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

**Ann Voyles,** Program Associate, WSAC

**Neesha Griffiths,** Receivables Coordinator, WSAC

# Purpose of the Unit Record Report

- Provide institutional reports and profiles

- Assess the needs of students

- Guide legislative and other policy decisions

- Inform changes to state aid programs

- Minimize ad hoc data requests to institutions

# Timeline

- **URR Manual available electronically**:
   https://www.wsac.wa.gov/unit-record

- **July/August 2025**: URR Training; PortalTraining website available for file testing and practice of URR features

- **August 11**: Unit Record Report (URR) application opens

- **October 20: Finalized report due**

- **October/December**: WSAC analysis

- **December**: Reports to policy makers

- **January 2026**: Institutional profiles available

# Manual Overview

- **Introduction**
  - Overview, purpose, changes, and timeline

- **Chapter 1 – General Instructions**

- **Chapter 2 – Data Definitions**

- **Chapter 3 – Reporting Application User's Guide**

- **Appendices**

- **Appendices**

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

  B – Record Layout – File Format and Valid Inputs

  C – System Edits that Prevent File Upload and Import

  D – Quick Lookup by Financial Aid Program

  E – Quick Lookup by Unit Record Report Field Name

# Portal CSV File Submission

- **Building a CSV file for submission**

  - Report files in updated CSV layout format with a header row.

  - Report only students who received financial aid based on the 2024-25 FAFSA or WASFA year.

  - Review the field definitions in Chapter 2 of the Manual and the record layout in Appendices B and C to determine valid field content.

# Reporting Requirements

- **Determine which students to report**

  - Need-Based Recipients – 2024-25 FAFSA or WASFA required.

  - Need-Based Aid Recipients – other programs where FAFSA or WASFA data may or may not be available.

  - Non-Need Based Federal Loan Recipients (i.e., Federal Direct Unsubsidized Loans, Federal Parent PLUS Loans, and Federal Grad PLUS Loans).

  *Appendix A in the Manual details these categories*

# Reporting Requirements, continued:

- **Need-Based Recipients**

  - Intent is to capture all financial aid disbursements in a Unit Record Report.

  - Report this year all financial aid received based on filing of the 2024-25 FAFSA or WASFA.

  - Report on next year's URR all financial aid received based on the 2025-26 FAFSA or WASFA.

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

  ❑ Federal Pell Grant

  ❑ Federal SEOG

  ❑ Federal Work Study

  ❑ Federal Direct Subsidized Loan

  ❑ Washington College Grant *

  ❑ College Bound Scholarship *

  ❑ WA Bridge Grant *

  ❑ Passport to College Scholarship *

  ❑ State Work Study (On- and Off-Campus) **

  ❑ National Guard Grant *

  ❑ Alternative Routes to Teaching *

  ❑ Pipeline for Paraeducators *

  ❑ Teacher Shortage Conditional Grant *

  ❑ Student Teaching Grant *

  ❑ Need-Based Institutional Gift Aid

  * **FAFSA or WASFA required**

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

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

  - Federal TEACH Grant

  - Federal Health Professional Scholarships & Grants

  - Federal Health Professional Loans

  - WSOS BA Scholarship (former Opportunity Scholarship)

  - WSOS Career Tech Scholarship

  - WSOS Graduate Scholarship

  - Other State Funded Assistance

  - Worker Retraining Program Funds

  - Need-Based Institutional Gift Aid

  - Institutional Employment (if need based)

- **Federal Non-Need Based Loan Recipients**

  - Federal Direct Unsubsidized Loan

  - Federal Parent PLUS Loan

  - Federal Grad PLUS Loan

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

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

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

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

- Should be reported as WorkForceTrainingFunds

- **StudentAidIndex replaces ExpectedFamilyContribution**

  - Report negative SAI as a negative integer, and positive SAI as a positive integer

  - Negative SAI effectively is treated as a '0' in the Need equation

  - Subtraction of SAI from COA in the Need formula must not result in a negative Need Amount. Negative Need Amounts are invalid and must be adjusted to show '0' Need.

