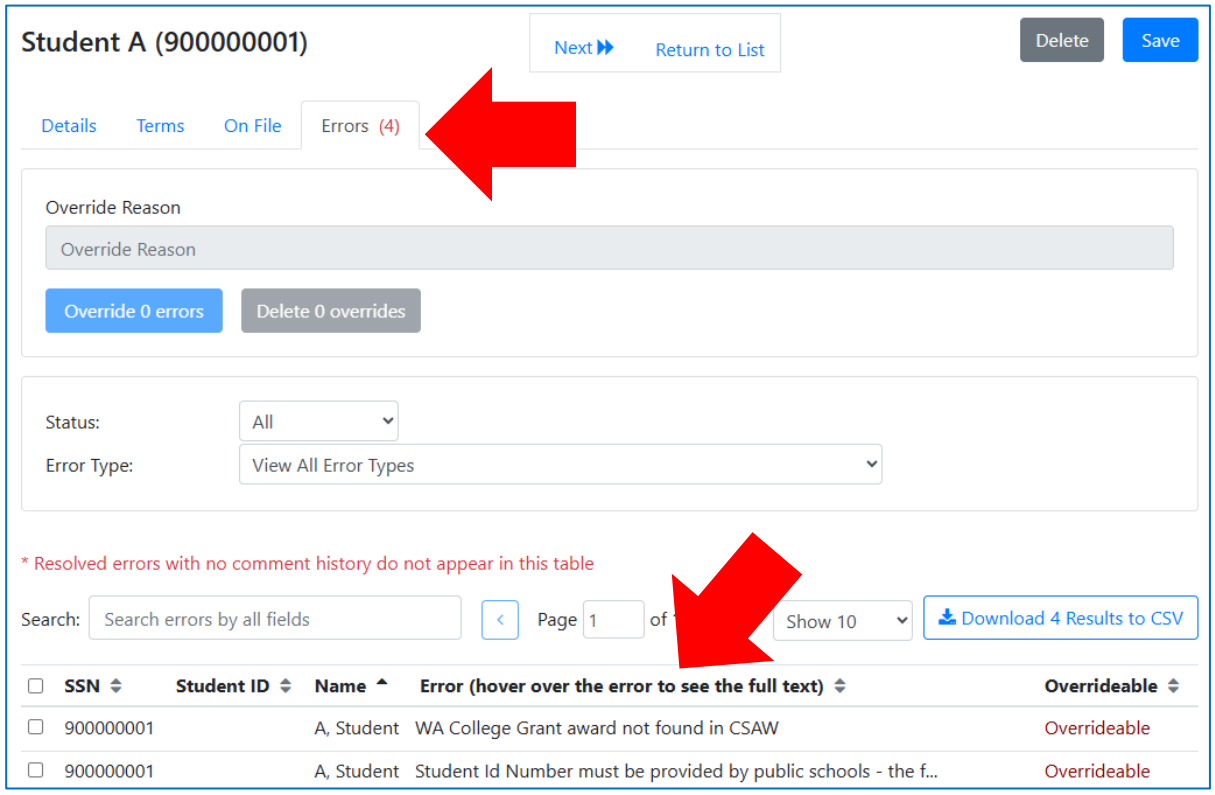
The User can also select how many rows of records to view in the error list by selecting from the drop box shown below.



To edit an individual record, click the student's SSN number to open the record for review or correction.



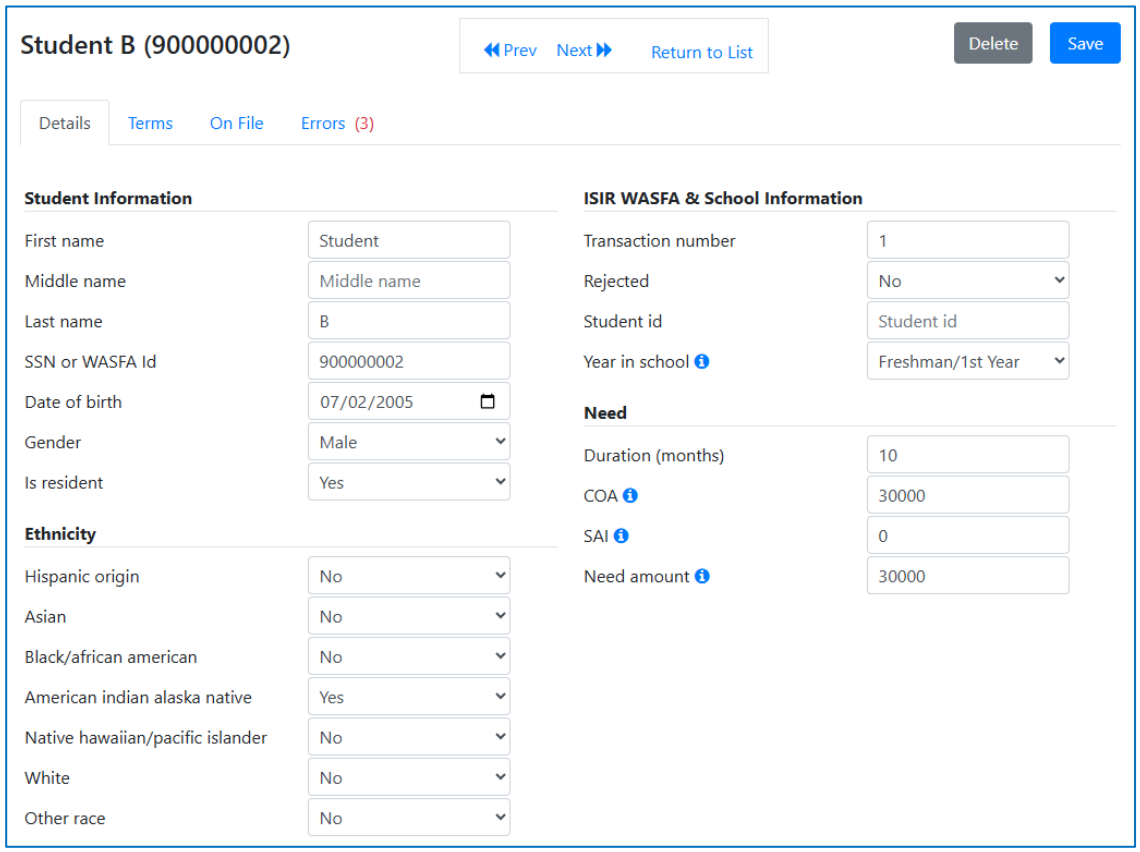
Error messages are displayed in a separate tab labeled "Errors" within the student record.



Review the student record screen(s) where the error resides to determine appropriate action, to correct or to enter an override explanation.

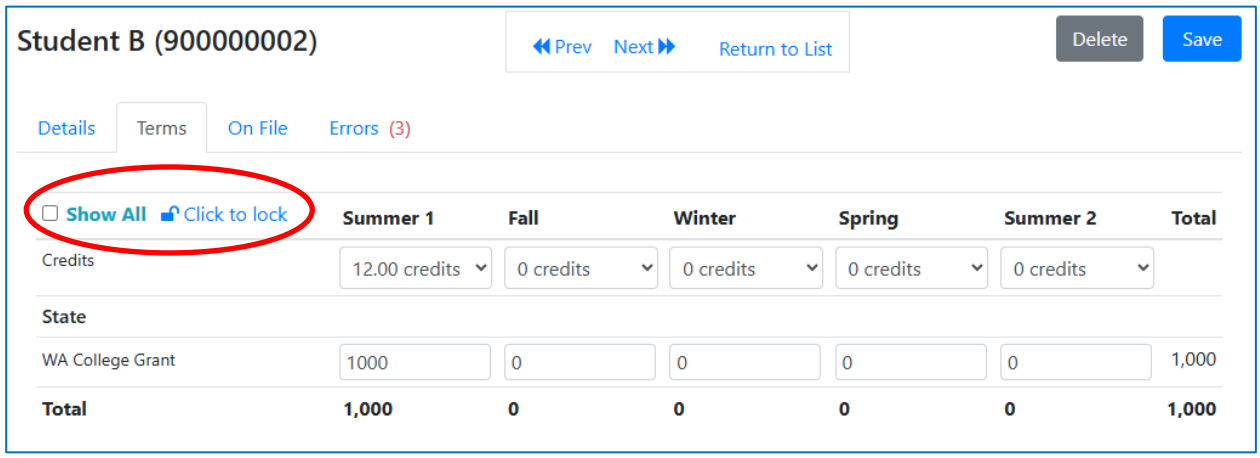
Examples of the Detail, Terms, and On File screens are shown below:

Detail screen example:

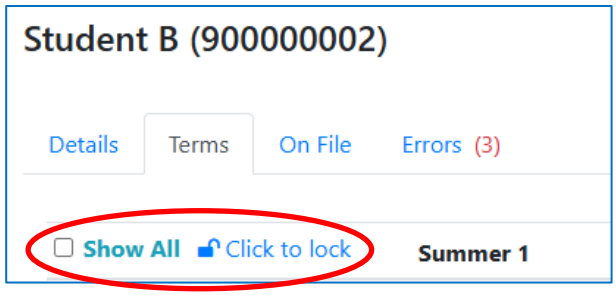


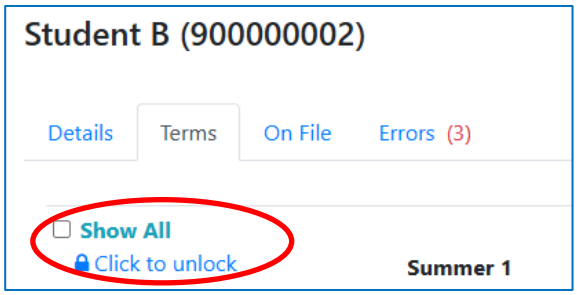
Terms screen example:

This is an abbreviated view of the screen, which shows only those programs in which aid is reported in the URR. Click Show All to view full list of programs to edit and add other program expenditures:



Click the lock icon to lock or unlock the abbreviated or full list view.



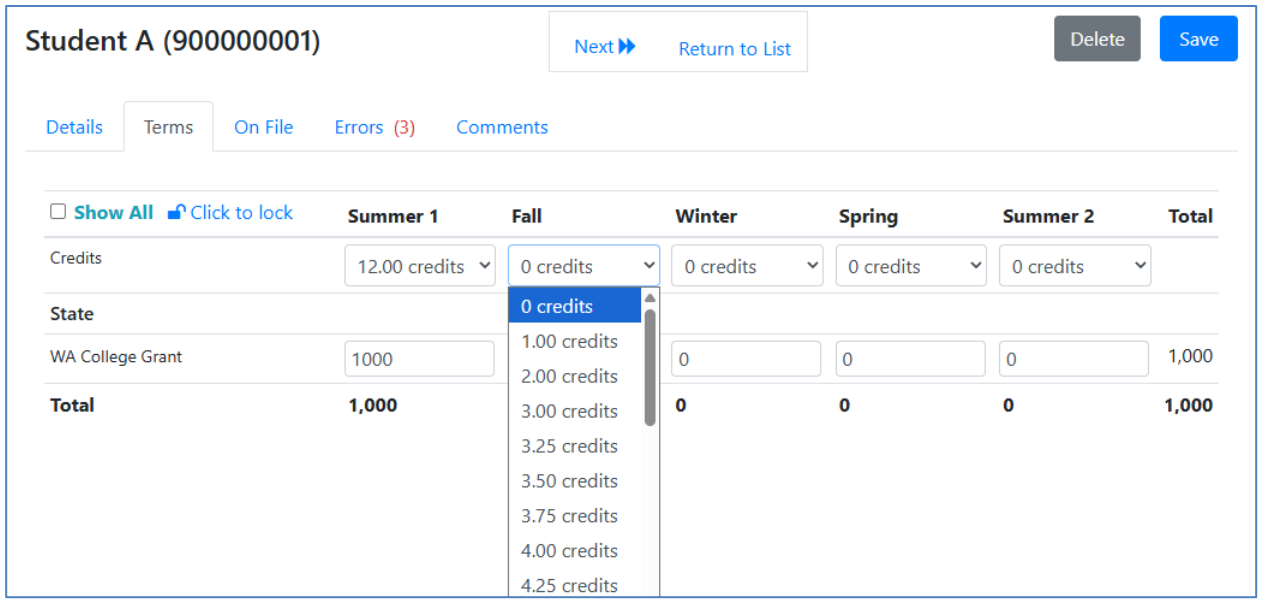


On File screen example:

Green check marks indicate matching data. A red "X" denotes mismatch of the data. The comparison chart shown cannot be edited directly but data updated and saved in the Details or Terms screen will update the Unit Record column of the On File screen. Corrections to the Program Data column update after corrections are applied in CSAW or other Portal resource screens.

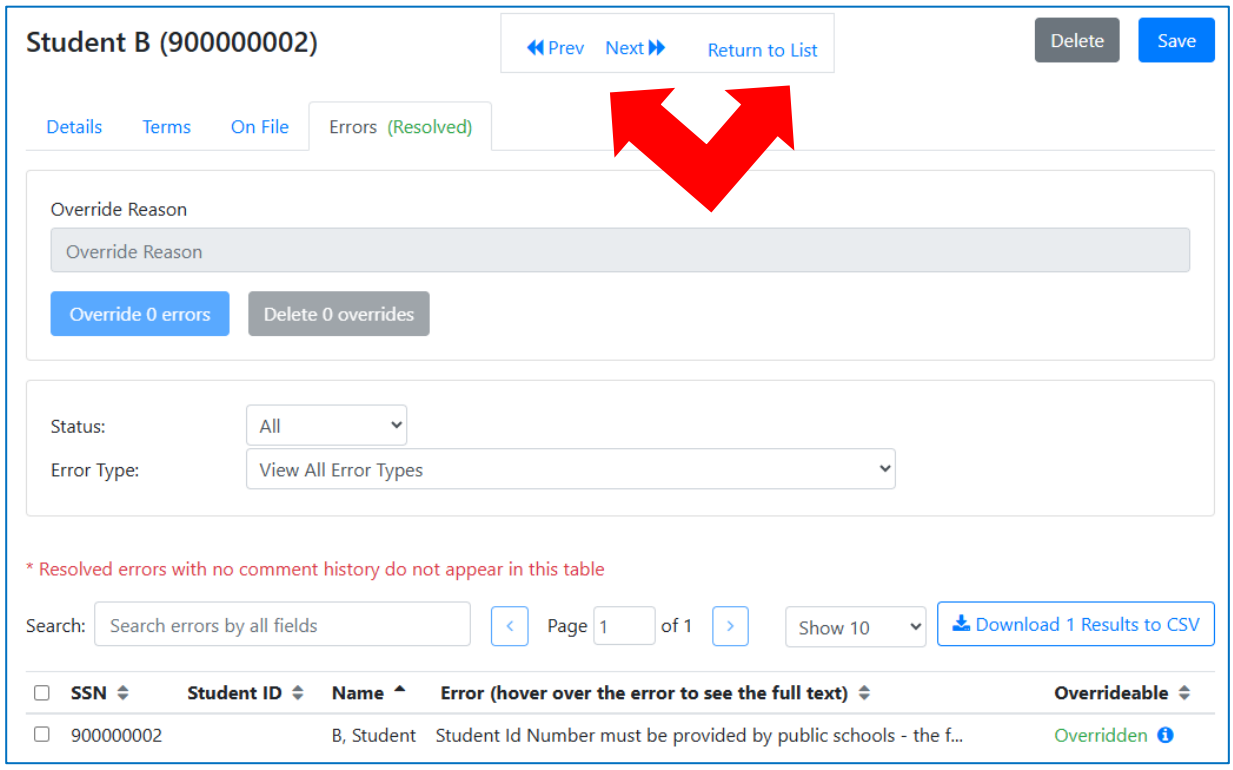
	Program Data	Unit Record	ISIR/WASFA	
SAI		$6,137	$6,137	✓
WCG	$974	$1,461		✗
WA Bridge	$0	$0		✓
CBS	$0	$0		✓
PTC	$0	$0		✓
PTC - Incentive	$0	$0		✓
Teacher Shortage		$0		✓
Paraeducator		$0		✓
ALT		$0		✓
STG		$0		✓
BHCS		$0		✓
SUDP		$0		✓
National Guard		$0		✓
WAVE		$0		✓

To enter revisions to the student record ("edit"), click the field to be modified, enter the correction, and then click "Save" in the upper right of the screen. Multiple changes may be entered in multiple screens of the same student record before clicking the "Save" button. Be sure to Save any changes before exiting the record, or those revisions will not be retained.



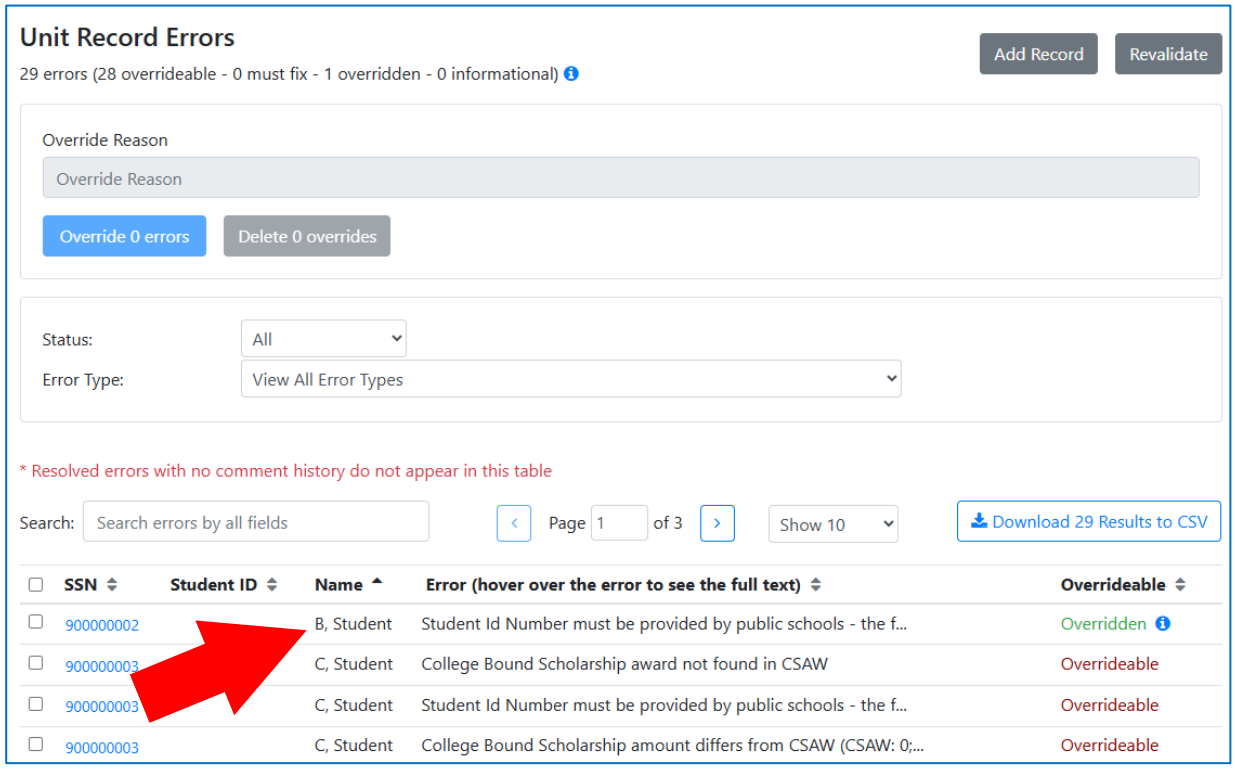
After all errors have been corrected or addressed with an override comment, and Saved in an individual student record, click Next to move to the next error record, click Prev to return to the previous error record, or click Return to List to return to the Institution's full Error List. Before leaving the student record, please note that resolved errors with no comment history will disappear from the error list whereas resolved errors with override comments do remain on the list with the "Overridden" notation. This is true of resolved errors with no comment history for the student record Error screen as well as the Institution's main Error screen.

Student record Error screen:



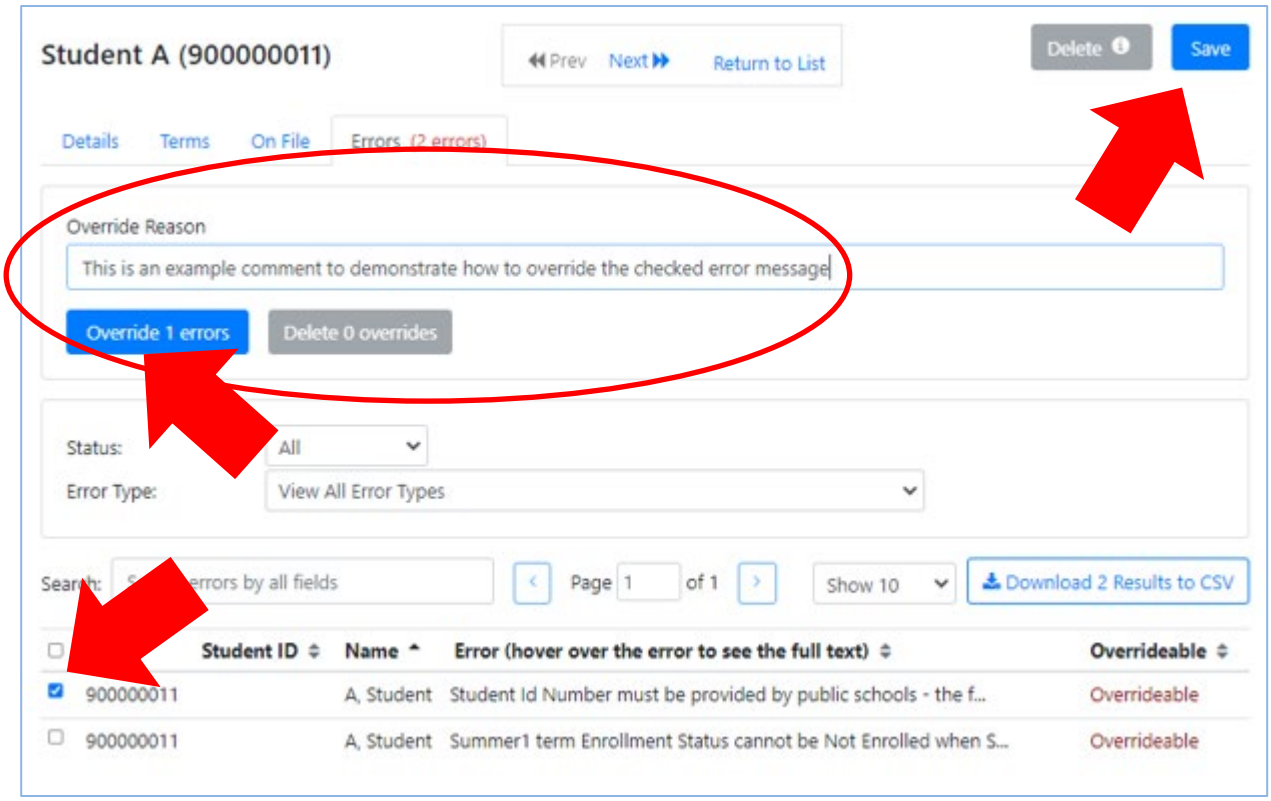
Institution's central Error screen:

Note that Student A no longer appears on the Institution Error screen if all errors have been resolved and no override comments were entered.