- **Data no longer collected – Deleted Field Headers**
  - MaritalStatus
  - IsDependent
  - FamilySize
  - NumberInCollege
  - FamilyIncome

- **Error codes associated with deleted field headers have been removed** (see Error Code Revisions, page iv, in 2024-25 Unit Record Report Manual)

- **EnrollmentStatus**

  - Report using enrollment intensity credits (i.e., 0, 1 or 1.00, 2 or 2.00, 3 or 3.00, 3.25, 3.50, 3.75, etc.)

  - Invalid input examples: Not enrolled, Full time, Half time, ¾ time, < Half time.

- **New WSAC programs added to 2024-25 header lay-out**

  - BehavioralHealthConditionalScholarship – awards begin 2025-26

  - SubstanceUseDisorderProfessionalGrant – reportable 2024-25

- **Other Error code revisions**

  - Error codes that formerly referenced Expected Family Contribution (EFC) now reference Student Aid Index (SAI)

  - 'Total Awarded Financial Aid exceeds the reported Need Amount' error replaces 'Total Need-Based Aid exceeds the reported Need Amount.' [Cost minus SAI minus OFA* exceeds Need Amount]

- **Restore deleted URR student records** – see URR Manual, pages 56-58

- **Refer to Pages iii, iv, and v in the Manual for additional details**

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

- **.CSV file requires header row (revised sample available)**

- **For all financial aid recipients reported**
  - Required fields:

    - SSN
    - First Name
    - Last Name
    - Gender
    - Is State Resident

    - Year In School
    - ISIR/WASFA Transaction #
    - Rejected ISIR WASFA
    - **Enrollment Status for each of all five terms**
    - **Financial Aid for each of all five terms – even if '0'**

  - Report non-need-based aid received for all need-based recipients

- **Financial aid reported for each of five terms - based on 2024-25 FAFSA or WASFA:**
  - Summer-1 (primarily leader/header schools; report Summer-2 as '0')
  - Fall
  - Winter (semester schools to report as zeros '0')
  - Spring
  - Summer-2 (primarily trailer schools; report Summer-1 as '0')
  - Clock hour schools may report aid for both summer terms (all 5 terms)
  - If recipient enrolled more than one "term" in same summer – report total amount received and enrollment status as one enrollment term.
  - Review Chapter 2 of Manual for detailed information.

# FAFSA & WASFA Related Fields

- **Fields to also report for 2024-25 FAFSA & WASFA filers**

  - ISIR/WASFA Transaction #

  - Rejected ISIR/WASFA

  - Need Duration

  - Cost of Attendance (COA)

  - Student Aid Index (SAI)

  - Need Amount

# SPECIAL NOTES
# ABOUT SELECTED FIELDS

# Social Security Numbers

- No duplicates. Files with duplicate SSNs will not upload.

- Invalid SSN sequences are flagged. Don't use "dummy" numbers.

- Student SSNs are matched to CSAW and other Portal records for all WSAC state aid programs.

- Discrepancies will appear in the error/differences reports.

- Guidance to resolve SSN issues described in Chapter 3 of the URR manual.

# Year in School

| | |
|---|---|
| '1' or 'Freshman/1st Year' | Required for all recipients. Report the status as of the beginning of the term of the recipient's last financial aid disbursement for the 2024-25 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' | |

# Year in School – Other Considerations

- Do not automatically use the Year in School reported on FAFSA or WASFA.

- Report the highest Year in School for which the student attended when the student's financial aid was disbursed.

- Code '8' or 'Other' – Use to report need-based aid for Running Start students or other students who have not yet graduated from high school.

# Student Aid Index (SAI) *

- **Report the Student Aid Index (SAI)**

  - Use SAI from the Federal Methodology (FM) calculation produced by U.S. Department of Education based on the 2024-25 FAFSA, or WASFA.

    - Report FM SAI if Institutional Methodology (IM) produces different SAI

  - FM SAI is not prorated for Need Duration of less than or greater than nine months, per federal regulations.

  - May be adjusted by professional judgment decisions using IM for the awarding of state aid only; report IM calculation in Override comment.

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

# Cost of Attendance

- Most campuses use several student budgets to reflect changes in living expenses.

- Report the student budget amount related to the Need Amount.

- Should be based on the number of months reported in Need Duration.

# Need Amount

**Cost of Attendance**
**- <u>Student Aid Index (SAI)</u>**
**= Need Amount**

- Based on months reported in Need Duration (ND); SAI not prorated for Need Duration.

- For Need Amount, report the amount used in the disbursement of aid.

- Report Need Amount as '0' or higher (do not report negative Need values).

- Report negative SAI as a negative integer; however, negative SAI is treated as '0' in Need calculation.

- Overawards are flagged when COA – SAI – OFA * exceeds the Need Amount
    * Other Financial Assistance (OFA)

# Need Duration

- Report Need Duration based on the number of months for which the Need Amount and Cost of Attendance were reported.

- Normally report as integers from 1 - 12.

# Term Enrollment Status

| Undergraduate Enrollment Status | Credits | Scheduled Clock Hours | URR Codes |
|---|---|---|---|
| Not Enrolled | n/a | n/a | 0 |
| Full-Time | 12.0 or more | 300 or more * | 12 to 30 |
| Three-Quarter Time | 9.0 – 11.9 | 225 – 299 | 9 to 11.75 |
| Half-Time | 6.0 – 8.9 | 150 – 224 | 6 to 8.75 |
| Less Than Half-Time | 3.0 – 5.9 | 75 – 149 | 1 to 5.75 |

* Typically, clock hour term awards are for full time enrollment status, except that the final term may be paid for part-time enrollment status – unless a student is out of QER

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

- Report the final awards and enrollment levels of student at time of disbursement.

- The Unit Record Reporting tool checks awards against CSAW records.

- Review the "WCG, CBS, & Passport Differences Report" to verify all recipients and awards are correctly reported.

# Reporting of tuition waiver dollars for WCG and CBS recipients

- Required for 2024-25
  - Accurate representation of all forms of assistance that needy students are receiving.

  - Include the full assessed tuition & fee amounts in each student's Cost of Attendance to reflect tuition prior to application of waiver(s).

  - Report waivers as a financial aid resource in the appropriate field:
    - Need-Based Institutional Gift Aid
    - Non-Need Based Institutional Gift Aid

# State Work Study

- Report on-campus & off-campus employment separately.

- Report student's total gross earnings, including employer match or institutional share.

- Include summer employment.

Report either:

- Actual gross earnings based on monthly cut-off dates or institutional payroll dates.

- Average gross term earnings over the academic year for all terms student was enrolled at least half-time.

# Institutional Gift Aid

**Report Institutional Gift Aid as either:**

- Need-Based Institutional Gift Aid – all institutional grants, scholarships, and/or waivers awarded solely or partially on a review of the 2024-25 FAFSA or WASFA.

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

# Other State Funded Gift Assistance

**Report sources of state aid not reported elsewhere.**

Examples include:

- American Indian Endowed Scholarship

- Early Achievers Opportunity Grant

- Global Opportunity Grant (UW only)

- Gold Star Book Stipend

- Student Emergency Assistance Grant (SEAG)

- Supporting Students Experiencing Homelessness (SSEH) Pilot

# EDITS

# Ensuring Data Quality

- Edits help ensure data quality.

- Only two informational edits effective 2024-25 URR:

  - Date of Birth Outside Expected Range

  - Student Aid Index (SAI) Outside Expected Range

- Appendix C lists all edit errors and what action needs to take place.