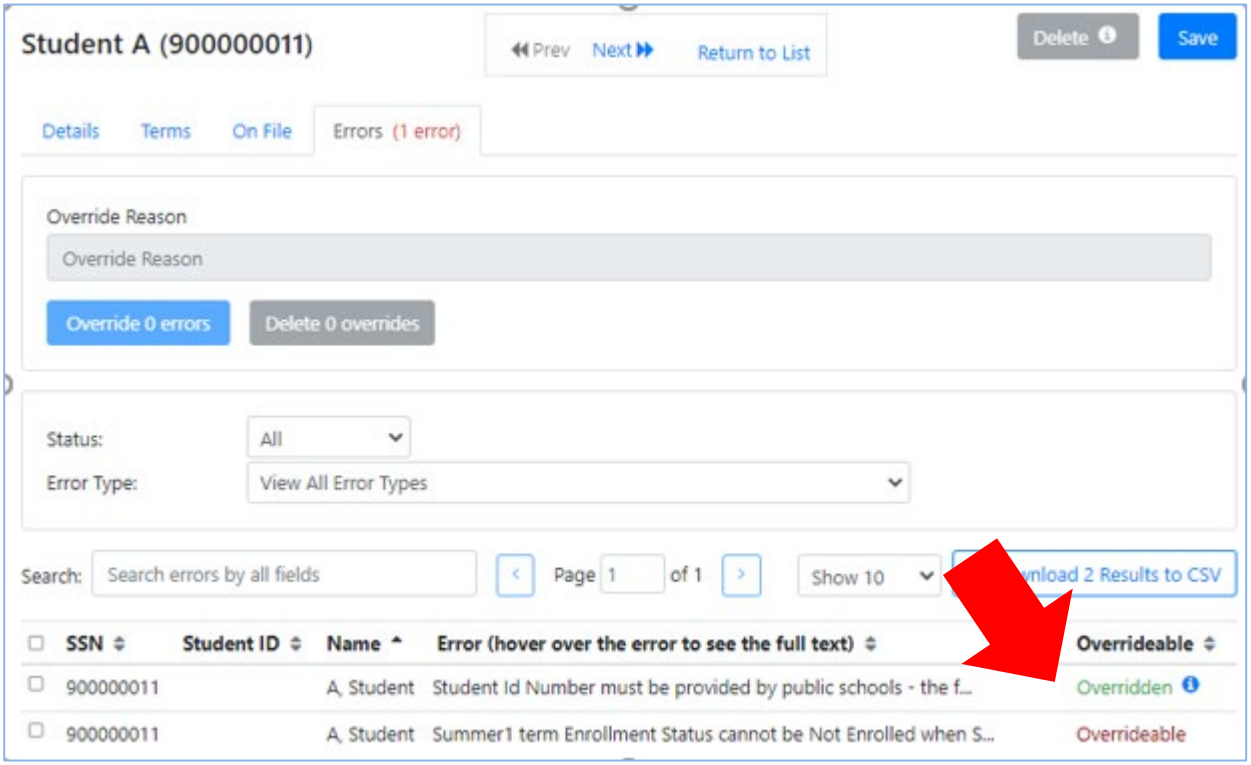


Processing Individual Overrides

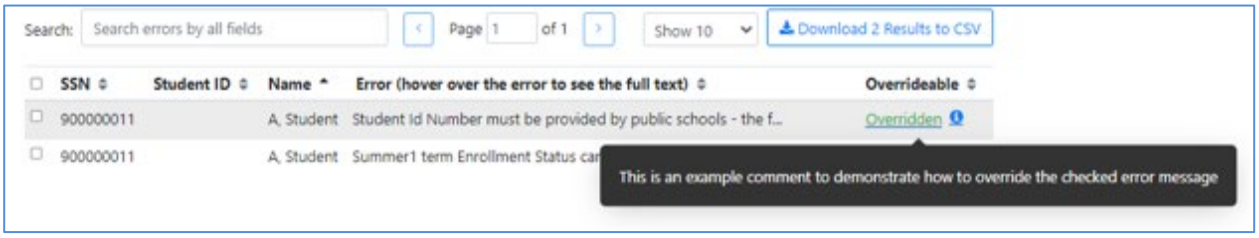
To enter an Override comment to address an Error message, click the check box at the head of the row for the error listed, then enter the comment in the Override Reason field above the error list. Click the blue "Override 1 errors" button and then "Save." The Override message will change to Overridden in green font.



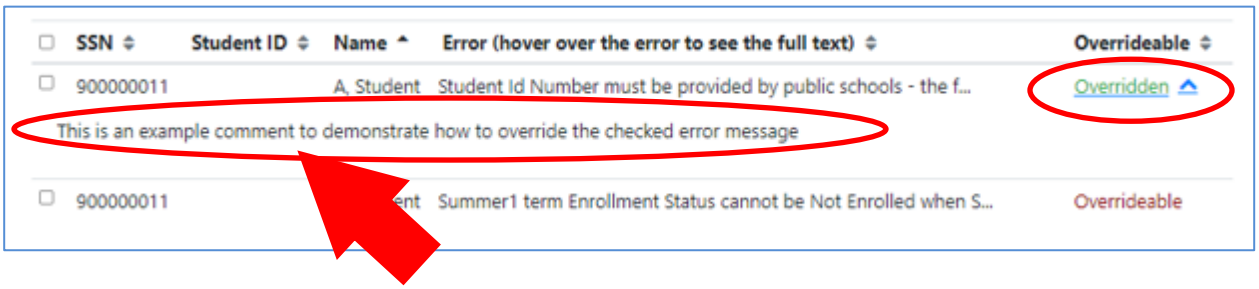
The Error status changes to appear as Overridden in green font.



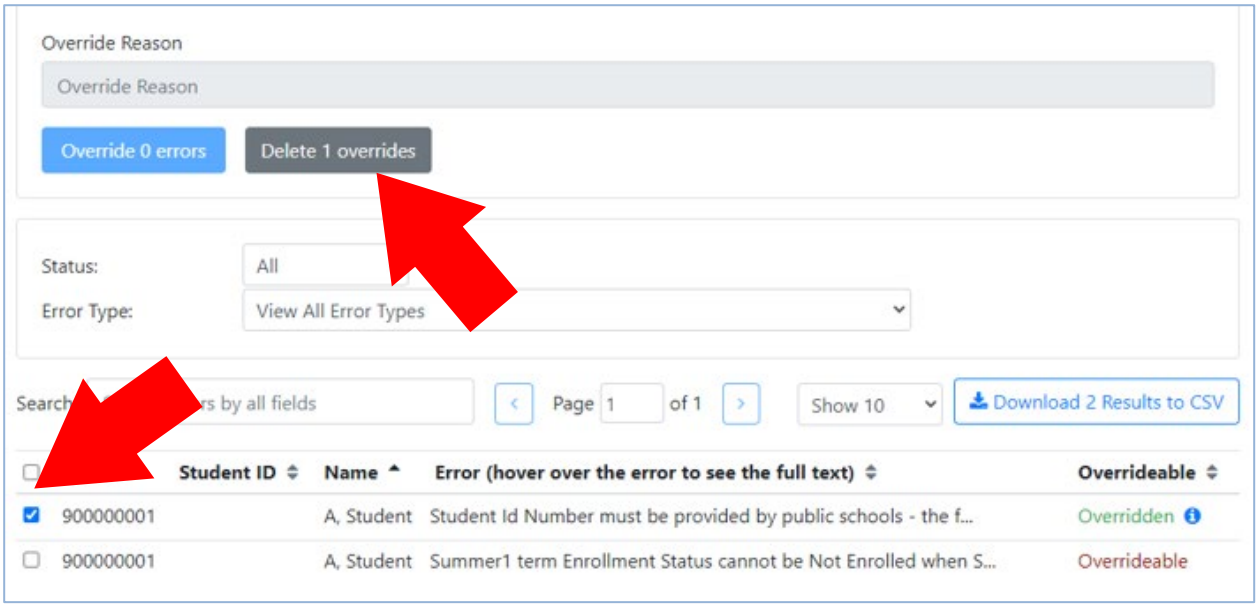
There are two ways to view the Override comment entered into the record. Hovering the cursor over the blue icon next to the green Overridden text will open a pop-up message:

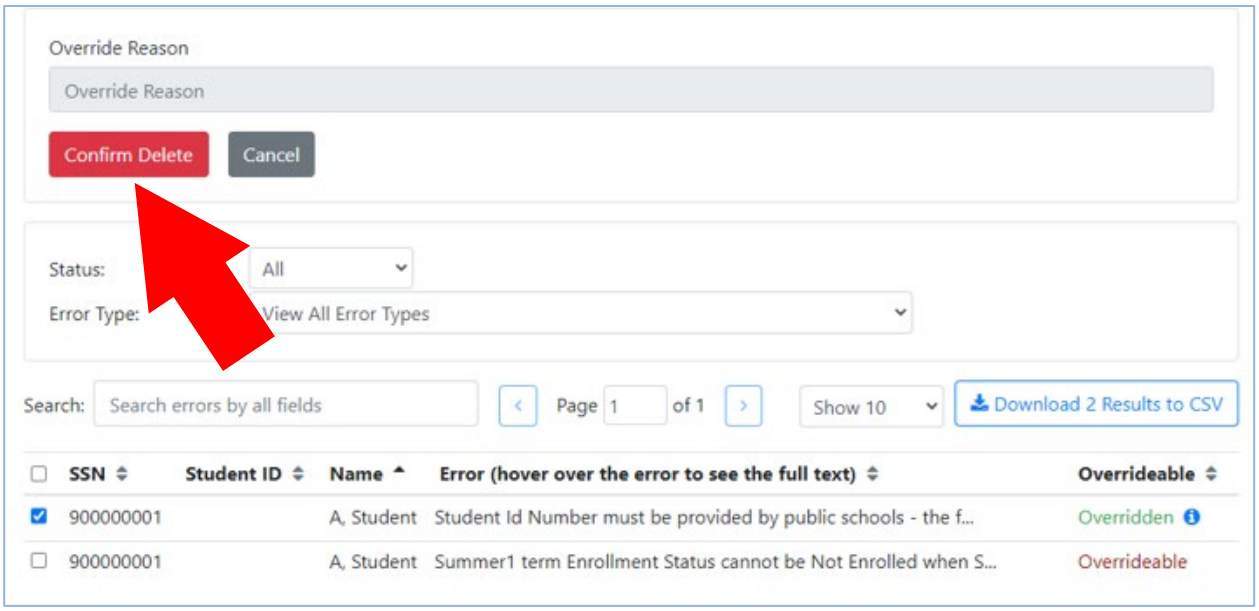


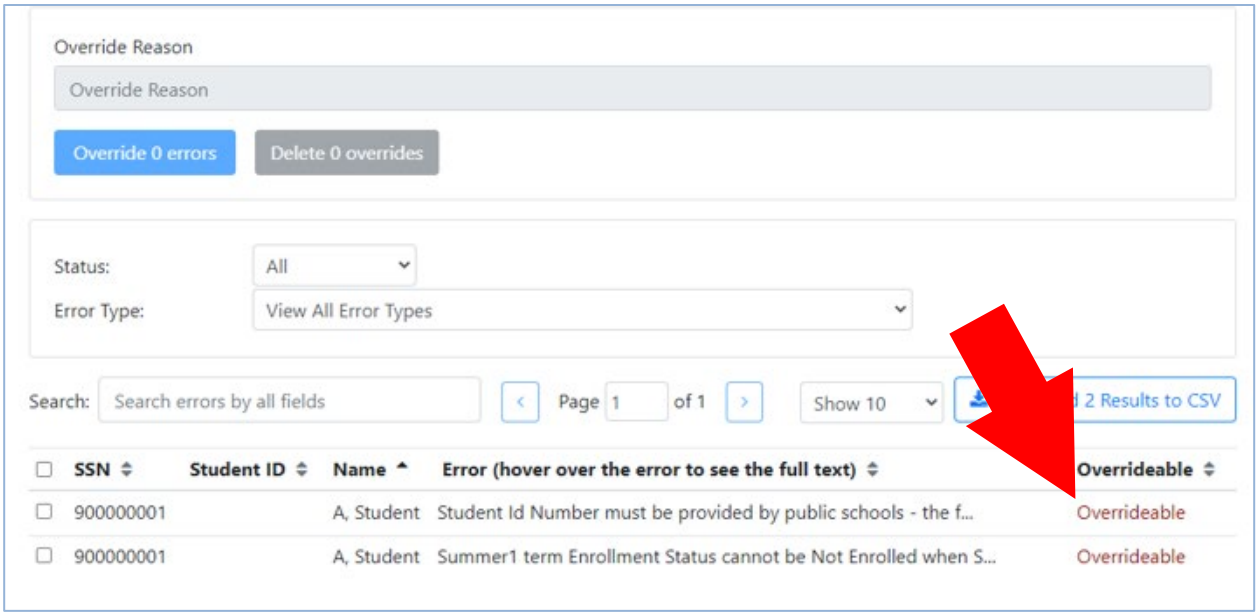
The second method is to view the comment as part of the Error screen. To make the override comment visible on the error screen, click the green Overridden text, and the comment will appear below the error message. To hide the override comment, click the up arrow next to the green Overridden text.



To delete an erroneous override comment, click the check box at the head of the row for the Overridden error, then click Delete Overrides, then click Confirm Delete, and Save. The Overridden message will revert to Overrideable in red font.





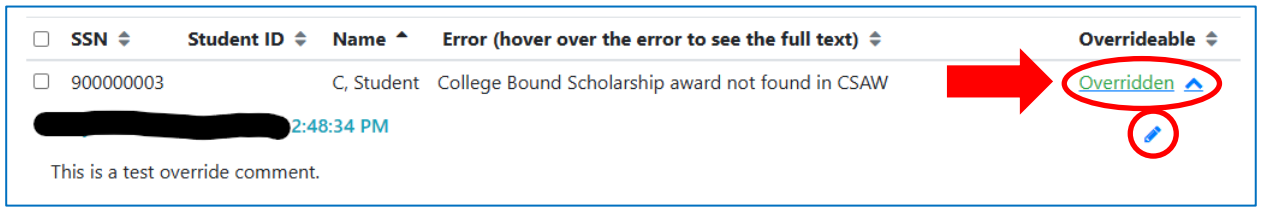


Amending Existing Override Comments: In many instances where Override comments need correction or addition of clarifying information, the original writer may choose to edit the Override comment that they themselves initiated. However, Edit capabilities depend on whether you are (1) editing an Override comment entered **prior to** initial URR submission to WSAC, or (2) responding to an Override rejection comment **after** the URR has been submitted and reverted (reopened) or editing that reject response prior to resubmit. However, in no instance are Users able to amend comments written by a different User, which requires that a new comment be entered.

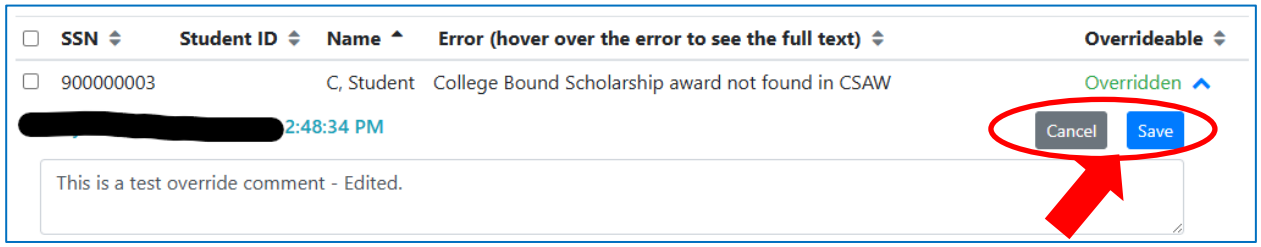
(1) Editing existing Override comment **prior to** initial URR submission:

To edit the Override, click the "Overridden" status at the end of the record's error message, which will drop down the initial Override comment to your view. If the Override comment

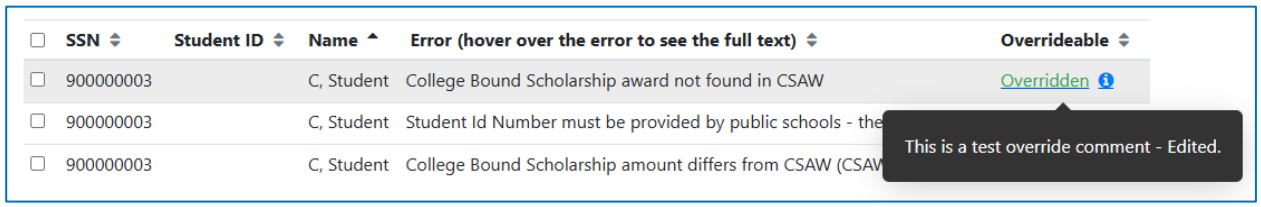
is editable, you will see the pencil editing tool on the far right of the comment. Click the pencil icon to edit the comment:



Edit the Override comment by adding or removing text, as desired, then click "Save" to retain the new information, or "Cancel" if you choose not to modify the original text.

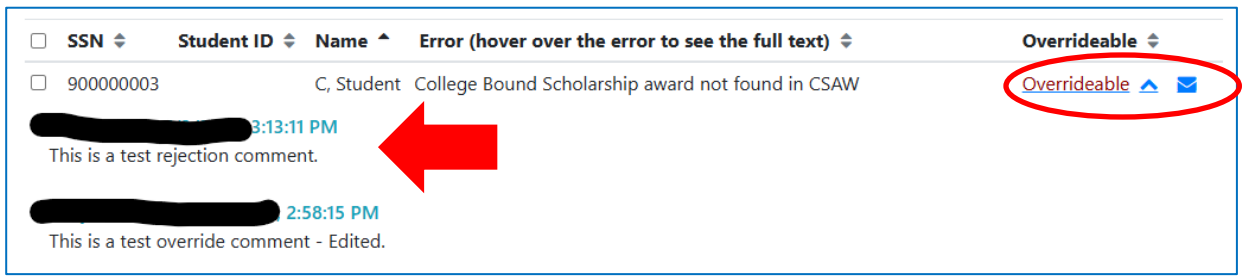


To double check your edited comment, either hover the cursor over the round blue "i" icon next to the "Overridden" status or click "Overridden" to reveal the comment in the error list. Observe that additional edits may be made to the comment using the pencil icon if you are not satisfied with the edited comment just entered.

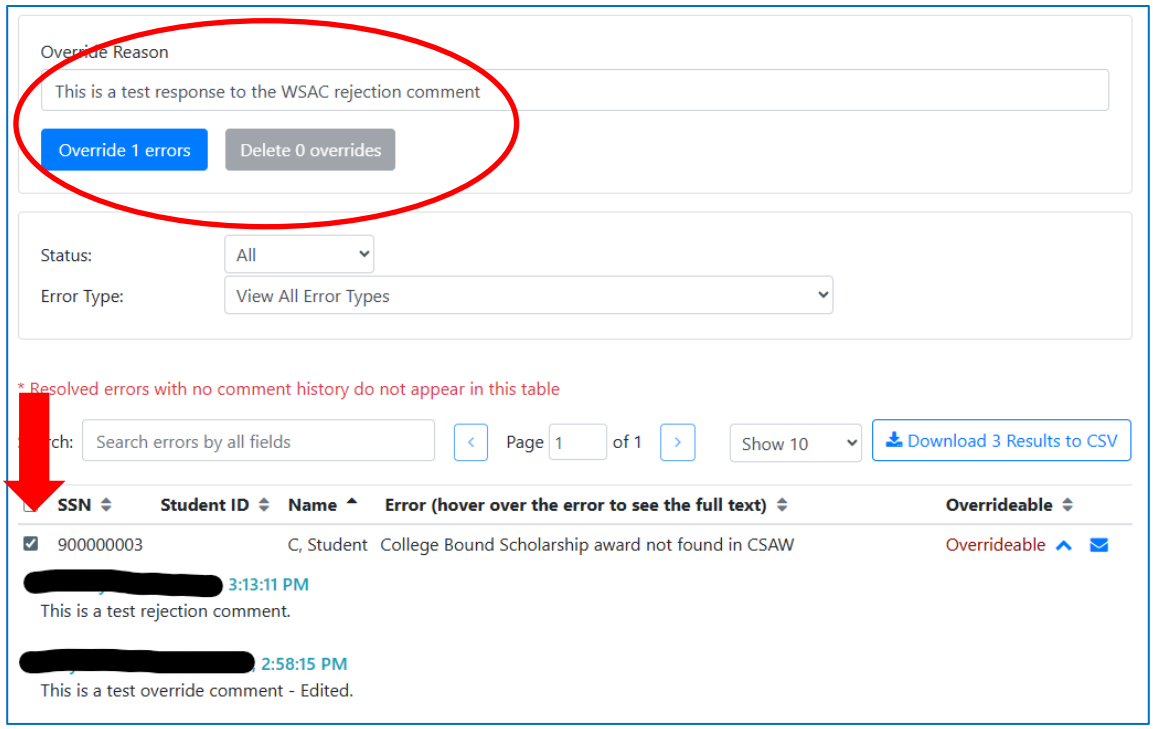


(2) Editing existing Override comment **after** URR submission and revert/reopen:

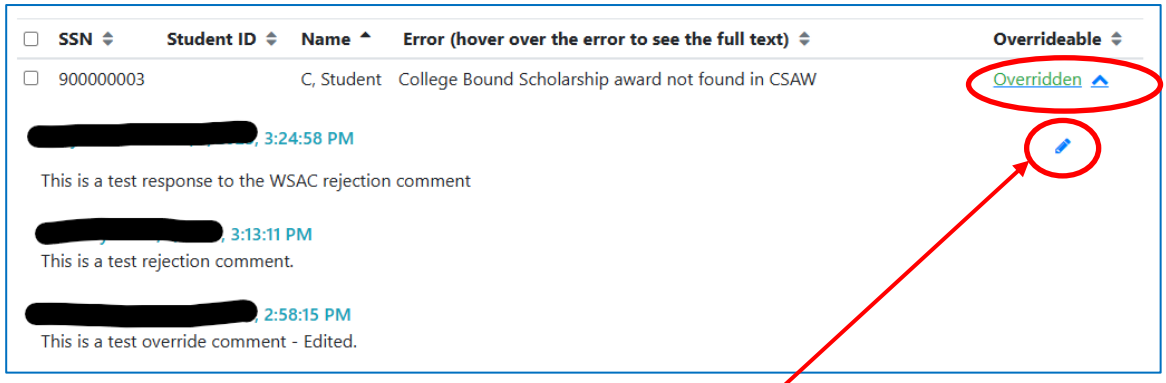
If the submitted URR is reverted (reopened) for additional information or correction, the Institutional override rejected by the URR team reviewer (see orange arrow) changes the Override status color from the green "Overridden" back to the red "Overrideable" status.



To address the WSAC rejection comment with your follow up Override comment, select the SSN box for that error, which will activate the Override Reason field. Enter your response in the Override Reason field, then click the blue "Override X errors" button and click "Save" at the top of the record screen.

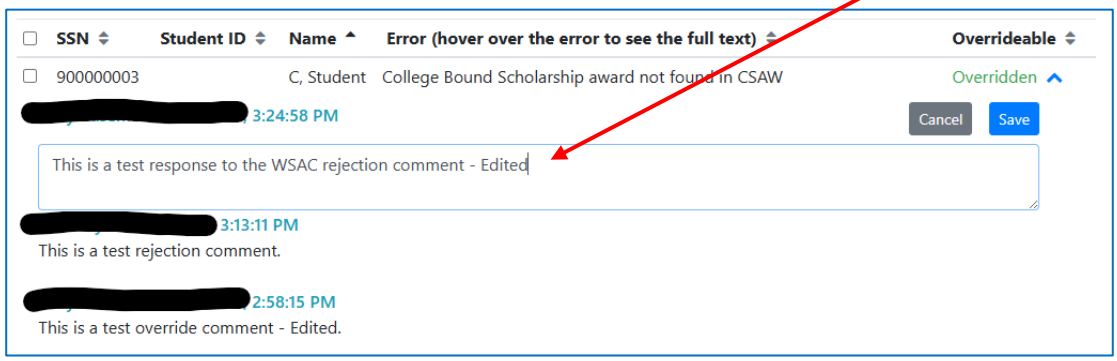


After saving the Override response to the URR team rejection comment, the red Overrideable status will again appear as the green "Overridden" status:

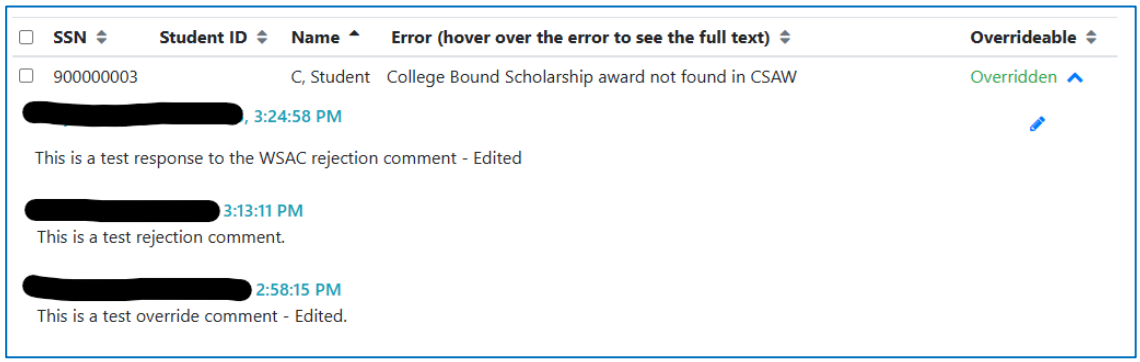


At that point, if also making record corrections in addition to the updated Override comment, go to the Details or Terms tab of the student record to enter corrections in the necessary field, then click "Save" before exiting the student record.

The new Override response may be edited and re-edited by the original writer prior to resubmitting the URR, by clicking the pencil icon (above) and entering a revised comment, shown below:



Screen view after saving the edited Override comment:



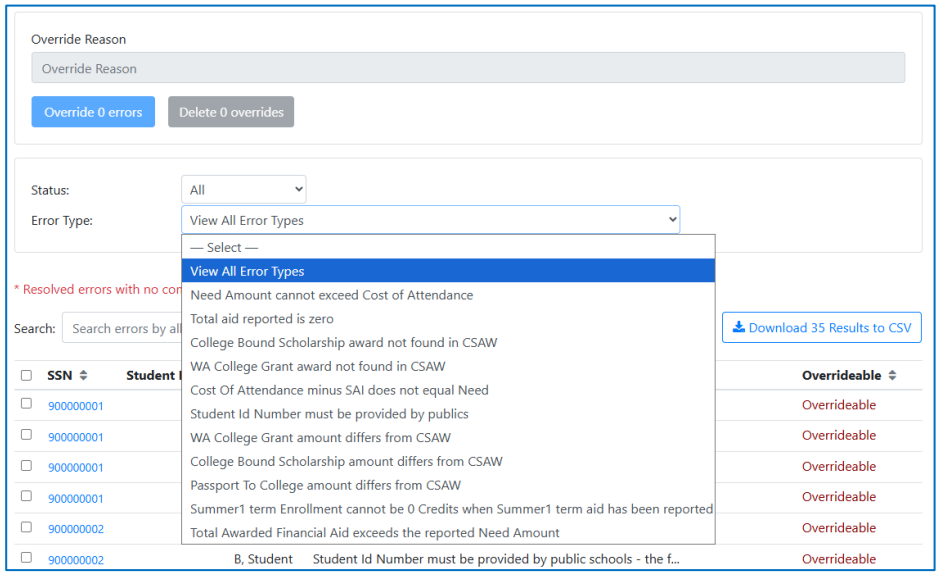
Once the URR has been resubmitted, however, institutional responses to a WSAC Reviewer question or notation must follow the procedure (2) for addition of a new Override comment. This preserves the integrity of the historical timeline of comments in the resolution of the Error(s) without deletion of pre-existing comments. Institutions cannot access prior Override comments from the earlier URR submission for edit.

"Bulk" Override Processing

Multiple record overrides can now be processed simultaneously. This functionality is best limited to processing the Error Types for student records after a review of each student record to ensure that the explanatory override comment is suitable to all records for which it will be applied. **WSAC will review individual records where bulk overrides have been applied to ensure that the Override comment processed against each record does fit the individual conditions being overridden.**

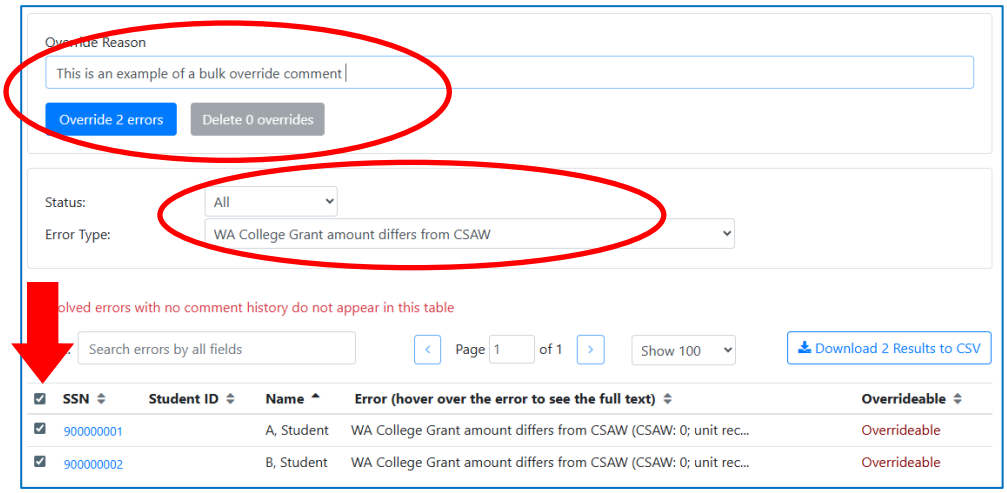
The bulk override procedure can be accessed from the Institution's main Error screen or applied to an individual record having errors with associated causes.

To identify records of the same Error Type, click the dropdown box and select the desired Error Type.

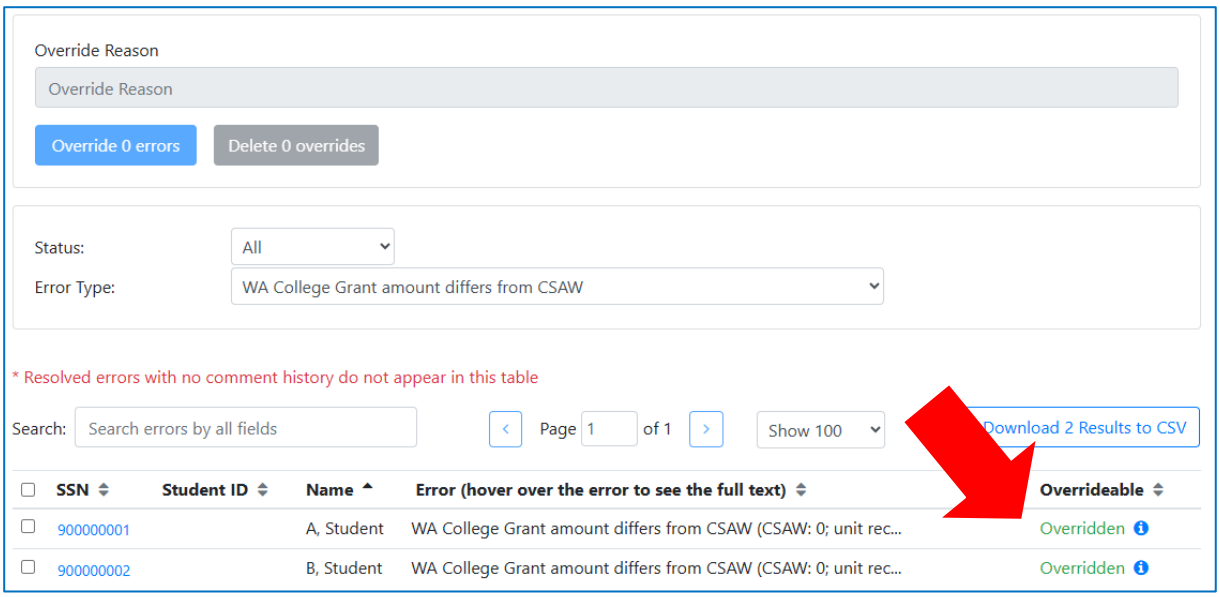


Review the individual records to determine whether a correction is needed or if a specific override reason should be applied. Check the box at the head of the error row for each record to which the Override Reason will be applied. If the Override Reason will be applied to all records appearing in the list for the Error Type, click the check box next to the "SSN" column header to select all records of that Type as shown in the example below.

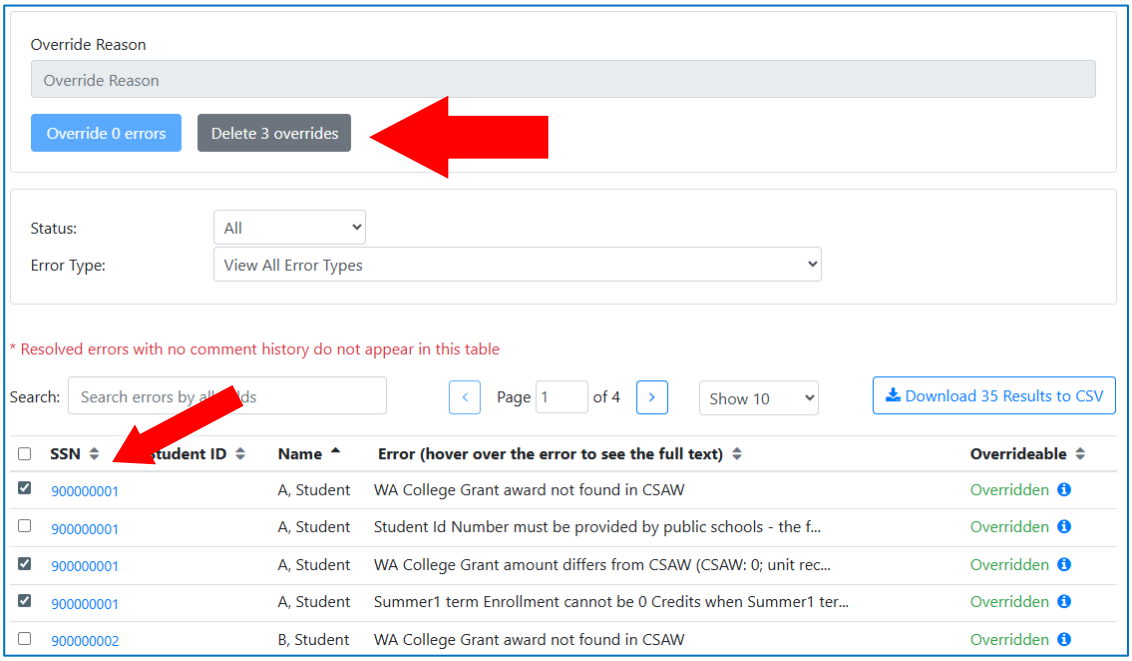
Enter the explanation/reason into the Override Reason field, then click the blue Override Errors button. (Note that the number of errors to which the Override will be applied appears within the blue Override Errors button. See example, below.)



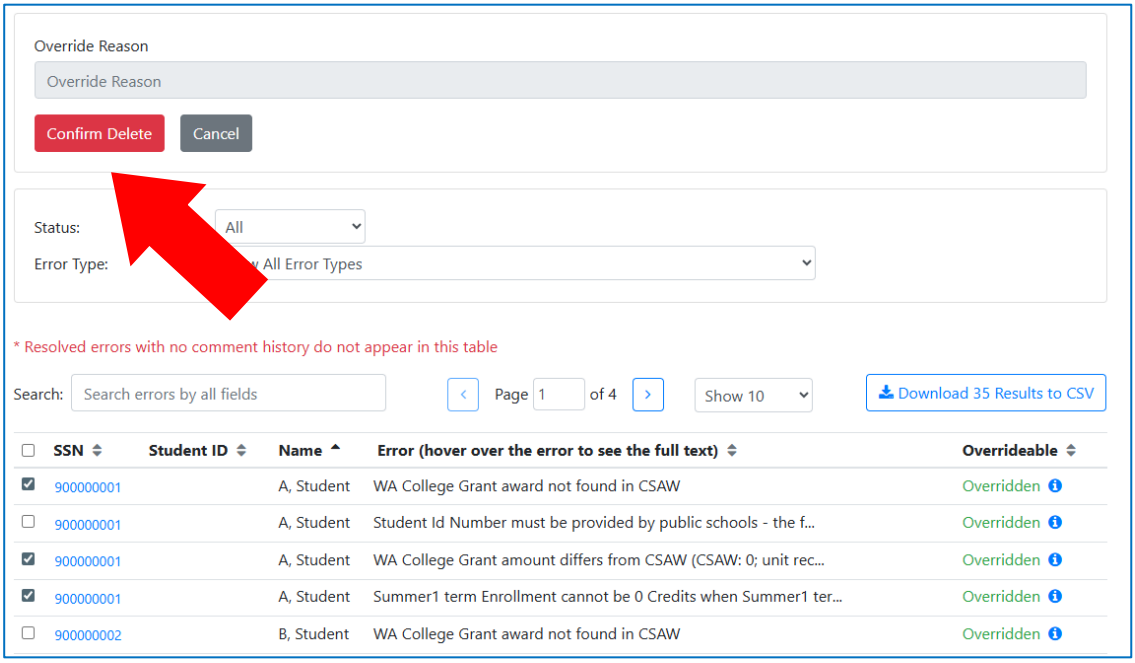
The Override Reason will be applied to all checked records. (Red font for Overrideable notation changed to green font Overridden.)



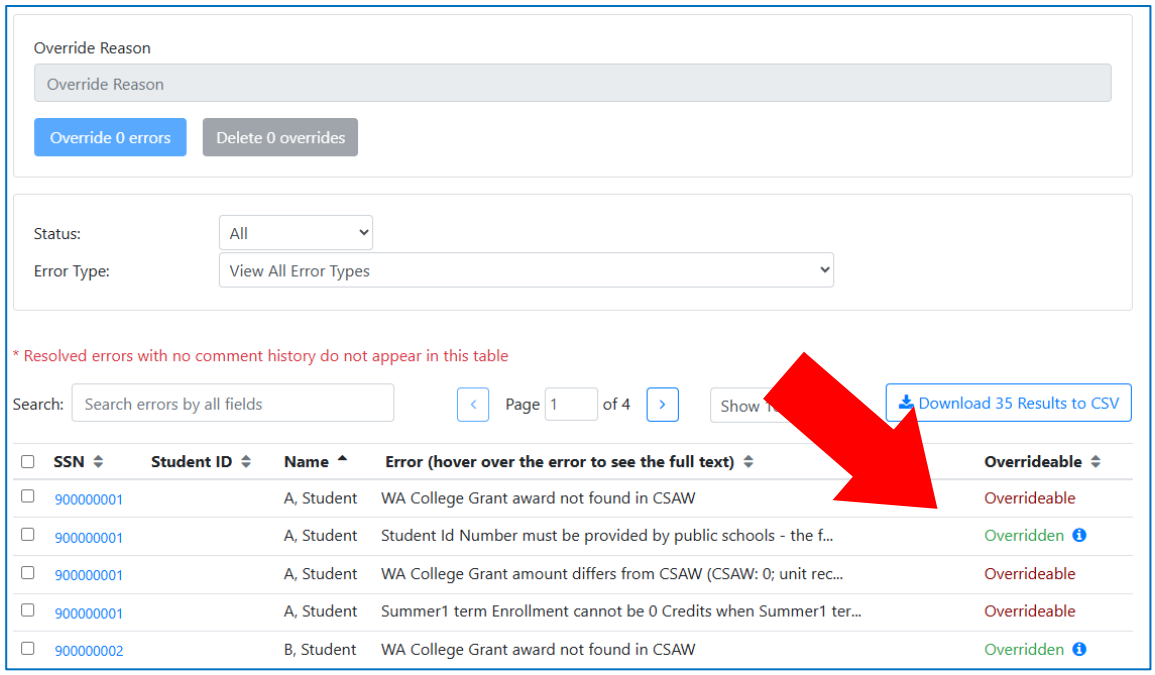
Deletion of Overrides can be accomplished in bulk, also, by checking the individual records (or selecting the box next to the SSN column header), then clicking the gray Delete Overrides button.



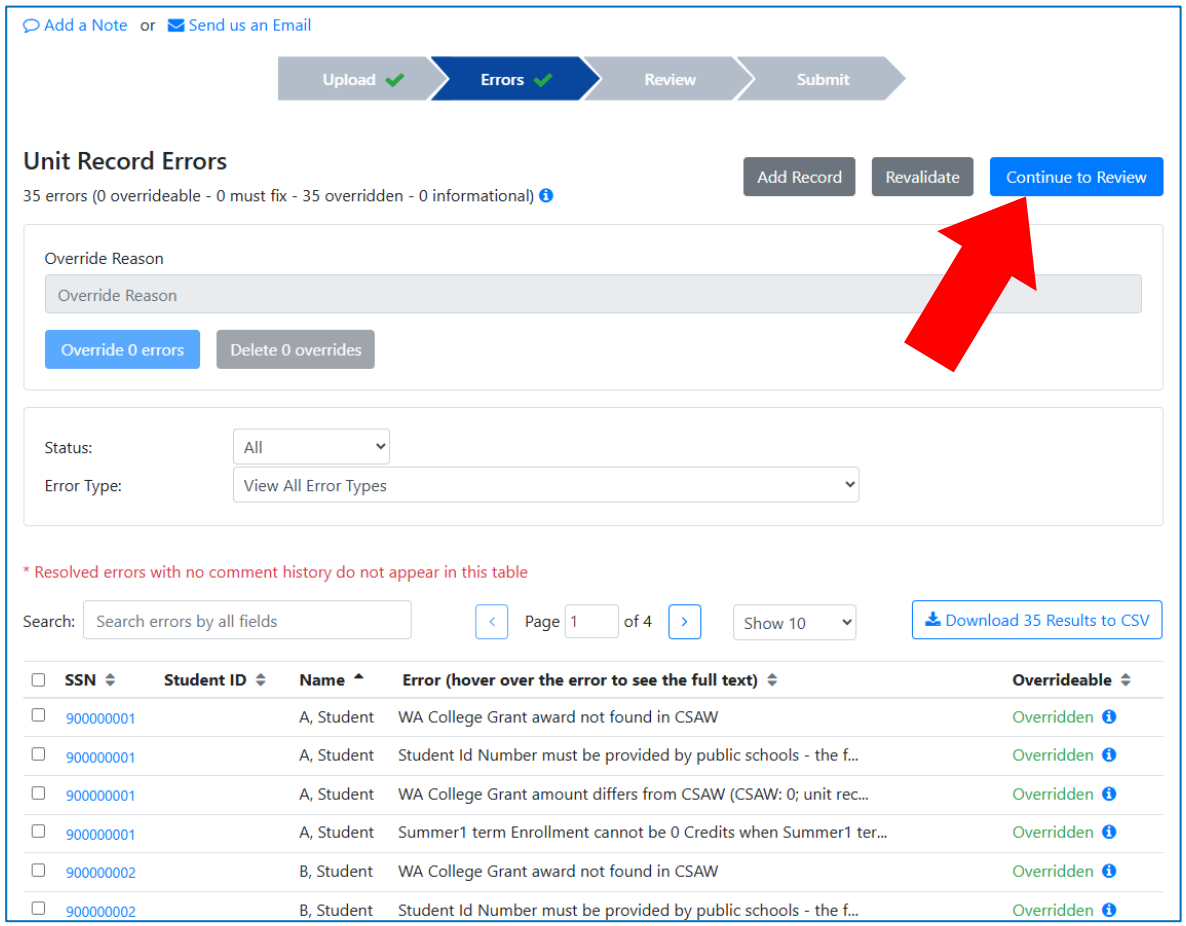
Then click the red "Confirm Delete" button.



The Overrides will be deleted from the selected records and returned to Overrideable, as shown below, and the User may then work the process to apply the appropriate Override Reason for those records.



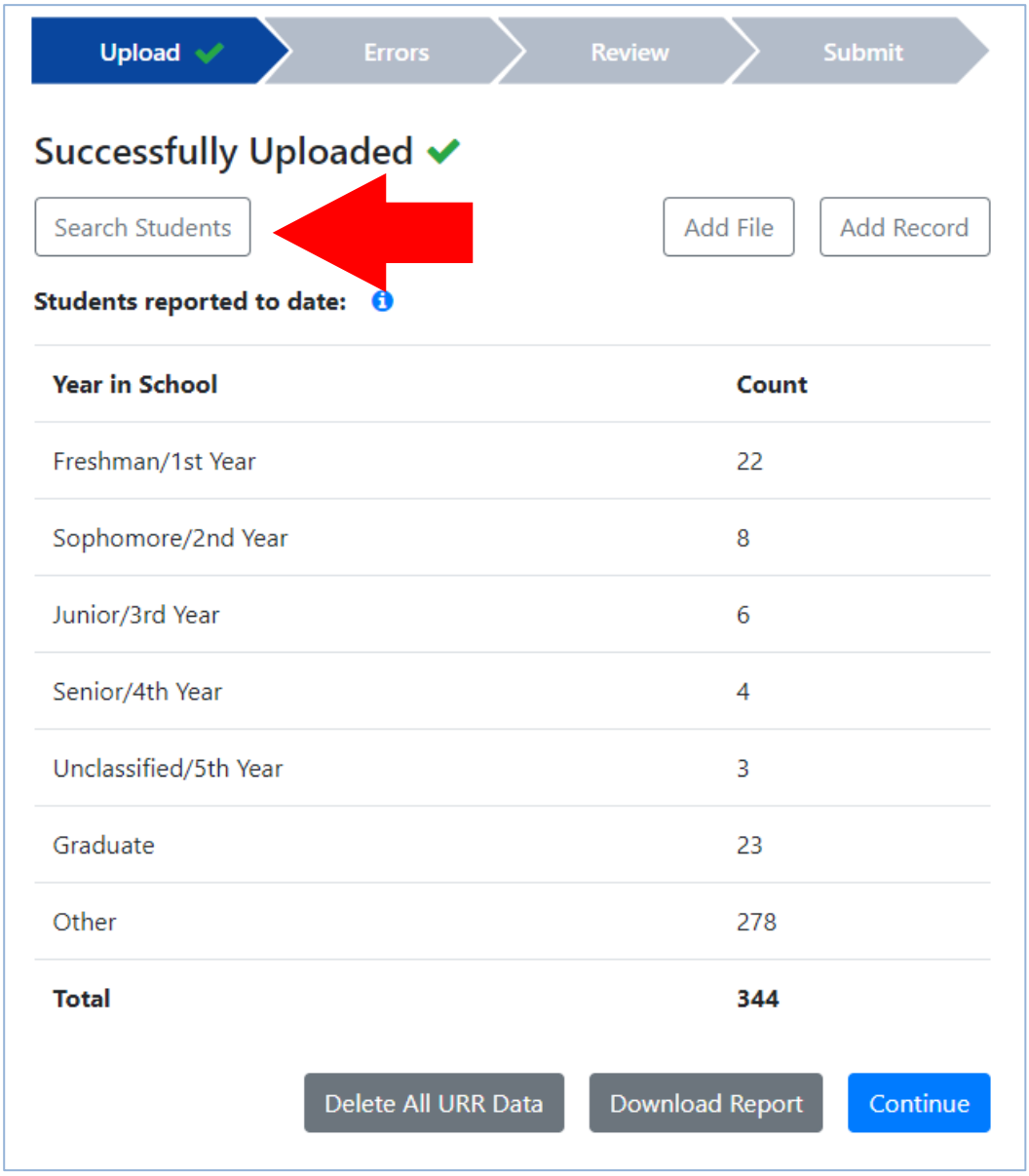
After all errors have been corrected or addressed with an Override Reason, the "Continue to Review" button will appear. Click the button to progress to the Review step of the URR Submit process.



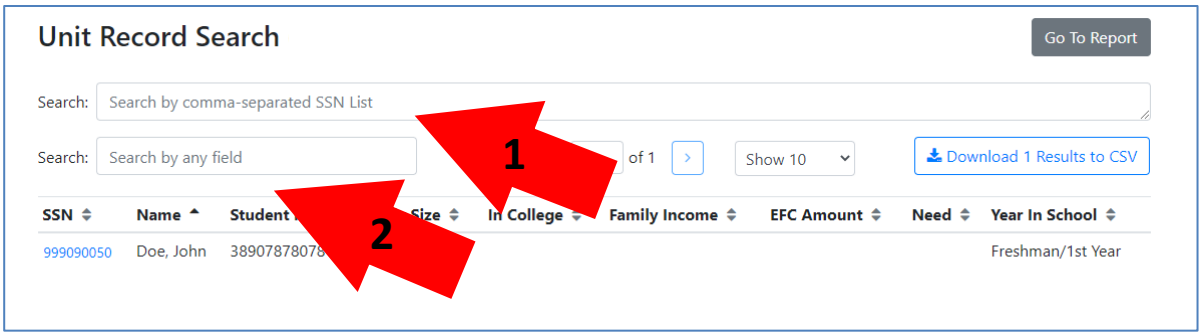
Search for Student Records in the Unit Record Report

For most URR Portal Users, student record searches must take place from the Upload screen. Navigate to the Upload screen, then click the “Search Students” button, which will open the general Search screen.

From the Upload screen:

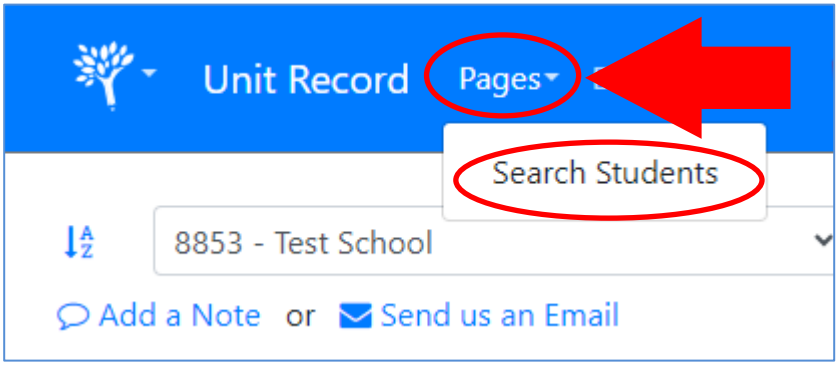


The general Search screen allows the User to either: (1) upload a comma-separated list of social security numbers or names in the top Search field, or (2) search by a single data element, such as an individual social security number, a name, or a numerical value (for example, 30000 which could bring up records with that value from the Search column headers shown).