# Errors that Prevent File Upload

**Refer to Appendix C (page 84) in the Manual**

Examples of errors that prevent upload:

- Header row missing or invalid

- Duplicate SSNs

- Invalid codes

- Blanks reported in required fields

  - RejectedISIRWASFA is a required field

*Be sure to review all 12 items!*

# "Must Fix" (Non-Overrideable) Error Examples

- **Refer to Appendix C (pages 84-87) in the Manual**

  - Non-resident with WCG or other state aid

  - Cost of Attendance is required for FAFSA-based and WASFA Aid Types

  - No Valid Institutional SWS Allocation in Portal

- **Refer to Appendix C (pages 84-87) – Field Content**
  - Need Amount is Zero with Need Based Aid.

    Example: Budget changed with dropped credits

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

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

  - Cost of Attendance minus Student Aid Index (SAI) (calculated by the edit program) does not equal Need Amount reported by college.

# Reminders

- Keep Override comment(s) brief, but with sufficient detail to directly address the error message.

- The ISIR/WASFA transaction number reported should be the **most recent used to award the student,** not necessarily the last one filed. This is used to compare FAFSA/WASFA to URR and CSAW for discrepancies related to Student Aid Index (SAI). Comparisons appear in the On File tab in URR student record.

# Reminders, continued:

- Report the full, non-prorated Student Aid Index, per federal regulations, even if student attended less than full time/full year.

  - WSAC allows professional judgement adjustment of SAI using institutional methodology for the awarding of state aid programs.

    - In these instances, report IM and SAI adjustment details for the state aid award in the Override comment or in Notes where an Override is not available.

    - Must be consistently applied to all students if applied to one student.

- Report all known Race categories for each student, even where Hispanic Origin is marked 'Y' (this eliminates gaps in research data).

# Tips and Best Practices

- Upload your CSV file early – don't wait until the deadline!

- Review WSAC's 2024-25 URR Manual and training materials. Test uploads using the PortalTraining environment:

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

  (Data entered is temporary and clears overnight)

- Use URR informational reports to check for consistency & validity.

- CTCs – Review SBCTC 2024-25 URR Processing Guide(s) when available.

- Contact WSAC with questions or issues not addressed in WSAC's URR Manual.

# USING THE WEB APPLICATION

Washington Student Achievement Council

# Logon to the Portal
https://portal.wsac.wa.gov/

# Portal URR Submission Tool

In the Programs menu, click on Unit Record.

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

- Browse your file directory to select the CSV file for upload

  - **NOTE:** WSAC **auto-creates** and **adds** records to URR for students who have award data in WSAC records but are omitted from the upload file

- Click the blue "Start Upload" button



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

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

Download the template here.

Choose File — Browse

Start Upload — d Manually

# Uploading Data from File

| Upload ✔ | Errors | Review | Submit |

**Successfully Uploaded ✔**

Search Students    Add File    Add Record

**Students reported to date:** ⓘ

| Year in School | Count |
|---|---|
| Freshman/1st Year | 2 |
| Sophomore/2nd Year | 2 |
| Junior/3rd Year | 2 |
| Senior/4th Year | 2 |
| Graduate | 1 |
| Other | 1 |
| **Total** | **10** |

Delete All URR Data    Download Report    Continue

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

| Upload | Errors | Review | Submit |

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

**Row Errors**

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

Download Errors    Try Again

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

# Overview of Error Status Types (Appendix C)

- **"Critical Errors"**

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

- **"Must Fix"**

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

- **"Overrideable"**

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

- **"Informational"**

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

# Main Institutional Error Screen

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

By Status:



or, by Error Type:



Dropdown selection of viewable records per screen

Click highlighted SSN to open record

- Click one of four tabs to navigate within record

- No SSN "click" function while in the student record

- Error list downloadable

- Enter override comments from this screen or main Error screen

- Enter corrections in Details and Terms tabs. Resolved errors disappear from list if corrected before comment.