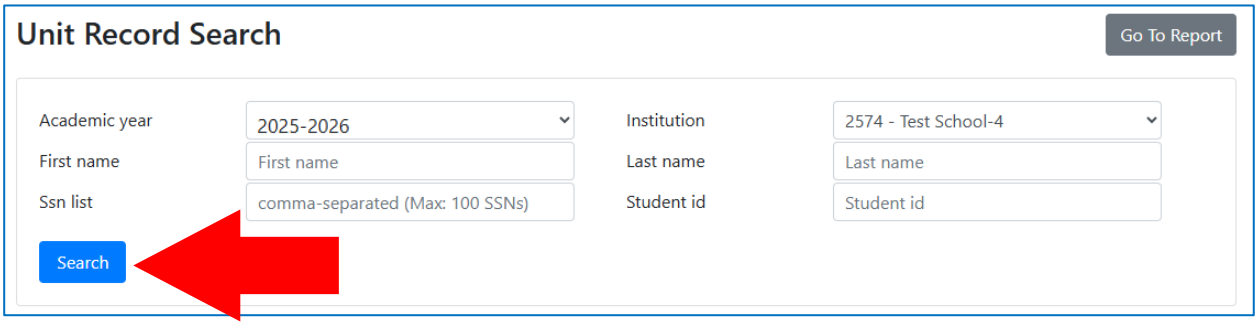


URR Portal Users with access to **multiple institutions** may search using the Upload screen, or select Search Students from the Pages menu dropdown menu at the top of the screen:

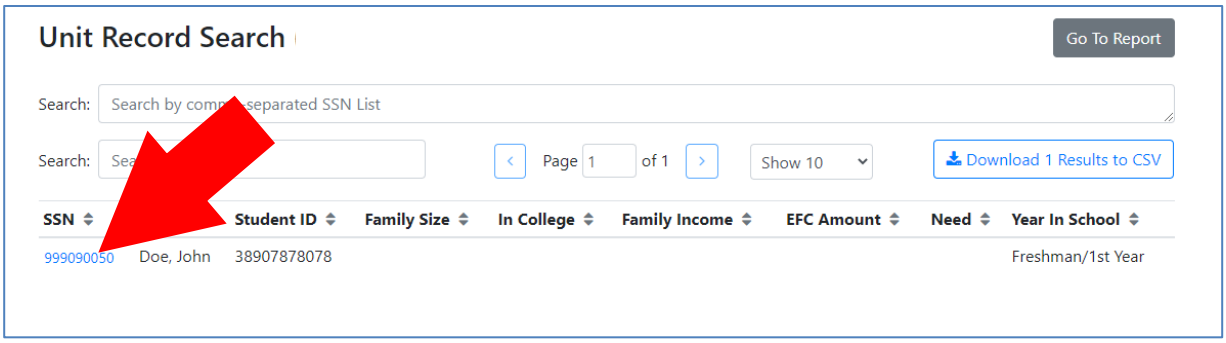
Multi-institution Portal Users may click Pages, and then Search Students to open the "Search" screen.



For Portal Users with multi-institution access, enter desired Search criteria in the available fields from the expanded Search screen, then click Search.

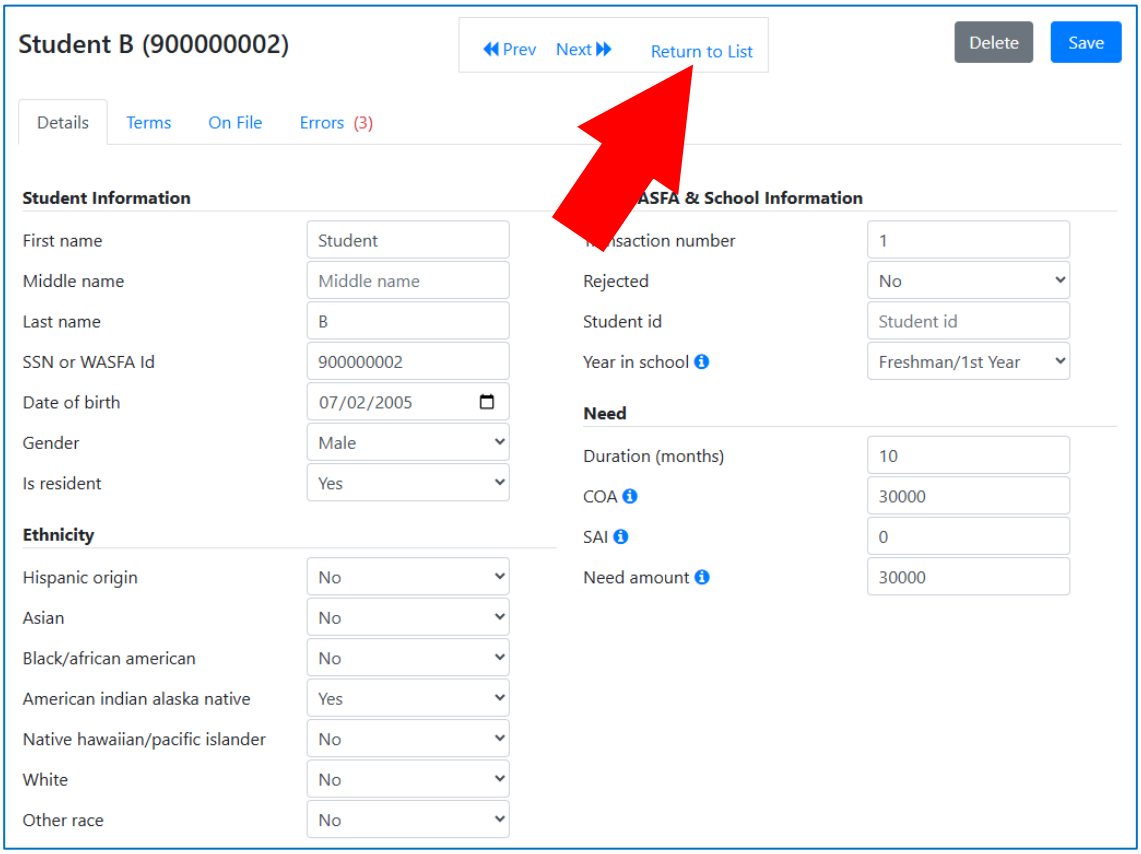


From either Search option, click the student's SSN to open the record.

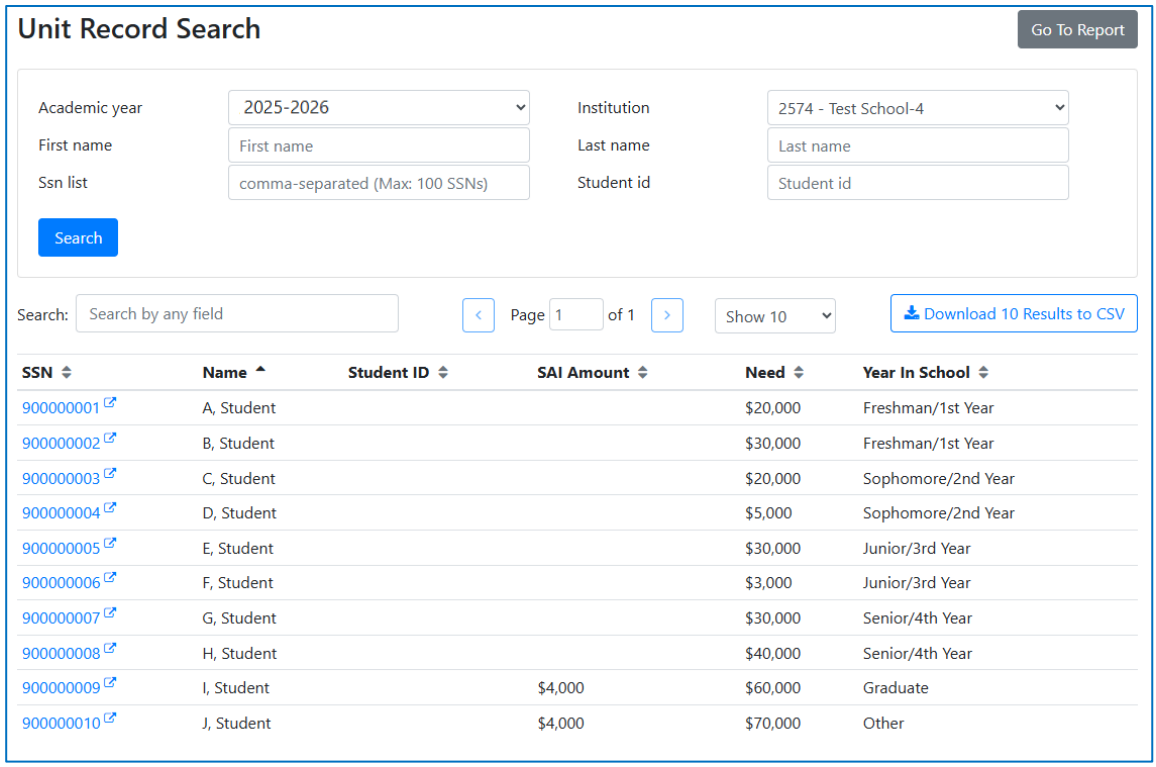


After entering the student record, the User can edit the record and save, or delete, the record (record deletions described in another section).

Click Return to List to return the User to the Search screen for additional searches.



After return to Search, additional Searches can be made from the full list of URR records.



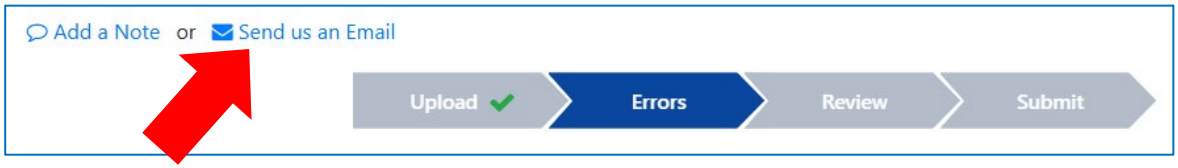
Resolving Social Security Number Differences

Clues to SSN issues include errors showing duplicated records in the Errors screen for what appears to be the same student with different SSNs. The record with the incorrect SSN must be deleted after merging the award information into one record with the correct SSN. Or, the duplicated records under different SSNs may appear when the User reviews the Program Differences Report(s) just before submitting the URR.

There are two types of resolutions to Social Security Number (SSN) differences depending on where the incorrect SSN originates. Errors involving SSNs do not clear in the URR until the issue has been resolved in the appropriate location.

- If the incorrect SSN originated with the URR upload, the Institutional User must resolve the issue by correcting the SSN in the URR student record itself. Navigate to and open the student record, click the Details tab, clear the SSN field, and enter the correct number. Then click "Save." Delete the second record if there is duplication.

- If the incorrect SSN originated in the student's CSAW or other program records instead of the URR, WSAC assistance is required to make corrections in WSAC program records. Click the "Send us an Email" button from any available screen (located above the Navigation tabs).

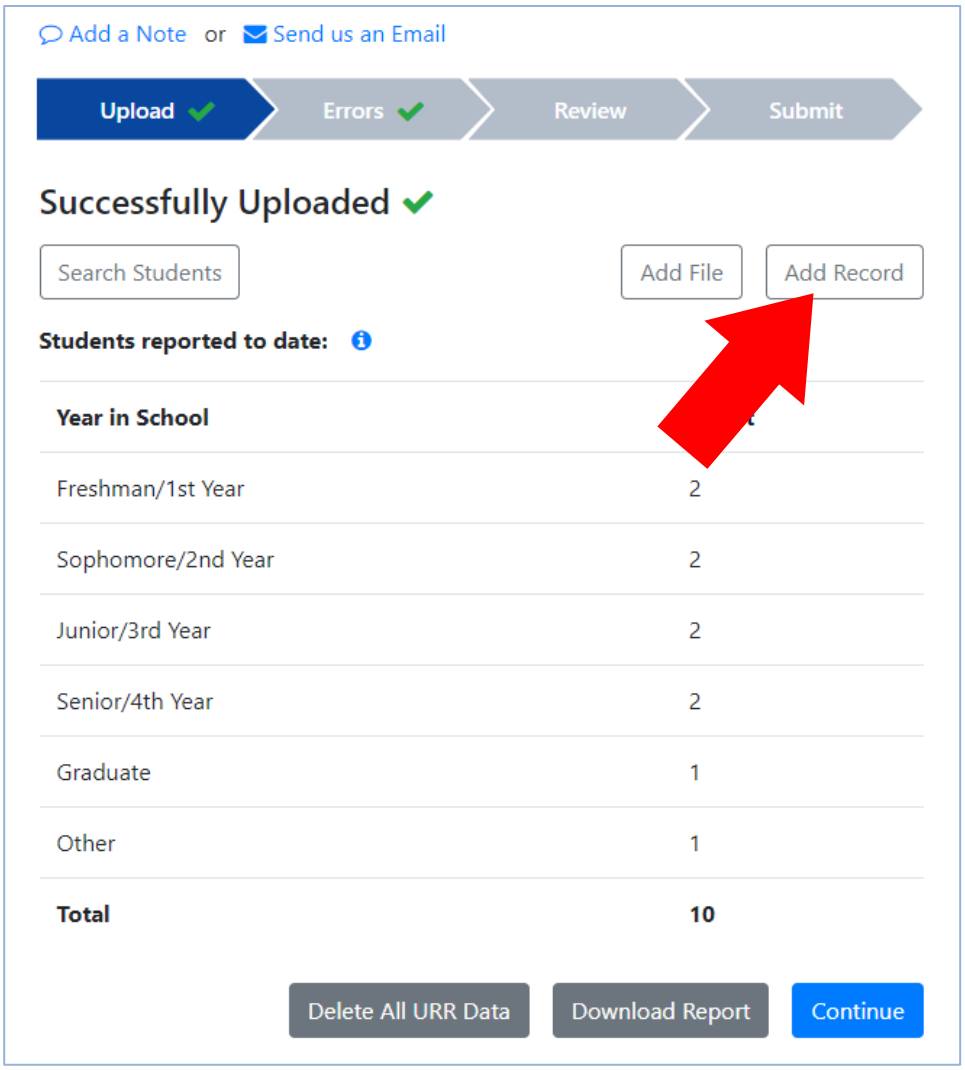


This will open the secure Portal email system and allow Users to create a secure Portal email to WSAC URR Team staff. Draft an email that includes the name of the student, the correct SSN (please mark for clarity), and the incorrect SSN (mark for clarity), and the program(s) involved. Send the secure email with the situational details to the Unit Record Report mailbox, and the URR Team members will initiate the SSN correction for you from the WSAC side of the Portal. **Remember**: The Portal email system is disabled and non-functional in the PortalTraining environment. You must send secure emails from the live, production Portal site only.

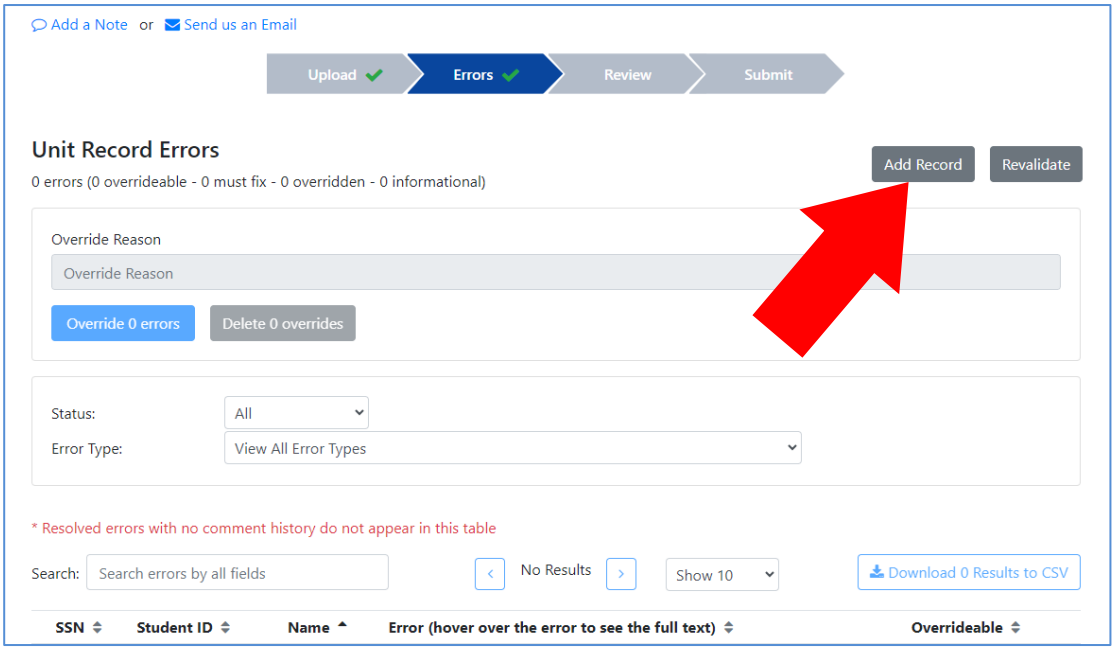
Manually Adding Student Records

To add an individual student record, click the "Add Record" button located on the Upload screen or on the Errors screen.

From the Upload screen, Users will see:

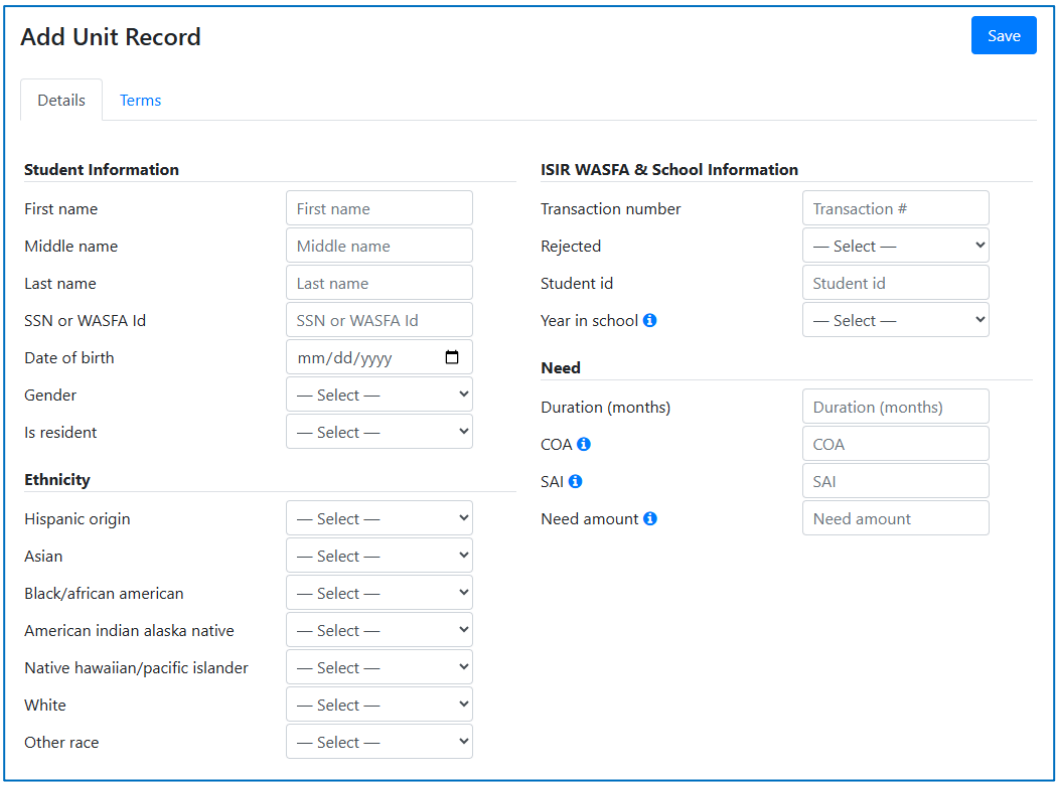


From the Errors screen, Users can click the “Add Record” button near the top of the screen:



Clicking “Add Record” from either location will open a blank student record form. Complete entry of student data in all required fields of the Detail and Terms screen.

Blank Detail screen view:



Blank Terms screen view (see screen with programs listed on next page):

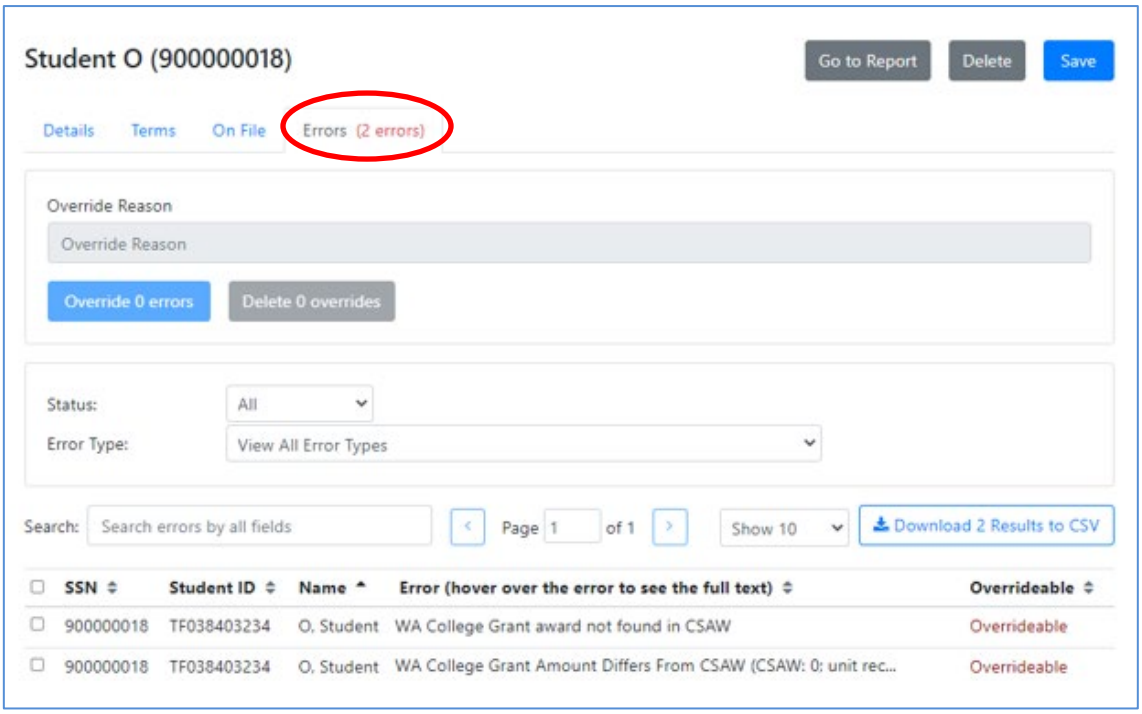
Add Unit Record

Save

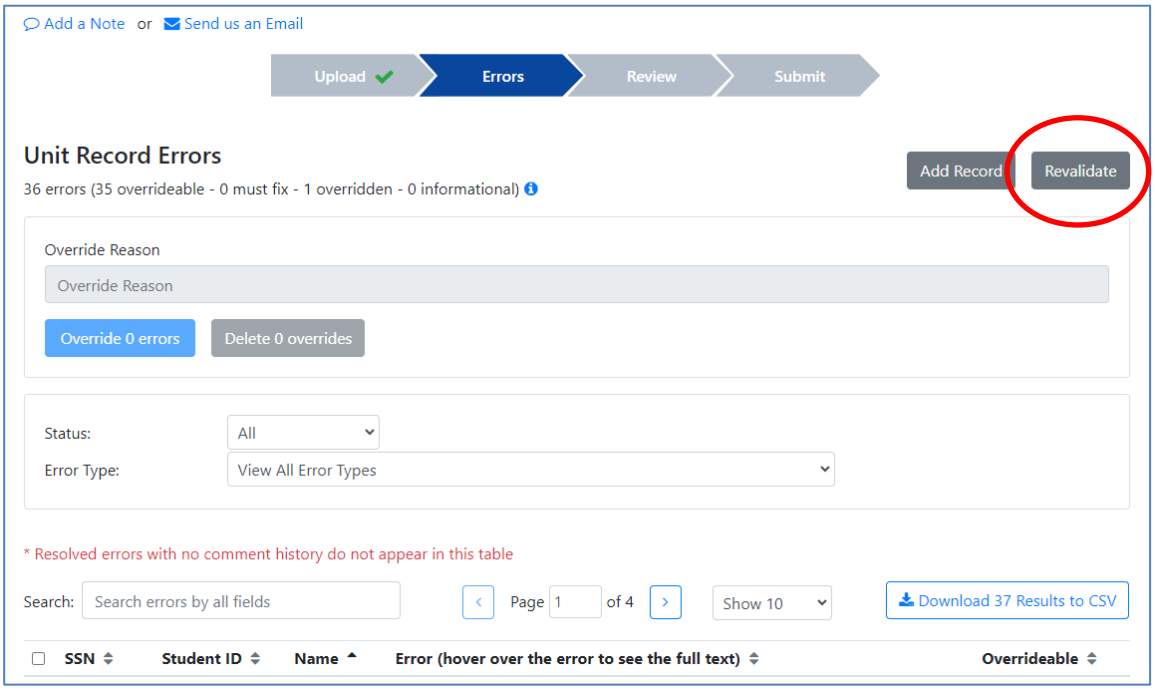
Details | Terms

Show All / Click to lock	Summer 1	Fall	Winter	Spring	Summer 2	Total
Credits	0 credits	0 credits	0 credits	0 credits	0 credits	
Federal						
Federal Pell Grant	0	0	0	0	0	0
Federal SEOG	0	0	0	0	0	0
Federal TEACH Grant	0	0	0	0	0	0
Federal Nursing Scholarships	0	0	0	0	0	0
Federal Work Study	0	0	0	0	0	0
Federal Nursing Health Loans	0	0	0	0	0	0
Federal Direct Subsidized Loans	0	0	0	0	0	0
Federal Direct Unsubsidized Loans	0	0	0	0	0	0
Federal Parent PLUS Loans	0	0	0	0	0	0
Federal Grad PLUS Loans	0	0	0	0	0	0
State						
WA College Grant	0	0	0	0	0	0
WG-A	0	0	0	0	0	0
WA Bridge	0	0	0	0	0	0
College Bound Scholarship	0	0	0	0	0	0
Passport to College Scholarship	0	0	0	0	0	0
Passport to College Incentive Grant	0	0	0	0	0	0
National Guard Grant	0	0	0	0	0	0
WAVE	0	0	0	0	0	0
Alternative Routes	0	0	0	0	0	0
Paraeducator	0	0	0	0	0	0
Teacher Shortage Conditional Scholarship	0	0	0	0	0	0
Teacher Grant Programs	0	0	0	0	0	0
Behavioral Health Conditional Scholarship	0	0	0	0	0	0
Substance Use Disorder Professional Grant	0	0	0	0	0	0
WSOS BA Scholarship	0	0	0	0	0	0
WSOS Career Tech	0	0	0	0	0	0
WSOS Grad Scholarship	0	0	0	0	0	0
WSOS Promise Scholarship	0	0	0	0	0	0
SBCTC Opportunity Grant	0	0	0	0	0	0
Other State Funded Gift Assistance	0	0	0	0	0	0
On Campus State Work Study	0	0	0	0	0	0
Off Campus State Work Study	0	0	0	0	0	0
WorkForce Training Funds	0	0	0	0	0	0
Emergency Aid	0	0	0	0	0	0
Institution						
Need Based Institutional Gift Aid	0	0	0	0	0	0
Non-Need Based Institutional Gift Aid	0	0	0	0	0	0
Institutional Employment	0	0	0	0	0	0
Institutional Loans	0	0	0	0	0	0
Other						
Conditional Loans	0	0	0	0	0	0
Private Loans	0	0	0	0	0	0
Other Loans	0	0	0	0	0	0
Outside Scholarships	0	0	0	0	0	0
VA Benefit	0	0	0	0	0	0
Other Agency Assistance	0	0	0	0	0	0
Total	**0**	**0**	**0**	**0**	**0**	**0**

Click the Save button to save and retain the completed record. The User generally will receive immediate feedback in the student's Errors screen if any errors are flagged in the new record.



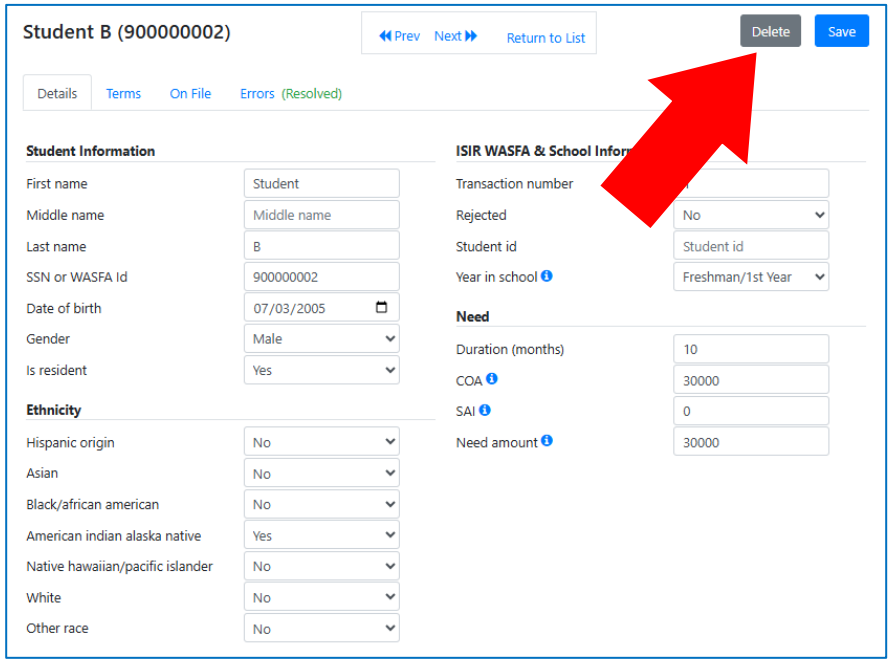
It is recommended that the User click "Revalidate" after returning to the institution error screen to ensure any new errors have been captured and resolved.



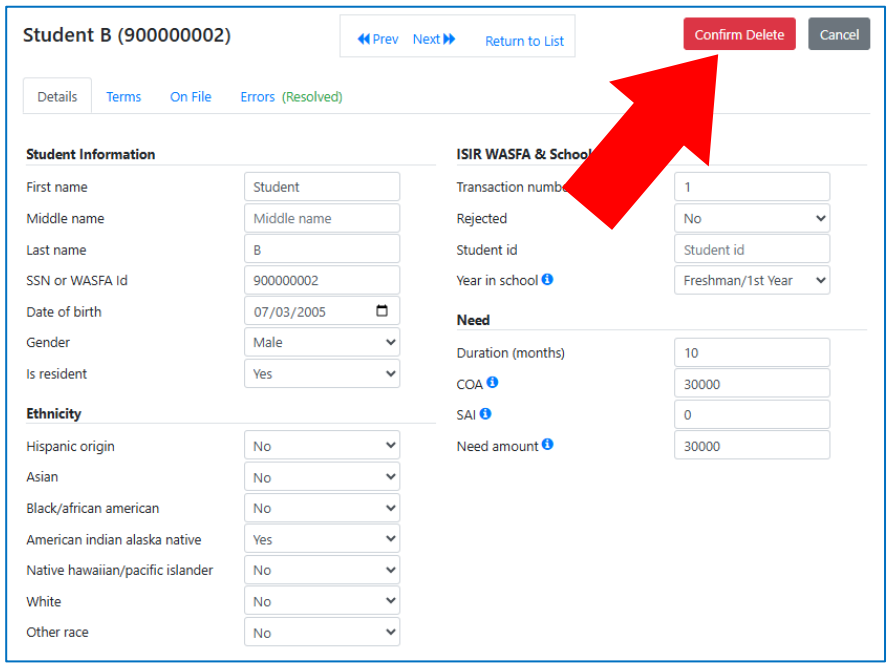
Manually Deleting Student Records

Individual student records can be manually deleted, except for those that have existing WSAC-funded program Portal payments or were auto-added to the URR. Attempting to delete such records will trigger an error message that must be overridden with an explanation. If the school will be returning funds to WSAC, include that detail in the override comment.

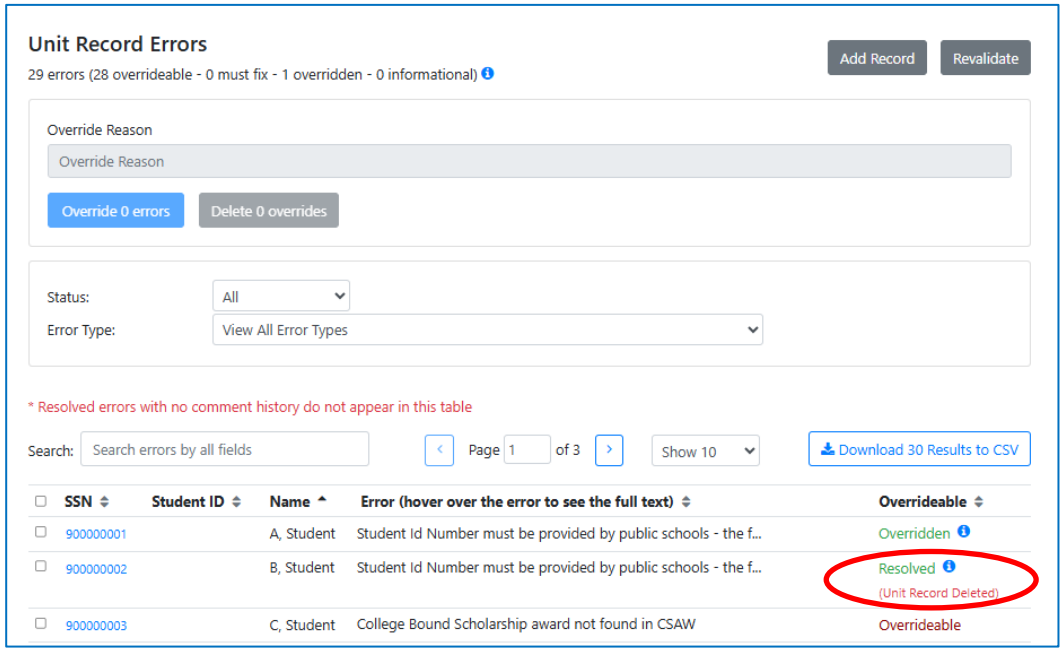
To delete a student record, navigate to the record by way of the Search screen or by clicking the student's SSN from the main Error menu. After opening the record, click the "Delete" button in the upper right portion of the screen.



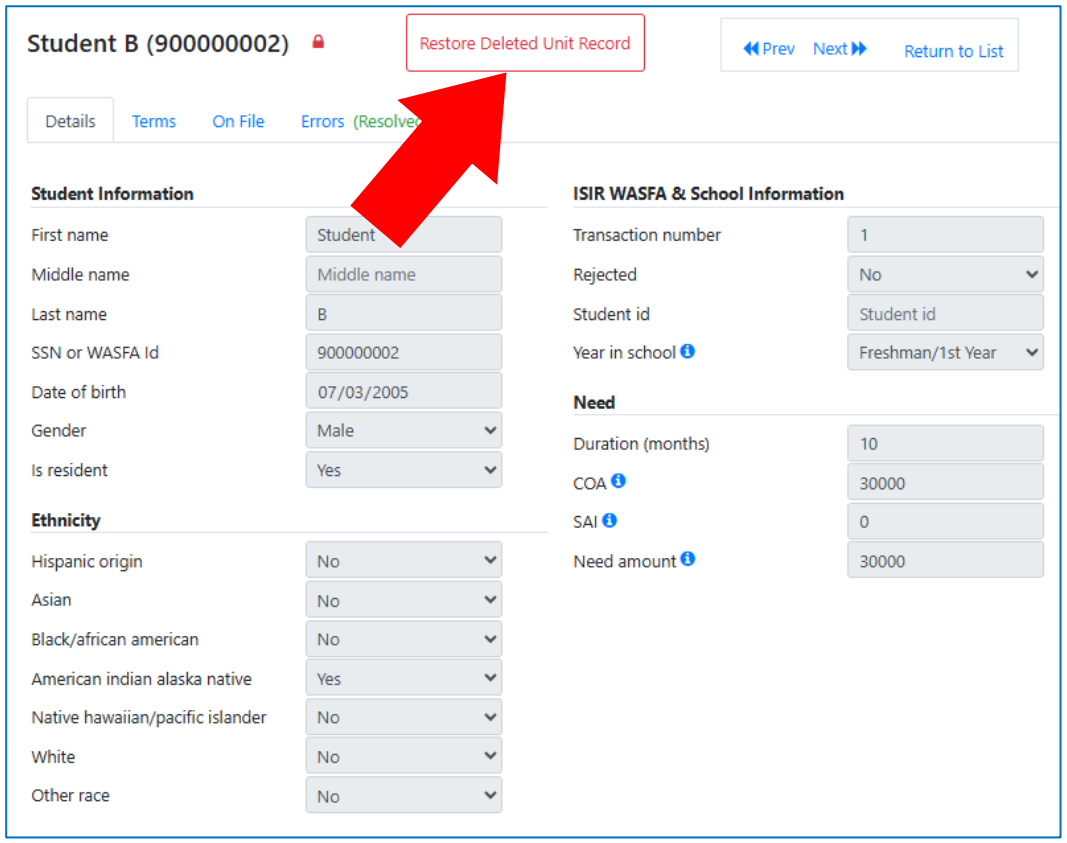
You will be asked to confirm the deletion.



Records deleted by Users that initially appeared in the Error list will continue to appear in the list with the notation "(Unit Record Deleted)."

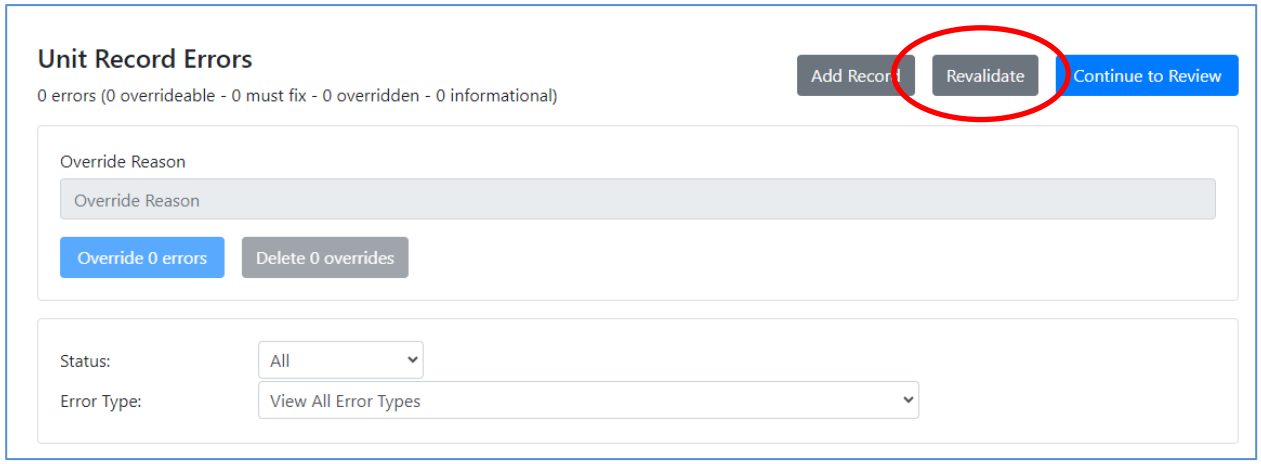


The record can be restored by clicking the highlighted SSN to open the record and clicking the "Restore Deleted Unit Record" button.



Deleted records that did not appear in the Error list may be located by using the Search function to confirm the deletion, or to restore a mistakenly deleted record as described above.

Be sure to click the “Revalidate” button after returning to the main Error screen to ensure that any new errors will be captured and addressed.



Supplemental File Uploads to Add/Delete/Edit Multiple Records Simultaneously

Supplemental files may be uploaded after an initial URR file upload to add new records, delete records, or to edit/correct records already uploaded. The supplemental file may contain records that are a mixture of these change types.

- Supplemental files must include a valid .csv header row at the top of the file and include full data for each student record included. Partial information will cause an existing record to lose data or generate errors in newly added records.

- If modifying records already uploaded to the URR, Users must be careful to include full data for the student and edit only those fields that require change without omitting valid existing data. Data in the supplemental file will overwrite the original upload information for existing records identified to the student SSN. Omitted data may trigger new errors.

- To delete an existing student record in the URR, enter “True,” “Yes,” or “Y” in the IsDelete field for the record to be removed from the URR. Remember, records with awards in CSAW or other Portal programs cannot be deleted but will appear in the URR with errors that must be corrected if a deletion attempt is performed.

- To add a new student record to the URR, enter “False,” “No,” or “N” in the IsDelete field for the record to be added to the URR.

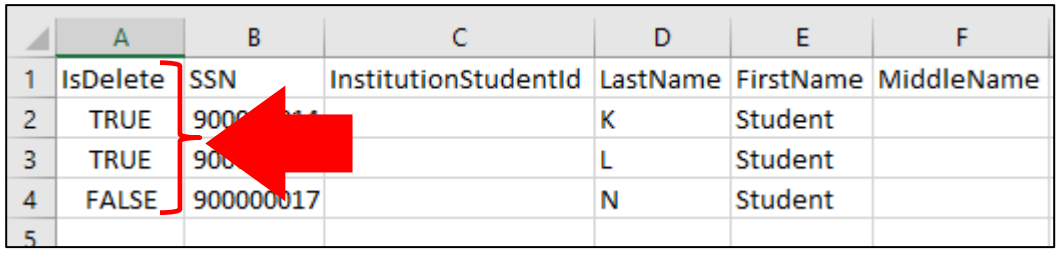
- To modify data for an existing student record in the URR, enter “False,” “No,” or “N” in the IsDelete field and edit only those fields that need update while leaving all other data intact in that student’s row.

- Successful Supplemental file uploads cannot be reversed or deleted. (Clicking “Discard All URR Data” after a successful Supplemental file upload will fully delete the entire URR data file and not just the Supplemental file.) Users must edit those records by opening the records from the Search or Errors screens OR upload a compensating supplemental file to undo the original add/delete/modifications.

- Unsuccessful Supplemental file uploads must be discarded immediately after upload if the Upload is shown as rejected with “critical errors.” If the Supplemental file does not upload successfully, Users must click the “Try Again” button to discard the failed supplemental upload without affecting pre-existing data.

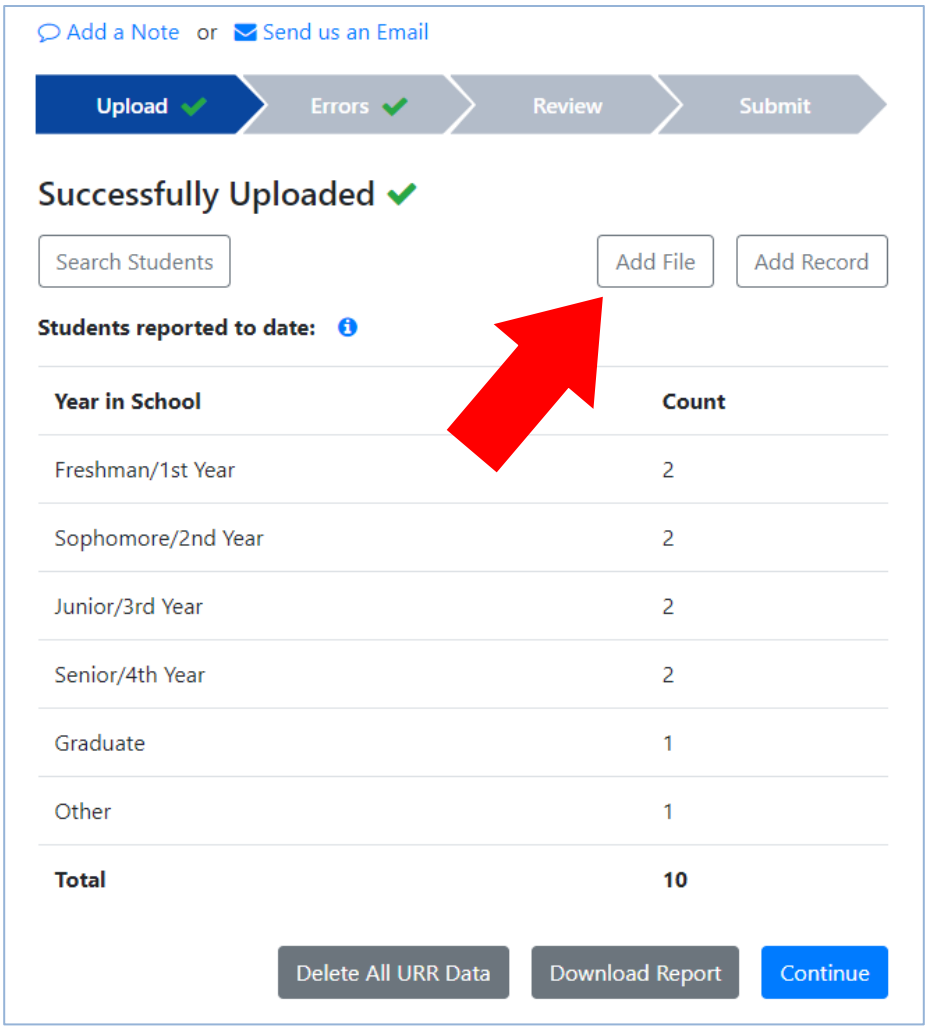
- Click the “Revalidate” button at the top of the main Errors screen after processing a Supplemental file upload to capture and address any new errors. Neglecting to do so may allow errors to remain hidden until revealed when errors are reprocessed just before completing the URR Submit procedure.

A cut-away example of the “IsDelete” field is shown below, bracketed in red, for two record deletions and one record addition/modification. Complete data for these students must be included in the supplemental upload file but is not shown here due to space limitations.

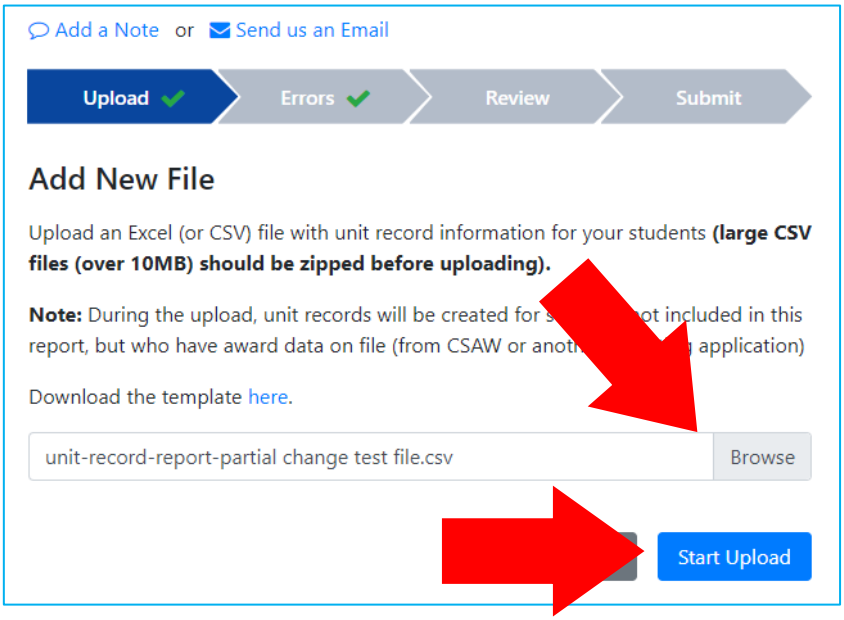


	A	B	C	D	E	F
1	IsDelete	SSN	InstitutionStudentId	LastName	FirstName	MiddleName
2	TRUE	900		K	Student	
3	TRUE	900		L	Student	
4	FALSE	900000017		N	Student	
5						

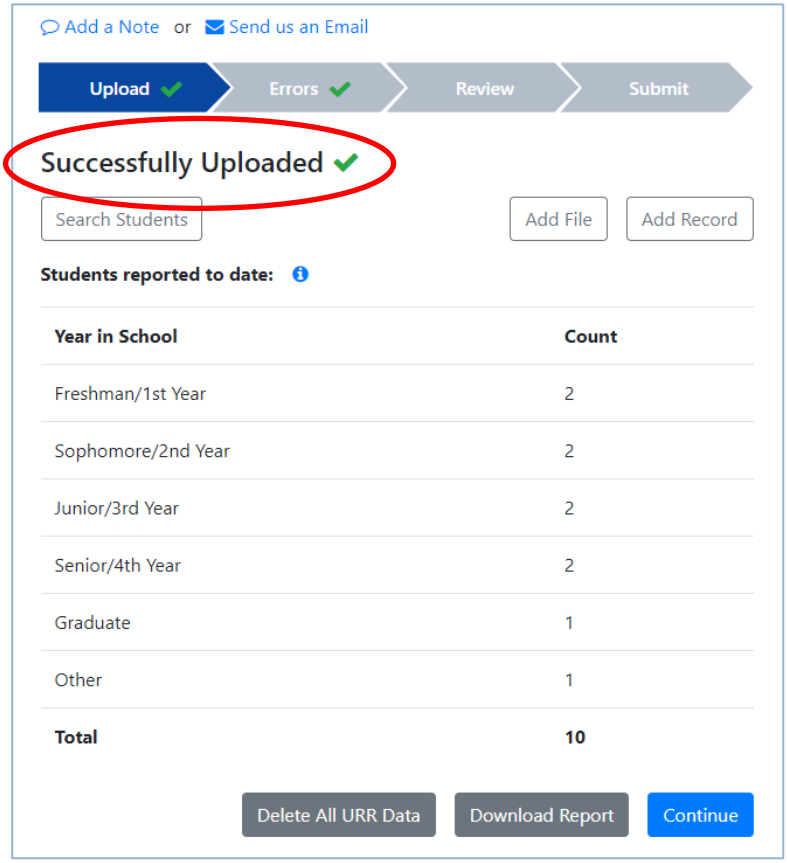
After creating the supplemental file containing any changes the User will make to existing URR data, navigate to the Upload screen and click “Add File.”



The "Add New File" screen will open. Browse and open the supplemental upload file from the User's file directory. Click "Start Upload."