- Save all work by clicking blue "Save" button before exiting record

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



**Student B (900000002)**     ◀◀ Prev  Next ▶▶     Return to List          Delete  Save

| Details | Terms | On File | Errors (3) |

**Student Information**

| | |
|---|---|
| First name | Student |
| Middle name | Middle name |
| Last name | B |
| SSN or WASFA Id | 900000002 |
| Date of birth | 07/02/2005 |
| Gender | Male |
| Is resident | Yes |

**Ethnicity**

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

**ISIR WASFA & School Information**

| | |
|---|---|
| Transaction number | 1 |
| Rejected | No |
| Student id | Student id |
| Year in school ℹ | Freshman/1st Year |

**Need**

| | |
|---|---|
| Duration (months) | 10 |
| COA ℹ | 30000 |
| SAI ℹ | 0 |
| Need amount ℹ | 30000 |

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

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

  - Click/unclick lock icon to "lock" and "unlock" list view



- Enter changes directly in data field(s)

- ## Student "On File" tab
  - ### Comparison of student URR and WSAC program data
  - ### Green checks show data matches
  - ### Red "X" indicates data mismatch needs addressing

| Details | Terms | On File | Errors (2) |
| --- | --- | --- | --- |

|  | **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 |  | ✔ |

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

- Click error box to be fixed

- Enter Override reason above

- Click Override Errors button

- Click "Save"

- Red "Overrideable" text will become green text

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



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

| | SSN | Student ID | Name | Error (hover over the error to see the full text) | Overrideable |
|---|---|---|---|---|---|
| ☐ | 900000002 | | B, Student | WA College Grant award not found in CSAW | Overridden ℹ |
| ☐ | 900000002 | | B, Student | Student Id Number must be provide | |
| ☐ | 900000002 | | B, Student | WA College Grant amount differs fr | |

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

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



| | SSN | Student ID | Name | Error (hover over the error to see the full text) | Overrideable |
|---|---|---|---|---|---|
| ☐ | 900000003 | | C, Student | College Bound Scholarship award not found in CSAW | Overridden ⌃ |

2:48:34 PM

This is a test override comment.

- Override comments are editable by the original writer **prior** to URR submission and response by WSAC reviewer. New comment required if URR reverted.

- To add comment, select the Error and click "Overrideable," enter, and Save new comment. To Edit, click pencil icon (see previous slide), enter and Save new comment.

- New comments can be edited until URR resubmitted.

- See URR Manual, Chapter 3, page 41-44, for more detail.

# Resolving Social Security Number Differences

**Address any SSN Mismatches.** Incorrect SSNs that originate outside of URR require WSAC assistance to correct (in CSAW, for example).  Click "Send us an Email" and securely notify WSAC to initiate correction.



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

- Apply "Bulk" overrides judiciously. Review records to determine if correction is required rather than applying a Bulk Override comment. From Institution Main Errors screen, select the Error Type from dropdown box. Many errors with similar messaging may require an individualized comment.

- After review, check the boxes next to the student records to apply Override. If all records in that Error Type, click box next to SSN to "select all."

- Enter Override reason

- Click blue Override Errors box

- Overrides applied to all checked records. Click "Save."

- To delete bulk Overrides, check selected records and click gray "Delete Overrides."

Navigate to the "Upload" screen and click "Search Students."

This opens the Search screen, where you can:

- Search for multiple records by adding a comma-separated SSN file (top arrow)

- Search individually ("Search by any field")

- Edit the record and click "Save," or click "Delete" to discard the record.

- Click "Return to List" to return to the Search screen.

- Then click "Go to Report" to exit "Search."

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

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

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

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

- Find and open the student record from the Errors or the Search screen. (Remember: auto-added records cannot be deleted from the URR.)

- Click "Delete," and then click "Confirm Delete" buttons

- The record will be marked as deleted in the institution's main Error menu (Remember: auto-added records cannot be deleted from the URR.)

- Deleted records may be restored – click "Restore" in the student record

- Must use a valid .csv header as top row of file and include complete student record information in each data row.

- Add or delete records or make changes to multiple records simultaneously.

- Mixed types of changes may be included in a single supplemental file.

- If editing existing records, retain full data for the student and edit only fields needing change. File overwrites existing data for affected students.