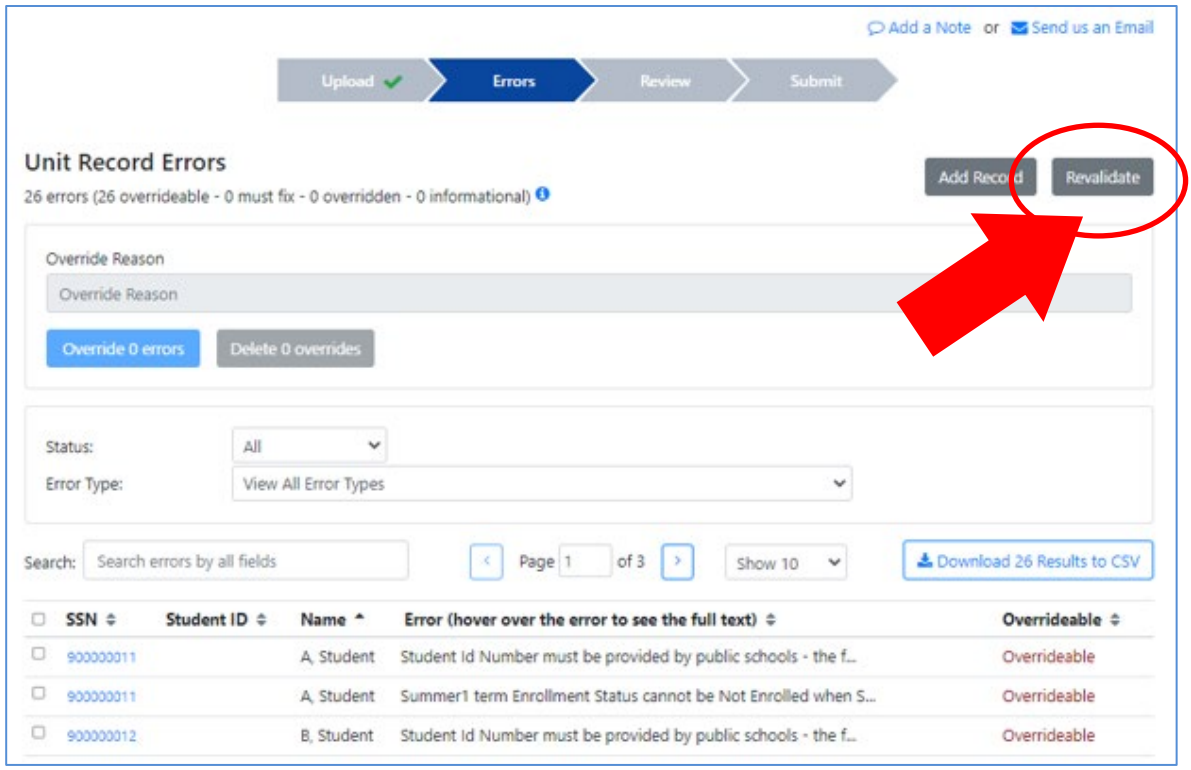


The User will receive the “Successfully Uploaded” message on the screen if the supplemental file upload is successful. The numbers in the “Year in School” categories and the Total will update to reflect any adds or deletes to the student records.



Users can navigate to the Search screen to double check adds and deletions.

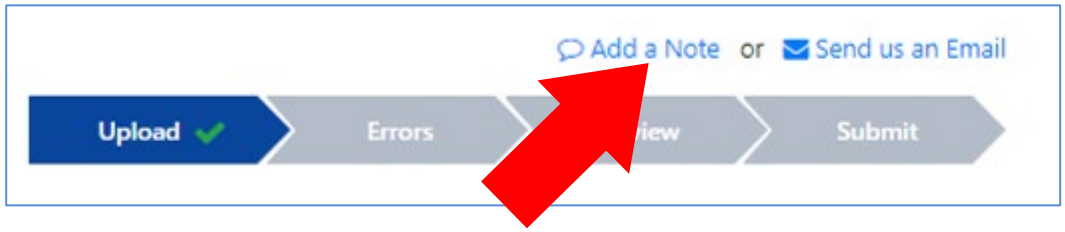
As mentioned in the Supplemental file summary for this section, remember to click the “Revalidate” button at the top of the main Errors screen after processing a Supplemental file upload of any type to capture and address any new errors. Neglecting to do so will cause any hidden errors to be revealed when errors are reprocessed just before completing the URR Submit.



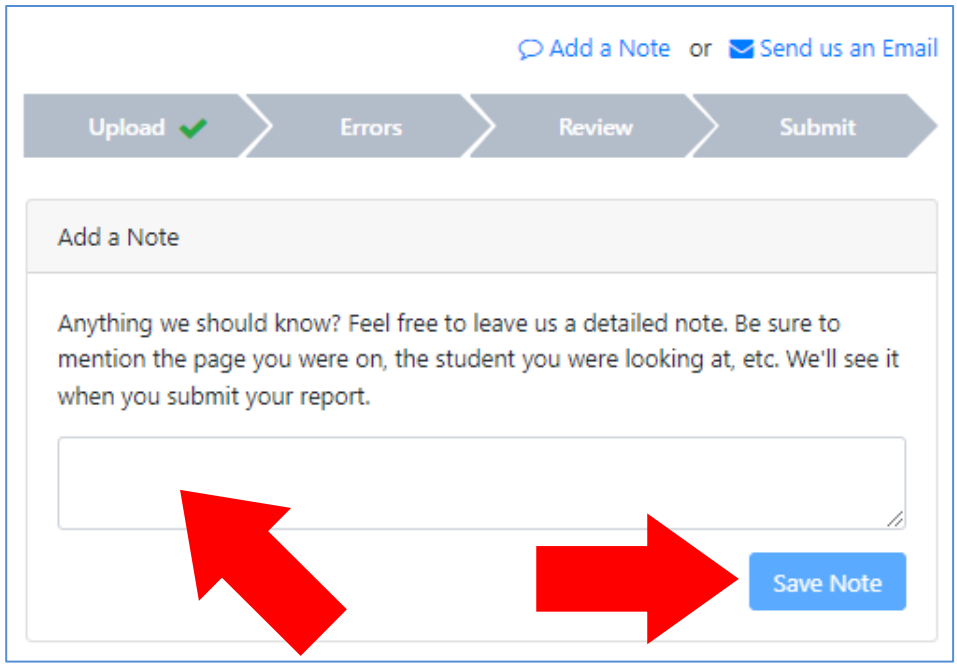
Adding Notes to the Unit Record Report

Institutions may add explanatory notes to the URR for WSAC staff to view after the URR has been submitted.

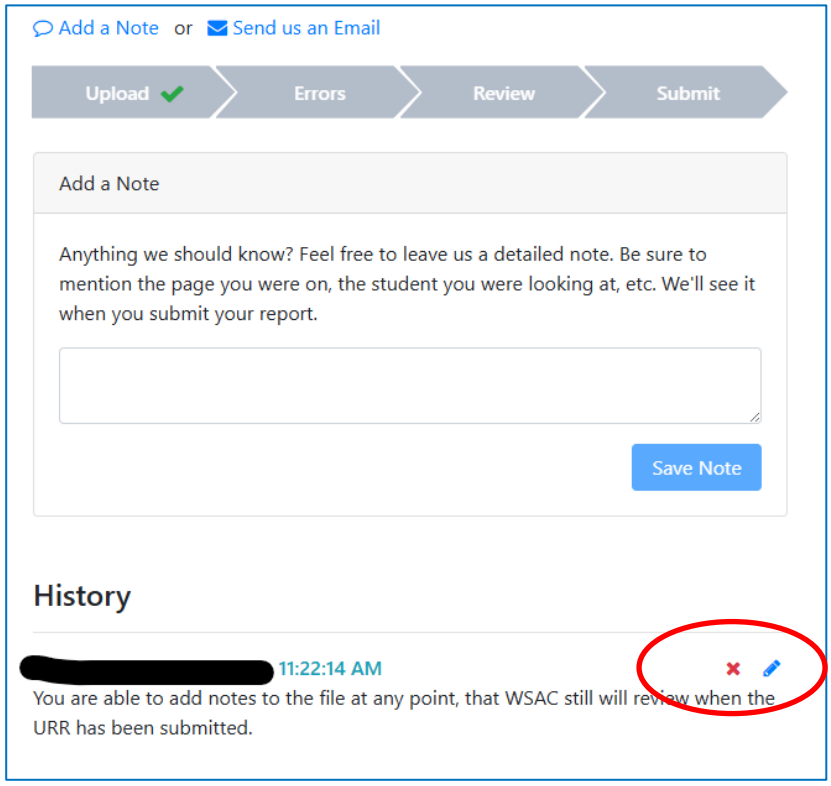
Wherever "Add a Note" is shown (essentially any screen in the URR), Users may now click the button to open a notes screen. Multiple notes may be entered and edited up to the time the URR has been submitted.



Enter remarks to the comment box, then click "Save Note." Notes are not affiliated with specific student records but to the overall URR generally. If the Note relates to a specific student record, be sure to include the student's name and SSN information to the comment box.



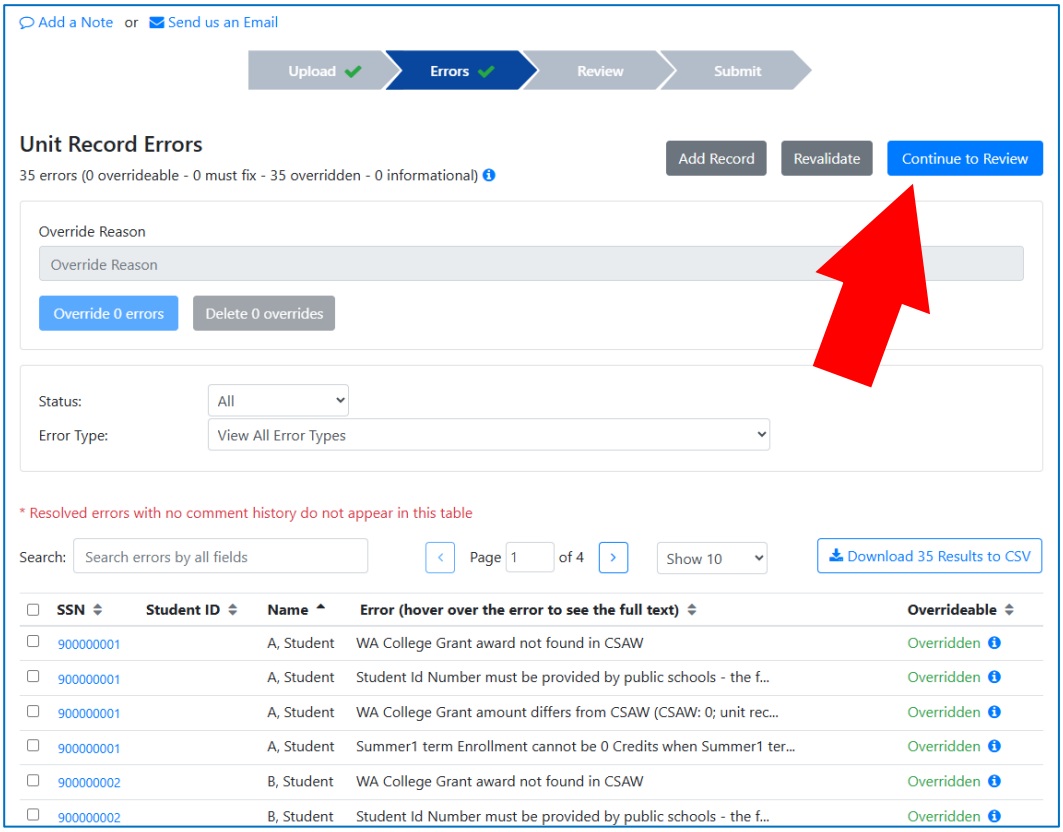
Users can delete or edit their Notes up to the time the URR is submitted by clicking the red "X" to delete or the blue pencil icon to edit the Note. Multiple Users for an institution may add new Notes to the URR. Existing Notes may only be edited and saved by the original Note writer.



After saving the Note, Users may navigate back to their working screen (Upload, Errors, Review, or Submit) by clicking the Navigation menu tab. Remember that work in each Navigation tab must be completed before the "Continue" button appears and the User can move the Submit process forward.

Review and Submit the Unit Record Report

After addressing all Overrideable, Must Fix (Non-Overrideable), and correctable "Informational" errors listed in the Error screens, click the "Continue to Review" button that will appear on the upper right-hand edge of the Error screen.



The next screen will display a copy of the preliminary Program Totals Report. An abbreviated/truncated view of the Preliminary Totals Report is shown on the next page (the report is too long to include a view of all program reporting categories in a single screenshot).

Review the current year data to determine if any program data are missing or if unusual patterns are present in your Totals comparisons. Please contact WSAC staff to discuss available options if that is the case.

WSAC suggests that institutions download and save a copy of the preliminary report as a PDF from this screen for their records. A copy of the final report should be downloaded and saved as a comparison when it is released in January. The final Program Totals report released in January does not include data for students who received only non-need-based aid (that is, not one dollar of need-based aid) and no federal loans.

If everything in the Preliminary Totals Report appears reasonable, press the "Confirm Report" button.

Add a Note or Send us an Email

Upload ✓ | Errors ✓ | Review | Submit

Program Totals Report

Confirm Report

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

We recommend that you review the Program Totals Report, below, to do an overall assessment of your current dat re are any programs missing or unusual patterns present in your totals comparisons. Contact WSAC staff for further advice if you find he 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 Final Institutional Totals Report after all URRs are finalized.

Show All

Download PDF

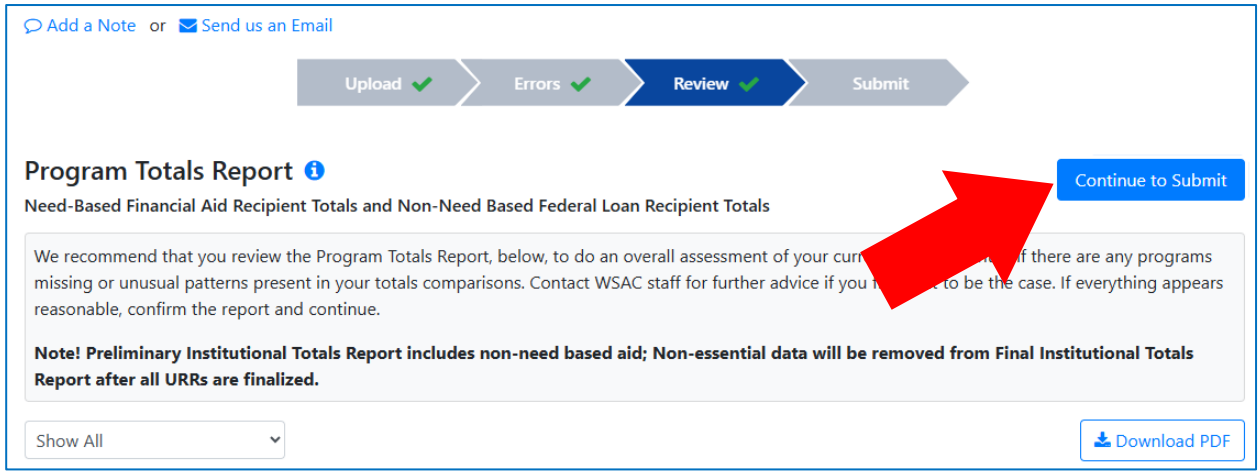
	2022-2023		2023-2024		2024-2025		2025-2026		% Change	
Federal Aid	Awards	Amount	Awards	Amount	Awards	Amount	Awards	Amount	Awards	Amount
Federal Pell Grant	147	$737,903	139	$671,728	151	$825,701	195	$1,079,809	29.1%	30.8%
Federal SEOG	86	$117,950	78	$123,078	123	$117,949	97	$91,283	-21.1%	-22.6%
Federal 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	42	$72,257	43	$104,425	45	$104,416	44	$109,046	-2.2%	4.4%
Federal Perkins Loan	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	0.0%	0.0%
Federal Grad PLUS Loan	0	$0	0	$0	0	$0	0	$0	0.0%	0.0%
Federal Parent PLUS Loan	90	$2,472,318	88	$2,404,288	92	$2,759,611	103	$3,350,279	12.0%	21.4%
Federal Nursing Health Loan	0	$0	0	$0	0	$0	0	$0	0.0%	0.0%
Federal Direct Subsidized Loan	224	$980,152	226	$962,226	255	$1,045,109	238	$954,358	-6.7%	-8.7%
Federal Direct Unsubsidized Loan	239	$817,254	242	$800,150	268	$912,307	266	$866,999	-0.7%	-5.0%
		$5,197,834		**$5,065,895**		**$5,765,093**		**$6,451,774**		**11.9%**

*** *** *** ***

	2022-2023		2023-2024		2024-2025		2025-2026		% Change	
Other Aid	Awards	Amount	Awards	Amount	Awards	Amount	Awards	Amount	Awards	Amount
Conditional Loans	0	$0	0	$0	0	$0	0	$0	0.0%	0.0%
Private Loans	27	$592,372	45	$1,020,504	56	$1,343,597	45	$1,098,694	-19.6%	-18.2%
Other Loans	0	$0	0	$0	0	$0	0	$0	0.0%	0.0%
Outside Scholarships	24	$114,714	29	$137,974	30	$129,539	38	$240,996	26.7%	86.0%
Other Agency Assistance	0	$0	0	$0	0	$0	0	$0	0.0%	0.0%
VA Benefit	0	$0	0	$0	0	$0	0	$0	0.0%	0.0%
		$707,086		**$1,158,478**		**$1,473,136**		**$1,339,690**		**-9.1%**

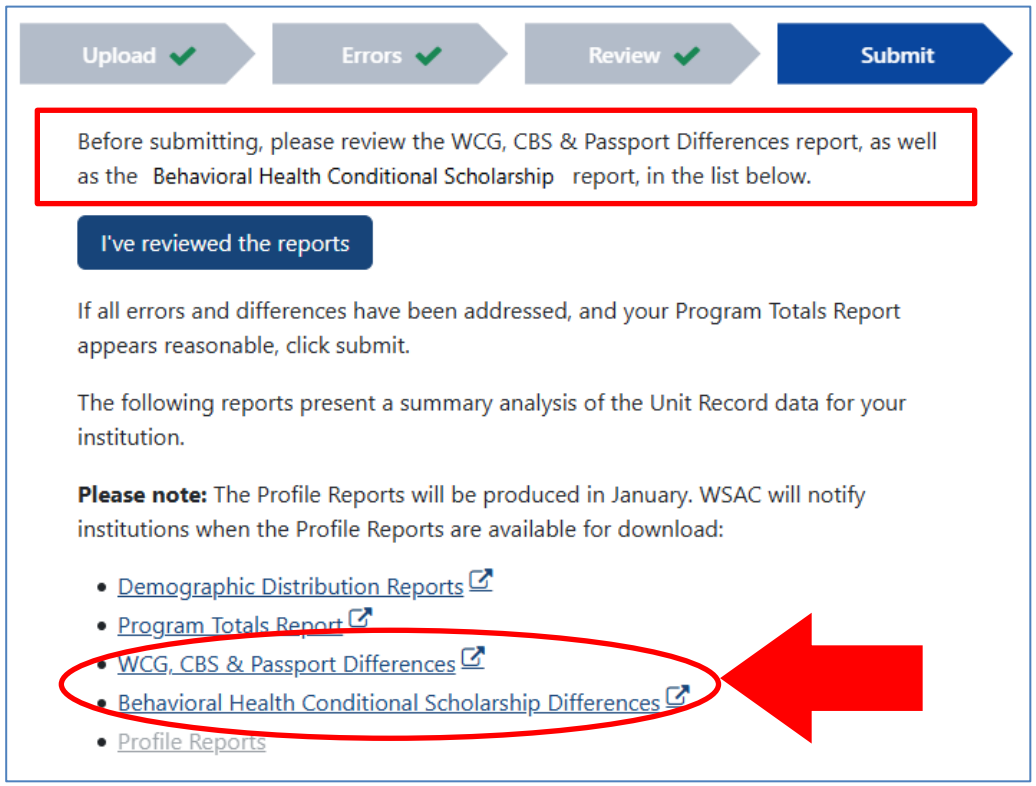
	2022-2023	2023-2024	2024-2025	2025-2026	% Change
Total Aid	**$9,608,312**	**$10,035,005**	**$13,102,049**	**$15,370,446**	**17.3%**
Unduplicated Student Count	**331**	**313**	**344**	**485**	**41.0%**
Average Aid Per Student	**$29,028**	**$32,061**	**$38,087**	**$31,692**	**-16.8%**

Then click “Continue to Submit.”

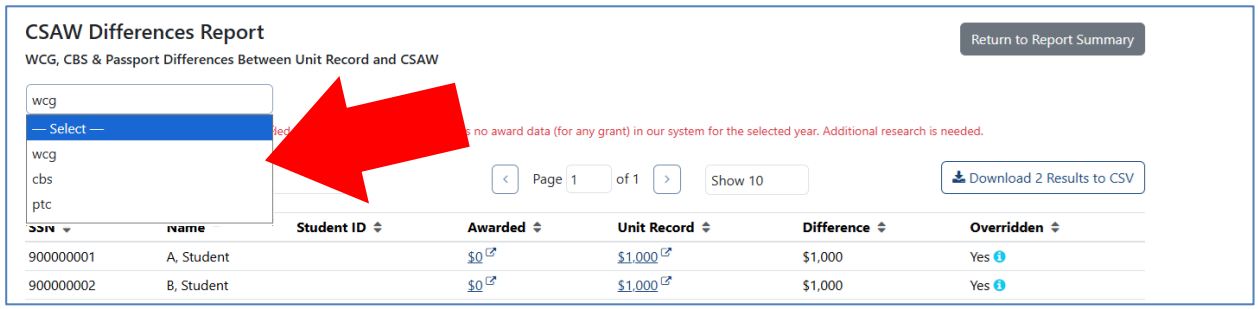


Differences Reports for WCG, CBS, PTC, & Behavioral Health Conditional Scholarship

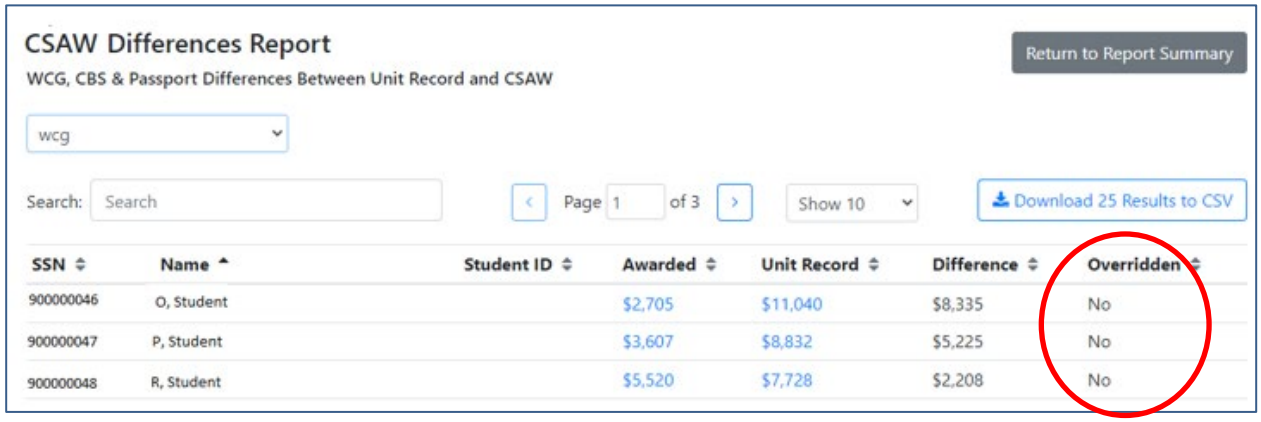
From the Submit screen, Users must review and address any discrepancies that may appear in the “WCG, CBS & Passport Differences” and Behavioral Health Conditional Scholarship Reports. Click the report name to open the screen to view the four reports.

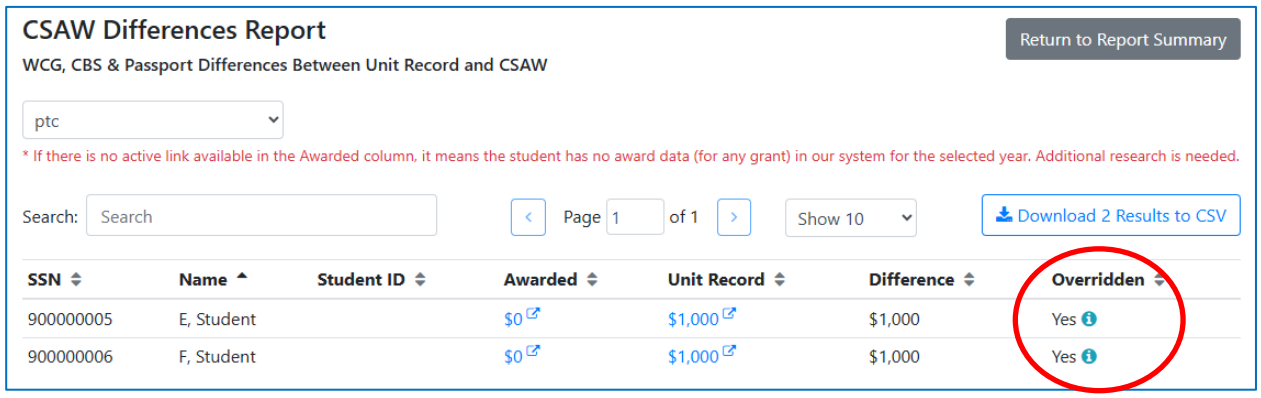


Each Differences report is individual to the program. Select each program report to view from the dropdown box. Few differences, if any, are expected at this point due to the auto-addition of WSAC program-related records at Upload and the Error process, but this is a final opportunity to correct any records before URR submission. If differences exist, Users are expected to adjust the records to clear the differences before submitting the report.



Example of CSAW WCG Differences Report with unresolved differences remaining (see "No" in Overridden column; "Yes" indicates that an Override comment has been entered.):





Review each individual program report to identify if there are any unresolved differences between the CSAW or other Portal records for Washington College Grant (WCG), College Bound Scholarship (CBS), Passport to College (PTC) data, and BHCS, and the URR.

- "Yes" in the Overridden column confirms differences already addressed through an override request. It may signal student social security number differences (corrections in progress or yet unresolved) or an action that must be completed, such as a pending return of funds from the school to balance the student account.

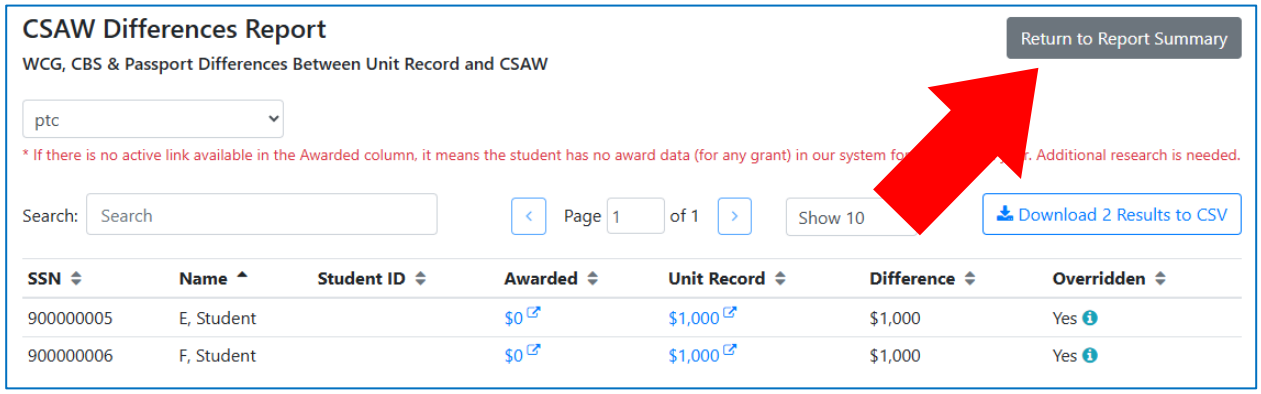
- Differences that need to be addressed show "No" or a blank in the "Overridden" column. Click the "Download differences to csv" button to download a separate file and review unaddressed data errors that still need correction or to identify missing student records that require addition to the URR.

- To add missing WCG/CBS/PTC and BHCS data for student records that already exist in the URR upload, return to the Errors tab or navigate to the "Search" function in the Pages menu bar to locate and open the student record for adjustment.

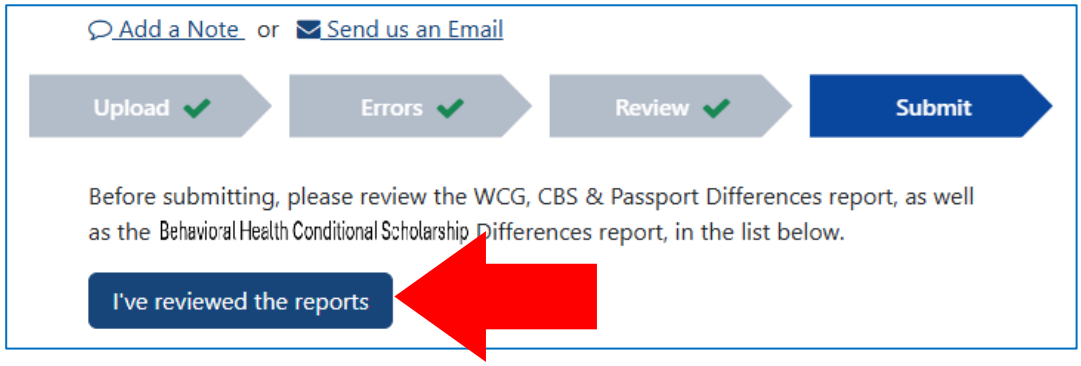
- If a student record is missing from the URR entirely, see the section, "Manually Adding Student Records," for instructions.

If you submit the URR with significant differences, WSAC staff will contact you to resolve any questions about those differences before WSAC finalizes the report.

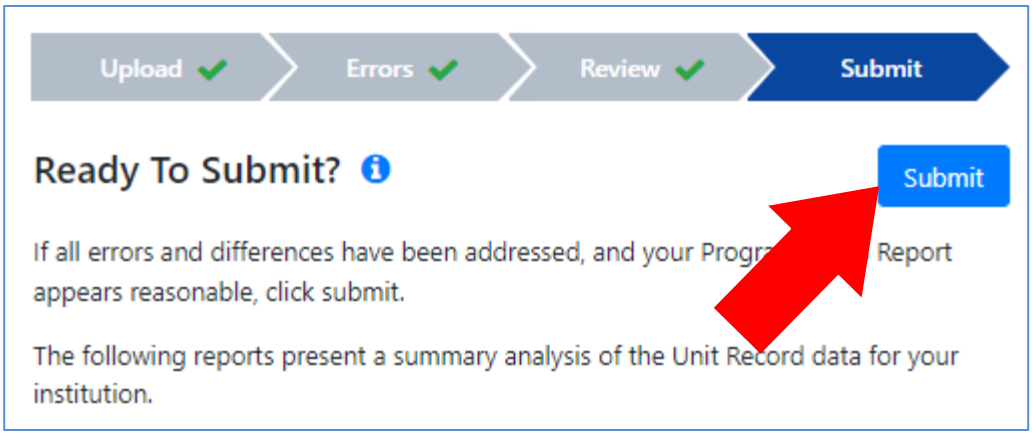
After completing the Differences Reports review and performing any yet-unaddressed record adjustments, click the "Return to Report Summary" button which will return the User to the "Submit" screen.



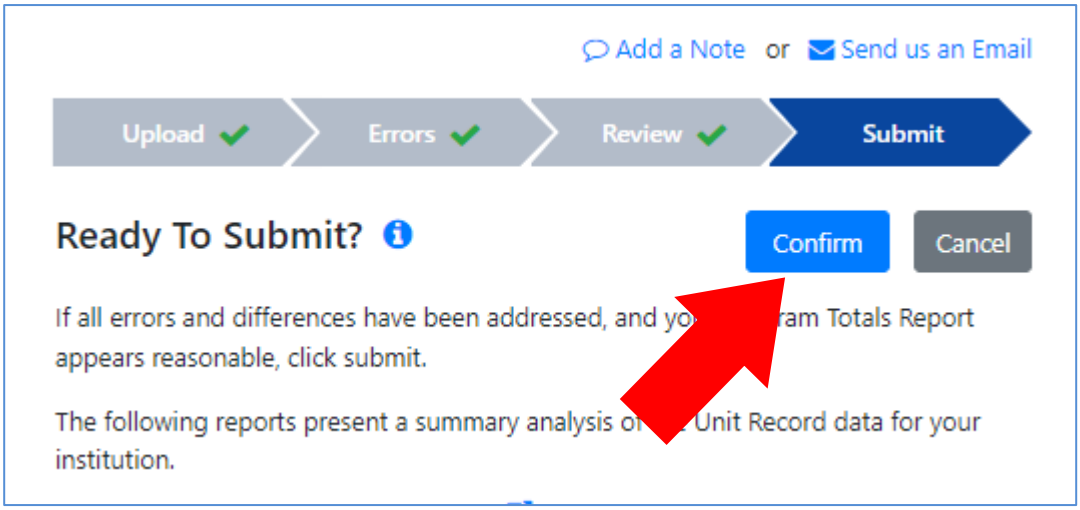
If all data appears reasonable, click "I've reviewed the report."



Then, click "Submit."



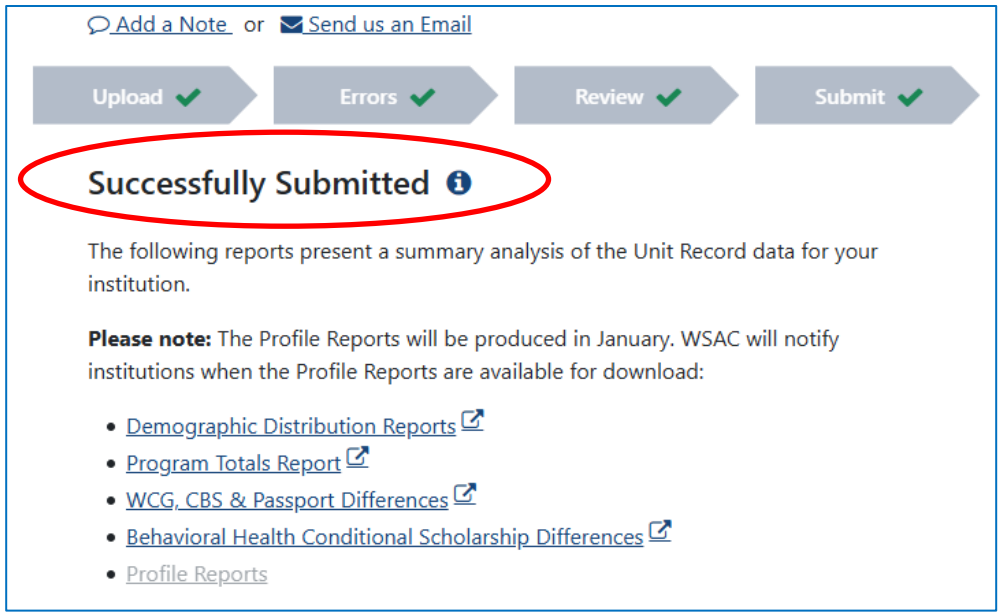
Next, click the "Confirm" button if you're sure that no additional changes need to be made in the URR. Once the URR has been submitted, the institutional User will be unable to re-enter the URR without WSAC URR Team staff assistance.



After the User clicks the "Confirm" button, the Portal will reprocess the file edits before the URR is submitted to WSAC. Newly discovered errors will produce an error message that will redirect the User back to the Errors screen to address any issues. Users must correct or enter Override comments for the new errors, then move through the Review tab again to re-review the WCG/CBS/PTC and BHCS Differences reports before clicking the "I have reviewed the report" and Submit buttons.

After submitting URR data successfully, Users will receive a "Successfully Submitted" screen. WSAC staff will receive confirmation of the URR submission.

Contact the WSAC Unit Record Report team at unitrecord@wsac.wa.gov if you identify any additional changes necessary to the data after submission.

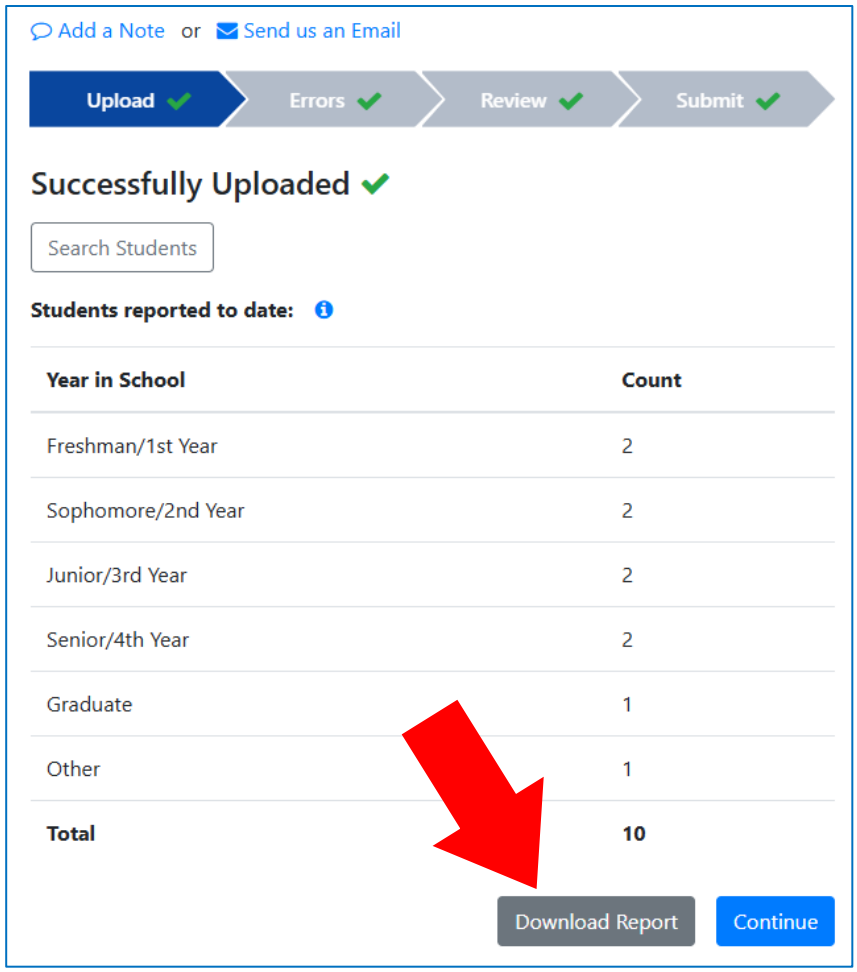


Download of "Point-In-Time" URR Data File

At the time of submittal, WSAC recommends that the institution download a copy of the final "Point-In-Time" URR data file for retention in institutional records. The download is a mirror of the URR data as it exists on file at WSAC at the "point-in-time" the download file is generated. It includes all added records, error corrections and edits, but does not include override comments entered. Keeping a copy of the final, edited file at submission for history is recommended.

Ability to download Point-In-Time file(s) of the URR is not new. The Download button is located on the Upload screen (files downloaded from the Search screen are not full URR data files). The download may be helpful to pull data to create an abbreviated supplemental file to effect "bulk" deletion or editing of multiple records, or if the institution is considering a total deletion of the original file upload but wants to retain all edits made in the file to date before discarding the original file.

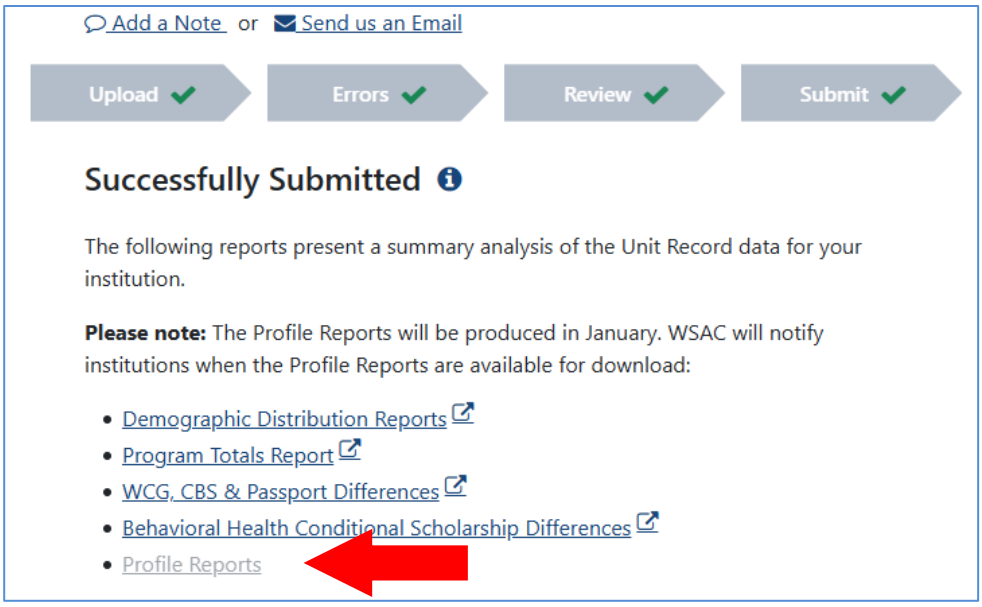
The "Point-In-Time" URR data file may be downloaded at time of Submit, or during active editing of the URR prior to final submit, by navigating to the Upload screen and clicking on the "Download Report" button at the bottom of the screen.



Reports Available After Submission

From the Submit screen, Users have an opportunity to review and download copies of the "Demographic Report" as well as the "Program Totals Report." These reports are available for download for up to four years until the next reporting cycle is added to the year selection dropdown box and the oldest year is removed. The Demographics, Program Totals, WCG/CBS/PTC Differences and Profile reports for the fifth year are removed at that time as the year is no longer available from the dropdown options.

NOTE: The Profile Reports button is grayed out until those reports are finalized in January. WSAC will announce availability of Profile Reports to institutions when ready for download. Profile Reports remain available on the Portal for download for up to four years.



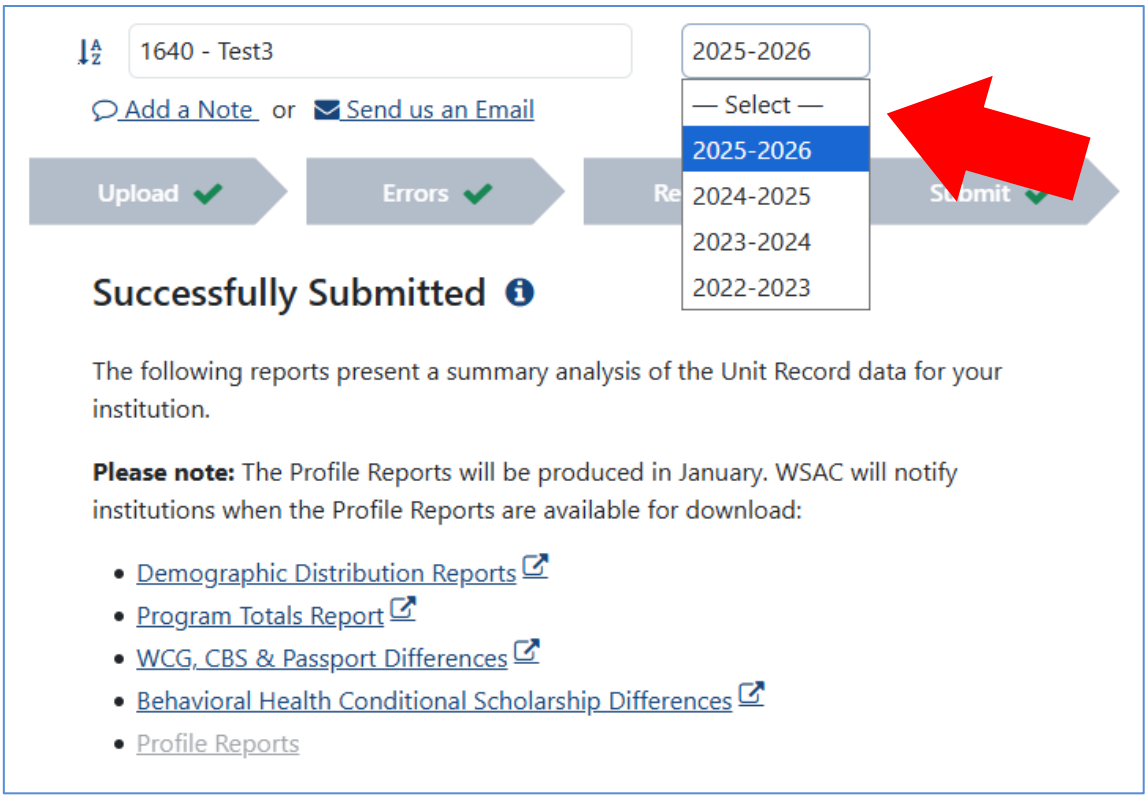
WSAC recommends that Users retain copies of the Point-in-Time full URR file download, Program Totals Report and Demographic Distribution Reports after submitting your final URR. Users may also review previous year Profile Reports at that time.

PLEASE NOTE: After WSAC has finalized and closed all URRs for the year, WSAC will remove any non-essential, non-need-based data for student records that do not contain at least one dollar of need-based aid from your institution's URR records. This means that, prior to final closure of all URR submissions for the year, your preliminary Institutional Totals Report column for 2025-26 may include some non-need-based aid records that WSAC will remove later. Until WSAC removes all non-essential non-need-based aid from the 2025-26 column, your Program Totals Report could reflect a greater percentage change between 2024-25 and 2025-26 than will appear after WSAC releases the final reports for 2025-26 in January 2027.

Updated Profile Reports Available in January/February 2027

Updated Profile Reports that compare 2025-26 institutional data to aggregate same sector institutions and all institutions in the state are expected to be available in January or February 2027. Institutions will receive an email announcement when those reports are available.

Prior to January/February 2027, the Profile Reports are downloadable for the three previous years' comparison data. You may download and print those reports as a PDF at any time by selecting the appropriate academic year report from the dropdown box shown of the URR Submit screen.


1640 - Test3
2025-2026
Add a Note
or
Send us an Email
— Select —
2025-2026
2024-2025
2023-2024
2022-2023
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
Behavioral Health Conditional Scholarship Differences
Profile Reports

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

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

Are aid types need-based or not?	**Need-Based (FAFSA or WASFA data required)**	**Need-Based (FAFSA or WASFA data optional)**	**Non-Need Based Federal Loans**	**Non-Need Based Other Programs**
What recipients should be reported?	**Report all recipients**	**Report all recipients**	**Report all recipients**	**Only report recipients who have need-based aid or admin. by WSAC**
Should FAFSA or WASFA data be submitted?	**Yes**	**Yes, if FAFSA or WASFA data is available**	**Yes, FAFSA data required**	**Yes, if FAFSA or WASFA data is available**
Name of Program or Aid Type				
Federal Pell Grant	X			
Federal SEOG	X			
Federal TEACH Grant		X		
Federal Nursing Scholarships		X		
Federal Work Study	X			
Federal Nursing Health Loans		X		
Federal Direct Subsidized Loans	X			
Federal Direct Unsubsidized Loans			X	
Federal Parent PLUS Loans			X	
Federal Grad PLUS Loans			X	
Washington College Grant	X			
WGA (WA Grant Apprenticeship)	X			
College Bound Scholarship	X			
Passport to College Scholarship	X			
Passport to College Incentive Grant	X			
National Guard Grant		X		
WAVE (Washington Award for Vocational Excellence)				X
Alternative Routes		X		
Paraeducators (Pipeline for)		X		

Appendix A

Are aid types need-based or not?	**Need-Based (FAFSA or WASFA data required)**	**Need-Based (FAFSA or WASFA data optional)**	**Non-Need Based Federal Loans**	**Non-Need Based Other Programs**
What students should be reported?	**Report all recipients**	**Report all recipients**	**Report all recipients**	**Only report recipients who have need-based aid or admin. by WSAC**
Should FAFSA or WASFA data be submitted?	**Yes**	**Yes, if FAFSA or WASFA data is available**	**Yes, FAFSA data required**	**Yes, if FAFSA or WASFA data is available**
Name of Program or Aid Type				
Teacher Shortage Conditional Scholarship		X		
Teacher Grant Programs	X			
Behavioral Health Conditional Scholarship	X			
WSOS BA Scholarship		X		
WSOS Career Tech Scholarship		X		
WSOS Graduate Scholarship		X		
WSOS Promise Scholarship		X		
SBCTC Opportunity Grant		X		
Other State Funded Gift Assistance		X		
On Campus State Work Study	X			
Off Campus State Work Study	X			
WorkForce Training Funds		X		
Need Based Institutional Gift Aid		X		
Non-Need Based Institutional Gift Aid				X
Institutional Employment		X		
Institutional Loans				X
Emergency Aid		X		
Conditional Loans				X
Private Loans				X
Other Loans				X
Outside Scholarships				X
VA Benefit				X
Other Agency Assistance				X

APPENDIX B: RECORD LAYOUT

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

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

Field/Column Header Name	Valid Inputs	Remarks	Changes?
MiddleName	Any characters (up to 50)	Optional, but provide if available – even if only the initial.	No
DateOfBirth	Most standard US database date-only outputs are supported e.g.: • 12/1/1987 • Dec 10 1990 • 12 Aug 1994 • 'April 1, 1992' • '1 May, 1990'	Required field if reporting FAFSA-based or WASFA aid types; otherwise, optional and may remain blank. Standard US dates. Two-digit years accepted, but four-digit years are preferred. If commas are included in the dates, enclose the data in quotes.	No
Gender	'1' or 'Male' '2' or 'Female' '3' or 'Unknown' '4' or 'X/Non-Binary'	Required for all recipients.	No
IsStateResident	'y' or 'true' 'n' or 'false'	Required for all recipients.	No
YearInSchool	'1' or 'Freshman/1st Year' '2' or 'Sophomore/ 2nd Year' '3' or 'Junior/3rd Year' 4' or 'Senior/4th Year' '5' or Unclassified/5th Year' '6' or 'Graduate' '7' or 'Professional' '8' or 'Other'	Required for all recipients. Report the status as of the beginning of the term of the recipient's last financial aid disbursement for the 2024-2025 year.	No
IsOfHispanicOrigin	'y' or 'true' 'n' or 'false' blank if not reported	Report if available. Leave blank only if information is not available. Blanks counted as 'n' or 'false.'	No
IsRaceAmericanIndianAlaskaNative	'y' or 'true' 'n' or 'false' blank if not reported	Report if available. Leave blank only if information is not available. Blanks counted as 'n' or 'false.' May report 'y' or 'true' in one or more race category.	No