- Cannot discard successful Supplemental File upload. Must edit records from the Search or Errors screen(s) or upload a compensating supplemental file. Unsuccessful Supplemental File uploads feature a "Try Again" button. Click "Download error file" for the critical error(s) list to identify/fix errors in supplemental file before attempting upload of the corrected file.

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

| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | IsDelete | SSN | InstitutionStudentId | LastName | FirstName | MiddleName |
| 2 | TRUE | 900000014 | | K | Student | |
| 3 | TRUE | 900000015 | | L | Student | |
| 4 | FALSE | 900000017 | | N | Student | |
| 5 | | | | | | |

- Enter "True," "Yes," or "Y" in IsDelete field for record deletions from URR.

- Enter "False," "No," or "N" in IsDelete field to add new records or to install edits to existing records.

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

# Add Notes to URR

- Explanatory notes may be added for WSAC staff to view after submission.

- Click "Add a Note" from any screen.



- Enter text and click "Save Note."

- Notes are editable by the original writer.

- Multiple Notes may be entered by different Users and retained in URR history.

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

- Review the preliminary Program Totals Report to determine if any programs are missing or if unusual patterns appear in Totals comparisons.

- Contact WSAC to discuss if any questions.

- Download PDF for comparison with January 2026 final report.

- If all appears in order, click "Confirm Report."

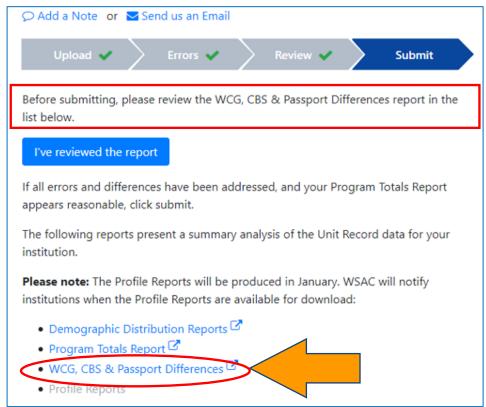- Then click "Continue to Submit" in next screen that appears.

- Before Submit, WCG/CBS/PTC Differences Reports must be reviewed to ensure no unresolved differences remain.

- Each program is a separate report.

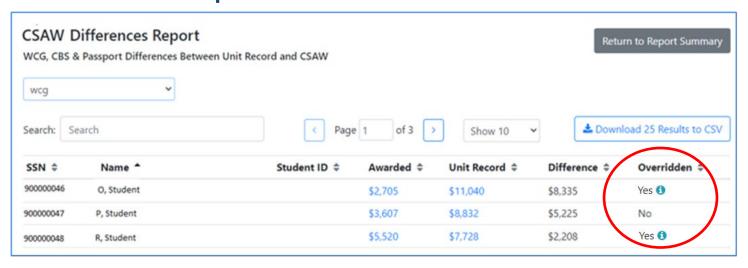- Any differences must be addressed or accounted for.
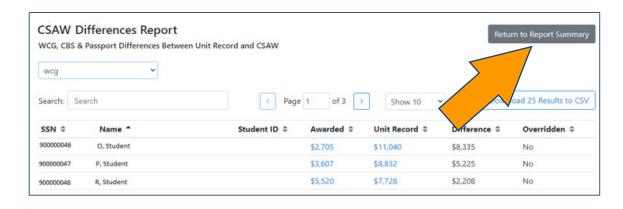
- Example of Differences Report for WCG



- "Yes" in Override column confirms differences already addressed through an Override request and/or funds to be returned to WSAC.

- "No" or blank indicates unaddressed errors, SSN issues, or missing student records.

- If submitted with significant differences, WSAC staff will reach out to resolve questions about the differences before the URR is finalized.