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

Appendix B

Field/Column Header Name	Valid Inputs	Remarks	Changes?
CostOfAttendance	Integer 0 to 250000	Required for all need-based aid recipients with a FAFSA or WASFA on file. May be blank if FAFSA or WASFA data not available. Must use full assessed tuition amount in COA calculation for WCG and CBS recipients and, when possible, for other need-based aid recipients	No
StudentAidIndex	Integer -1500 to 999999	Required for all need-based aid recipients with a FAFSA or WASFA on file. Report negative value if SAI is a negative number. Leave blank if FAFSA or WASFA data is not available. Report FM only.	No
NeedDuration	Integer 1 to 12	Number of months. Required for all need-based aid recipients with a FAFSA or WASFA on file. Leave blank if FAFSA or WASFA data not available.	No
NeedAmount	Non-negative Integer 0 to 250000	Required for all need-based aid recipients with a FAFSA or WASFA on file. Negative Need Amount values are invalid and must be adjusted to '0.' Leave blank if FAFSA or WASFA data not available.	No

Enrollment Status and Payments by Term Section

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

Field/Column Header Name	Valid Inputs	Remarks	Changes?
*TERM*EnrollmentStatus	Integer 0, 1–30 3.25, 3.50, 3.75, etc. May also include word "credits" but not required (0 credits, etc.)	Required for all recipients for each of the five terms. Report credits enrolled. Include partial credits such as 0.25; .50; .75. If the institution does not have that term (e.g., winter for semester institutions), or the student is not enrolled, report as 0.	No
*TERM*FederalPellGrant	Non-negative Integer 0 to 11093	Need-based (FAFSA data required). Report all recipients.	No
*TERM*FederalSEOG	Non-negative Integer 0 to 6000	Need-based (FAFSA data required). Report all recipients.	No
*TERM*FederalTEACHGrant	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*FederalNursingScholarships	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*FederalWorkStudy	Non-negative Integer 0 to 99999	Need-based (FAFSA data required). Report all recipients.	No
*TERM*FederalNursingHealthLoans	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*FederalDirectSubsidizedLoans	Non-negative Integer 0 to 23000	Need-based (FAFSA data required). Report all recipients.	No
*TERM*FederalDirectUnsubsidizedLoans	Non-negative Integer 0 to 90000	Non-need based federal loans. Report all recipients.	No
*TERM*FederalParentPLUSLoans	Non-negative Integer 0 to 99999	Non-need based federal loans. Report all recipients.	No

Field/Column Header Name	Valid Inputs	Remarks	Changes?
*TERM*FederalGradPLUSLoans	Non-negative Integer 0 to 99999	Non-need based federal loans. Report all recipients.	No
*TERM*WACollegeGrant	Non-negative Integer 0 to 18431	Need-based (FAFSA or WASFA data required). Report all recipients.	Yes
*TERM*WGA	Non-negative Integer 0 to 4923	Need-based (FAFSA or WASFA data required). Report all recipients	Yes
*TERM*WABridge	Non-negative Integer 0	Zero beginning 2025-26	Yes
*TERM*CollegeBoundScholarship	Non-negative Integer 0 to 19181	Need-based (FAFSA data required). Report all recipients.	Yes
*TERM*PassporttoCollegeScholarship	Non-negative Integer 0 to 3100	Need-based (FAFSA or WASFA data required). Report all recipients.	Yes
*TERM*PassporttoCollegeIncentiveGrant	Non-negative Integer 0 to 5000	Need-based (FAFSA or WASFA data required). Report only those who received incentive grants as direct student aid.	No
*TERM*NationalGuardGrant	Non-negative Integer 0 to 7000	Need based (FAFSA or WASFA data required). Report all recipients.	No
*TERM*WAVE	Non-negative Integer 0 to 11000	Non-need based (FAFSA or WASFA data optional). Report all recipients.	No
*TERM*AlternativeRoutes	Non-negative Integer 0 to 8000	Need based (FAFSA or WASFA data required). Report all recipients.	No
*TERM*Paraeducator	Non-negative Integer 0 to 4000	Need based (FAFSA or WASFA data required). Report all recipients.	No
*TERM*TeacherShortageConditionalScholarship	Non-negative Integer 0 to 8000	Need based (FAFSA or WASFA data required). Report all recipients.	No

Field/Column Header Name	Valid Inputs	Remarks	Changes?
*TERM*TeacherGrantPrograms	Non-negative integer 0 to 8000	Need-based (FAFSA or WASFA data required). Report all recipients	No
*TERM*BehavioralHealthConditionalScholarship	Non-negative integer 0 to 25500	Need-based (FAFSA or WASFA data required).	Yes
*TERM*SubstanceUseDisorderProfessionalGrant	Non-negative integer 0	Zero awards beginning 2025-26	Yes
*TERM*WSOSBAScholarship	Non-negative Integer 0 to 10000	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*WSOSCareerTech	Non-negative Integer 0 to 10000	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*WSOSGradScholarship	Non-negative Integer 0 to 18750	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*WSOSPromiseScholarship	Non-negative Integer 0 to 10000	Need-based (FAFSA data optional). Report all recipients.	Yes
*TERM*SBCTCOpportunityGrant	Non-negative Integer 0 to 10378	Need-based (FAFSA data optional). Report all recipients.	Yes
*TERM*OtherStateFundedGiftAssistance	Non-negative Integer 0 to 99999	Need-based (FAFSA or WASFA data optional). Report all recipients.	No
*TERM*OnCampusStateWorkStudy	Non-negative Integer 0 to 99999	Need-based (FAFSA or WASFA data required). Report all recipients.	No
*TERM*OffCampusStateWorkStudy	Non-negative Integer 0 to 99999	Need-based (FAFSA or WASFA data required). Report all recipients	No
*TERM*WorkForceTrainingFunds	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*NeedBasedInstitutionalGiftAid	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No
*TERM*NonNeedBasedInstitutionalGiftAid	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
*TERM*InstitutionalEmployment	Non-negative Integer 0 to 99999	Need-based (FAFSA data optional). Report all recipients.	No

Field/Column Header Name	Valid Inputs	Remarks	Changes?
*TERM*InstitutionalLoans	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
*TERM*EmergencyAid	Non-negative Integer 0 to 10000	Need-based. Report all recipients.	Yes
*TERM*ConditionalLoans	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
*TERM*PrivateLoans	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
*TERM*OtherLoans	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
*TERM*OutsideScholarships	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No
*TERM*VABenefit	Non-negative Integer 0 to 99999	Non-need based. Report only Veterans waivers or benefits that reduce COA, for students who also received need-based aid.	No
*TERM*OtherAgencyAssistance	Non-negative Integer 0 to 99999	Non-need based. Only report students who are also need-based recipients.	No

APPENDIX C: SYSTEM EDITS

Errors that prevent File Upload and Import

- File is not in CSV format (or is otherwise unreadable).
- File Header row is missing.
- File Header row is missing some of the column headings:
  - Headings must be spelled correctly without extra punctuation or spaces.
  - Headings can be in any order.
  - Any character casing in the headings will be accepted.
- File Header has 'extra' columns (i.e., columns not in the file specifications).
- SSN duplicated on multiple rows.
- Institution Student ID is not blank and duplicated on multiple rows.
- Data rows do not have the same number of columns as the header row.
- Required fields are missing values:
  - SSN
  - LastName
  - FirstName
  - Gender
  - IsStateResident
  - YearInSchool
  - RejectedISIRWASFA
  - EnrollmentStatus (for all five terms)
  - Financial Aid Received (for all five terms for all programs)
- Numeric columns do not contain valid numbers (numbers in URR are always integers).
- Selection columns (e.g., enrollment status, year in school) do not contain valid selections.
- Boolean (yes/no) columns do not contain valid codes.
- Date fields do not contain valid dates (e.g., '2004-0101' or '12/31/2019'). If commas are included in the dates, enclose the data in quotes.

Appendix C

Detailed Data Edit Errors

Edit	Overrideable
Alternative Routes Amount Differs from Awards On File	X
Alternative Routes Award Not Found In Awards On File	X
Behavioral Health Conditional Scholarship Amount Differs from Awards on File	X
Behavioral Health Conditional Scholarship Award Not Found In Awards On File	X
Behavioral Health Conditional Scholarship Recipient Not a State Resident	
College Bound Scholarship Award Differs From CSAW	X
College Bound Scholarship Award Not Found In CSAW	X
College Bound Scholarship Recipient Not A State Resident	
Cost of Attendance Does Not Match FAFSA or WASFA	X
Cost Of Attendance Is Required For FAFSA-Based and WASFA Aid Types	
Cost Of Attendance Minus SAI Does Not Equal Need	X
Cost of Attendance, Need Amount, Student Aid Index, And Need Duration Must All Be Present Or All Blank	
Cost Of Attendance Outside Expected Range	X
Date Of Birth Is Required For FAFSA-Based and WASFA Aid Types	
Date Of Birth Outside Expected Range	informational
Duration Of Need Must Be In The Range Of 1 To 12 Months	X
Fall term Enrollment Status cannot be 0 Credits when Fall term aid has been reported	X
Federal GradPLUS Loan Recipient Must Be Reported As Graduate Student	
Federal ParentPLUS Loan Recipient Cannot Be Reported As Graduate Student	X
Graduate students may only be reported by select institution types	X
ISIRWASFA Transaction Number doesn't match the transaction number reported in CSAW	X
National Guard Grant Amount Differs from Awards On File	X
National Guard Grant Award Not Found In Awards On File	X
Need Amount Cannot Exceed Cost Of Attendance	X
Need Amount Is Required For FAFSA-Based and WASFA Aid Types	
Need Amount Reported For Need Based Aid Recipient Is Outside Expected Range	
Need Duration Is Required For FAFSA-Based and WASFA Aid Types	
Passport To College Scholarship Award Differs from WSAC Records	X
Passport To College Scholarship Award Not Found in WSAC Records	X
Passport To College Scholarship Recipient Not a State Resident	
Paraeducator Amount Differs From Awards On File	X
Paraeducator Award Not Found In Awards On File	X
Spring Term Enrollment Status Cannot Be 0 Credits When Spring Term Aid Has Been Reported	X
SSN Does Not Appear To Be a Valid Number	X
State Work Study No Valid Institutional SWS Allocation in Portal	
State Work Study Not A State Resident	

Appendix C

Edit	Overrideable
Student Aid Index Does Not Match FAFSA or WASFA	X
Student Aid Index Is Required For FAFSA-Based and WASFA Aid Types	
Student Aid Index Outside Expected Range	informational
Student ISIR or WASFA Transaction Number Not Reported	X
Student Not Enrolled	X
Student Passport Incentive Not Found in Awards File	X
Substance Use Disorder Professional Grant Differs From Awards On File	X
Substance Use Disorder Professional Grant Award Not Found In Awards On File	X
Summer 1 term Enrollment Status cannot be 0 Credits when Summer 1 term aid has been reported	X
Summer 2 term Enrollment Status cannot be 0 Credits when Summer 2 term aid has been reported	X
Teacher Grant Programs Award Differs from WSAC Records	X
Teacher Grant Programs Award Not Found In WSAC Records	X
Teacher Shortage Conditional Scholarship Amount Differs From Awards On File	X
Teacher Shortage Conditional Scholarship Award Not Found In Awards On File	X
Total Aid exceeds Cost of Attendance	X
Total Aid Reported Is Zero	X
Total Alternative Routes Outside Expected Range	X
Total Behavioral Health Conditional Scholarship Outside Expected Range	X
Total College Bound Scholarship Outside Expected Range	X
Total Conditional Loans Outside Expected Range	X
Total Emergency Aid Outside Expected Range	X
Total Federal Direct Subsidized Loans Outside Expected Range	X
Total Federal Direct Unsubsidized Loans Outside Expected Range	X
Total Federal GradPLUS Loans Outside Expected Range	X
Total Federal Nursing Health Loans Outside Expected Range	X
Total Federal Nursing Scholarships Outside Expected Range	X
Total Federal ParentPLUS Loans Outside Expected Range	X
Total Federal PELL Grant Outside Expected Range	X
Total Federal SEOG Outside Expected Range	X
Total Federal TEACH Grant Outside Expected Range	X
Total Federal Work Study Outside Expected Range	X
Total Institutional Employment Outside Expected Range	X
Total Institutional Loans Outside Expected Range	X
Total National Guard Grant Outside Expected Range	X
Total Awarded Financial Aid Exceeds the Reported Need Amount	X
Total Need-Based Institutional Gift Aid Outside Expected Range	X
Total Non-Need Based Institutional Gift Aid Outside Expected Range	X
Total Other Agency Assistance Outside Expected Range	X

Appendix C

Edit	Overrideable
Total Other Loans Outside Expected Range	X
Total Other State Funded Gift Assistance Outside Expected Range	X
Total Outside Scholarships Outside Expected Range	X
Total Paraeducator Outside Expected Range	X
Total Passport To College Scholarship Outside Expected Range	X
Total Passport To College Incentive Grant Outside Expected Range	X
Total Private Loans Outside Expected Range	X
Total reported WGA amount Differs from Awards on File	
Total State Work Study Outside Expected Range	X
Total Teacher Grant Programs Outside Expected Range	X
Total Teacher Shortage Conditional Scholarship Outside Expected Range	X
Total SBCTC Opportunity Grant Outside Expected Range	X
Total Washington College Grant Outside Expected Range	X
Total WA Bridge Outside Expected Range	X
Total WAVE Outside Expected Range	X
Total WGA is outside the expected range	X
Total WorkForce Training Funds Outside Expected Range	X
Total WSOS BA Scholarship Outside Expected Range	X
Total WSOS Career Tech Scholarship Outside Expected Range	X
Total WSOS Promise Scholarship Outside of Expected Range	X
Total WSOS Graduate Scholarship Outside Expected Range	X
Washington College Grant Award Differs from CSAW	X
Washington College Grant Award Not Found In CSAW	X
Washington College Grant Recipient Not A State Resident	
WAVE Amount Differs from Awards On File	X
WAVE Award Not Found in Awards On File	X
WA Bridge Amount Differs from CSAW	X
WA Bridge Award Not Found In CSAW	X
WA Bridge Recipient Not A State Resident	
WGA Award Not Found in Awards on File	X
WGA Recipient is Not A State Resident	
Winter term Enrollment Status cannot be 0 Credits when Winter term aid has been reported	X
WSOS BA Scholarship Recipient Not a State Resident	
WSOS Career Tech Recipient Not a State Resident	
WSOS Graduate Scholarship Recipient Not a State Resident	
WSOS Promise Scholarship Recipient Not a State Resident	

APPENDIX D: QUICK LOOK-UP BY FINANCIAL AID PROGRAM

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

Financial Aid Program	Unit Record Report Field Name
Federal Unsubsidized Stafford Loans	FederalDirectUnsubsidizedLoans
Federal Work Study	FederalWorkStudy
Federal TEACH Grant	FederalTEACHGrant
GET Prepaid Tuition amounts	NOT TO BE REPORTED IN URR
Global Opportunity Grant (UW only)	OtherStateFundedGiftAssistance
Gold Star Book Stipend	OtherStateFundedGiftAssistance
Governors' Scholarship (from CSF)	OutsideScholarships
Grad PLUS Loans	FederalGradPLUSLoans
Graduate Tuition Waivers	NeedBasedInstitutionalGiftAid or NonNeedBasedInstitutionalGiftAid
Health professions student loan funds	FederalNursingHealthLoans
Institutional aid fund (public institutions only)	NeedBasedInstitutionalGiftAid or NonNeedBasedInstitutionalGiftAid
Institutional aid fund disbursed as work	InstitutionalEmployment
Institutional emergency aid	EmergencyAid
Institutional emergency loan	EmergencyAid
Institutional grants and scholarships	NeedBasedInstitutionalGiftAid or NonNeedBasedInstitutionalGiftAid
Institutional loans	InstitutionalLoans
Leadership 1000 Scholarship (from CSF)	OutsideScholarships
L&I assistance	OtherAgencyAssistance
National Guard Grant	NationalGuardGrant
National Merit Scholarships	OutsideScholarships
Need-based institutional gift aid	NeedBasedInstitutionalGiftAid
Need-based tuition & fee waiver	NeedBasedInstitutionalGiftAid
Non-need-based institutional gift aid	NonNeedBasedInstitutionalGiftAid
Non-need-based tuition & fee waiver	NonNeedBasedInstitutionalGiftAid
Non-work study institutional & off-campus employment	InstitutionalEmployment
Nonresident enrollment incentive waiver	NeedBasedInstitutionalGiftAid or NonNeedBasedInstitutionalGiftAid
Off-Campus State Work Study	OffCampusStateWorkStudy
On-Campus State Work Study	OnCampusStateWorkStudy
Opportunity Grant (from SBCTC)	SBCTCOpportunityGrant
Opportunity Scholarship (from WSOS)	WSOSBAScholarship
Organizational scholarships	OutsideScholarships
Other agency assistance	OtherAgencyAssistance
Other conditional loans not reported elsewhere	ConditionalLoans
Other loans not reported elsewhere	OtherLoans
Other state scholarships (i.e., Oregon)	OutsideScholarships
Other state-funded gift assistance	OtherStateFundedGiftAssistance
Outside scholarships	OutsideScholarships
Paraeducator	Paraeducator
Passport to College Scholarship	PassporttoCollegeScholarship

Financial Aid Program	Unit Record Report Field Name
Passport to College Incentive Grant	PassporttoCollegeIncentiveGrant
Parent PLUS Loans	FederalParentPLUSLoan
Pell Grant	FederalPellGrant
Pipeline for Paraeducators Conditional Scholarship	Paraeducator
PLUS Loans	FederalGradPLUSLoan or FederalParentPLUSLoan
PREP loans	PrivateLoans
Private loans	PrivateLoans
Private scholarships	OutsideScholarships
Promise Scholarship	WSOSPromiseScholarship
Robert C. Byrd Honors Scholarship	OutsideScholarships
ROTC Scholarships	OtherAgencyAssistance
Rural Jobs Initiative (RJI)	WSOSCareerTech
SBCTC Opportunity Grant	SBCTCOpportunityGrant
SEOG	FederalSEOG
Service club scholarships	OutsideScholarships
Services for the Blind assistance	OtherAgencyAssistance
SEAG	OtherStateFundedGiftAssistance
SNG	WACollegeGrant
Society of Professional Engineers in Aerospace (SPEEA) Tuition Assistance Grant	OtherAgencyAssistance
SPEEA Tuition Assistance Grant	OtherAgencyAssistance
SSEH Pilot	OtherStateFundedGiftAssistance
Stafford Loans (subsidized)	FederalDirectSubsidizedLoans
Stafford Loans (unsubsidized)	FederalDirectUnsubsidizedLoans
State Need Grant	WACollegeGrant
State Work Study	OnCampusStateWorkStudy or OffCampusStateWorkStudy
State Work Study off-campus	OffCampusStateWorkStudy
State Work Study on-campus	OnCampusStateWorkStudy
Student Emergency Assistance Grant (SEAG)	OtherStateFundedGiftAssistance
Subsidized Stafford Loans	FederalDirectSubsidizedLoans
Substance Use Disorder Professional Grant	SubstanceUseDisorderProfessionalGrant
SUDP or SUDPG	SubstanceUseDisorderProfessionalGrant
Supplemental Educational Opportunity Grant	FederalSEOG
SWS (off-campus)	OffCampusStateWorkStudy
SWS (on-campus)	OnCampusStateWorkStudy
Support Students Experiencing Homelessness (SSEH) Pilot	OtherStateFundedGiftAssistance
TEACH Grant	FederalTEACHGrant

Financial Aid Program	Unit Record Report Field Name
Teacher Grant Programs	TeacherGrantPrograms
Teacher Shortage Conditional Scholarship	TeacherShortageConditionalScholarship
Tuition & fee waiver (need-based)	NeedBasedInstitutionalGiftAid
Tuition & fee waiver (non-need based)	NonNeedBasedInstitutionalGiftAid
Unsubsidized Stafford Loan	FederalDirectUnsubsidizedLoans
Veterans' benefits	VABenefit
Vocational Rehabilitation assistance	OtherAgencyAssistance
Washington Award for Vocational Excellence (WAVE)	WAVE
Washington College Bound Scholarship	CollegeBoundScholarship
Washington College Grant	WACollegeGrant
Washington College Grant Apprenticeship	WGA
Washington Bridge Grant	WABridge
Washington Scholars	OtherStateFundedGiftAssistance
Washington State Achievers Scholarship	OutsideScholarships
Washington State Opportunity Scholarship BA Scholarship (Washington STEM/WSOS)	WSOSBAScholarship
Washington State Opportunity Scholarship Career and Technical Scholarship (WSOS)	WSOSCareerTech
Washington State Opportunity Scholarship Graduate Scholarship (WSOS)	WSOSGradScholarship
Washington State Opportunity Scholarship Rural Jobs Initiative (RJI) (WSOS)	WSOSCareerTech
WA Grant Apprenticeship	WGA
Washington State Need Grant	WACollegeGrant
Washington Teacher Grant Programs	TeacherGrantPrograms
WAVE	WAVE
WCG	WACollegeGrant
WCG Apprenticeship	WGA
WA Bridge	WABridge
WA Grant	WACollegeGrant
Western Undergraduate Exchange Waiver (WUE)	NeedBasedInstitutionalGiftAid or NonNeedBasedInstitutionalGiftAid
WGA	WGA
Work-based Learning Tuition Assistance Funds	WorkForceTrainingFunds
Worker Retraining	WorkForceTrainingFunds
WorkFirst Work Study	InstitutionalEmployment
Workforce Investment Act assistance	OtherAgencyAssistance
Workforce Training Program	WorkForceTrainingFunds
WSOS BA Scholarship	WSOSBAScholarship
WSOS Career and Technical Scholarship	WSOSCareerTech
WSOS Graduate Scholarship	WSOSGradScholarship
WSOS Promise Scholarship	WSOSPromiseScholarship
WSOS Rural Jobs Initiative (RJI)	WSOSCareerTech

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

Unit Record Report Field Name	Financial Aid Programs
AlternativeRoutes	Alternative Routes to Teaching Certification
BehavioralHealthConditionalScholarship	Behavioral Health Conditional Scholarship
	BHCS
CollegeBoundScholarship	CBS
	College Bound Scholarship
	Washington College Bound Scholarship
ConditionalLoans	Other conditional loans not reported elsewhere
EmergencyAid	Emergency Aid
	Emergency Loan
	Institutional Emergency Aid
	Institutional Emergency Loan
FederalGradPLUSLoans	Federal Grad PLUS Loans
	Grad PLUS Loans
	PLUS Loans
FederalNursingHealthLoans	Federal Nursing Student Loan
	Health professions student loan funds
FederalNursingScholarships	Federal nursing and other health professional training scholarships and grants
FederalParentPLUSLoans	Federal Parent PLUS Loans
	Parent PLUS Loans
	PLUS Loans
FederalPellGrant	Federal Pell Grant
	Pell Grant
FederalSEOG	Federal SEOG
	Federal Supplemental Educational Opportunity Grant
	SEOG
	Supplemental Educational Opportunity Grant
FederalDirectSubsidizedLoans	Federal Subsidized Stafford Loans
	Federal Direct Subsidized Loans
	Stafford Loans (subsidized)
	Subsidized Stafford Loans
FederalDirectUnsubsidizedLoans	Federal Unsubsidized Stafford Loans
	Federal Direct Unsubsidized Loans
	Stafford loans (unsubsidized)
	Unsubsidized Stafford loans
FederalTEACHGrant	Federal TEACH Grant
	TEACH Grant
FederalWorkStudy	Federal Work Study

Appendix E

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

Appendix E

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

Appendix E

Unit Record Report Field Name	Financial Aid Programs
PrivateLoans	Private Loans
	PREP Loans
SBCTCOpportunityGrant	Opportunity Grant (from SBCTC)
	SBCTC Opportunity Grant
SubstanceUseDisorderProfessionalGrant	Substance Use Disorder Professional Grant
	SUDP or SUDPG
TeacherGrantPrograms	Student Teaching Grant
	Teacher Grant Programs
TeacherShortageConditionalScholarship	Teacher Shortage Conditional Scholarship
	TSCS
VABenefit	VA Benefits
	Veteran's Benefits
	Veteran's Waivers
WACollegeGrant	SNG
	State Need Grant
	WCG
	Washington College Grant
	WA Grant
	Washington State Need Grant
WAVE	Washington Award for Vocational Excellence
	WAVE
WGA	WA College Grant Apprenticeship
	WA Grant Apprenticeship
	WGA
WABridge	Washington Bridge Grant
	WA Bridge
WSOSBAScholarship	College Success Foundation Opportunity Scholarship
	Opportunity Scholarship
	Washington State Opportunity Scholarship
	Washington State Opportunity Scholarship BA Scholarship
	WSOS BA Scholarship
WSOSCareerTech	Washington State Opportunity Scholarship Career and Technical Scholarship
	WSOS Career and Technical Scholarship
	Washington State Opportunity Scholarship Rural Jobs Initiative (RJI)
	WSOS Rural Jobs Initiative (RJI)
WSOSGradScholarship	Washington State Opportunity Scholarship Graduate Scholarship
	WSOS Graduate Scholarship

Appendix E

Unit Record Report Field Name	Financial Aid Programs
WSOSPromiseScholarship	Promise Scholarship
	Washington State Opportunity Scholarship Promise Scholarship
	WSOS Promise Scholarship
WorkForceTrainingFunds	Basic Food Employment & Training (BFE&T)
	Work-based learning tuition assistance funds
	Worker Retraining
	WorkForce Training Program