- After addressing Differences Reports reviews for all five programs (WCG, CBS, Passport, Bridge, & SUDP), click "Return to Report Summary" to return to Submit screen. Then, click "I have reviewed the report."
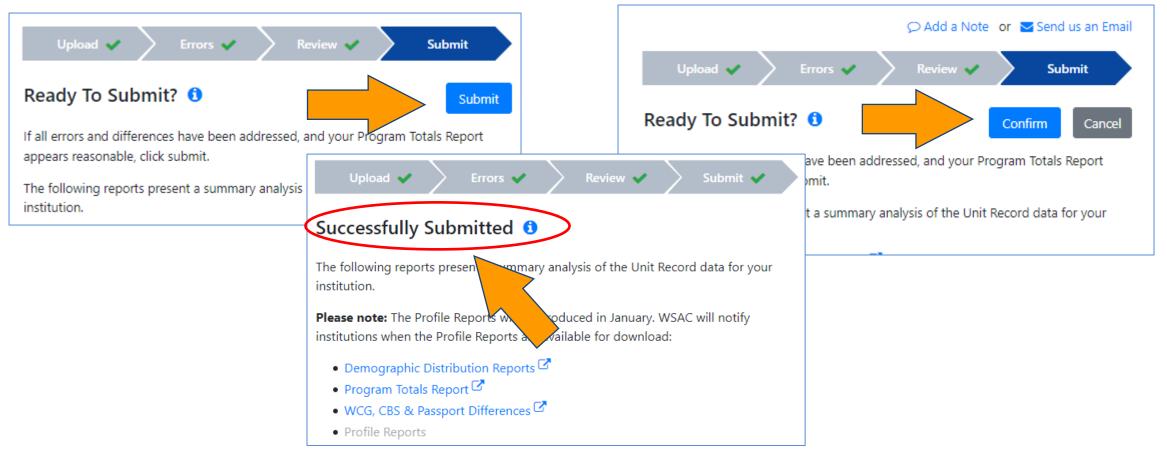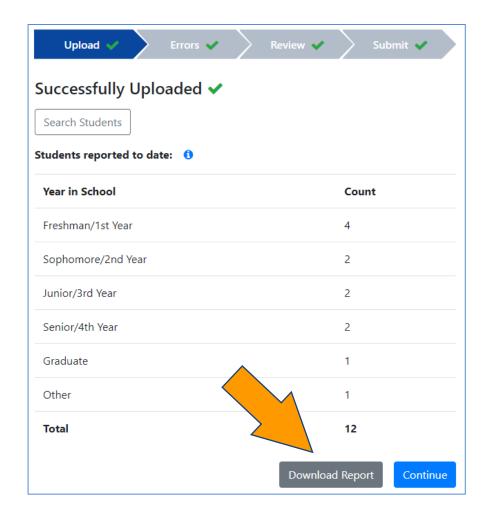
- The "Submit" button will appear. Click "Submit," then "Confirm." Success!

# "Point-in-time" URR Data File Downloads

- Full URR "point-in-time" data file downloads are available on the "Upload" screen.

- Constitutes full URR file in the Portal, with all edits saved through the time of download. (Override comments omitted.)

- Download recommended at time of URR Submit for institutional records.

- May be useful to create data file for supplemental file uploads, retaining all edits to date, history.
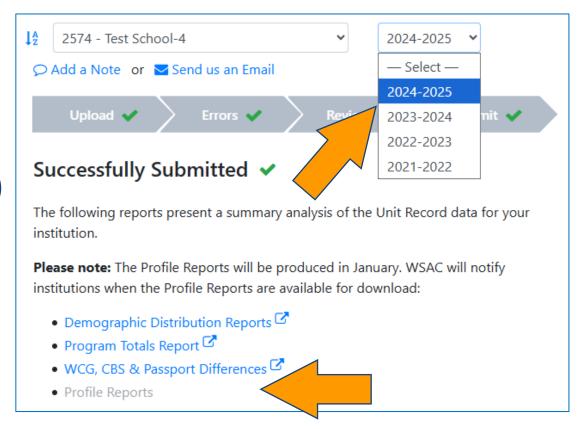
# Reports Available After Submission

- Reports (blue font) available from the Submit screen immediately after submission include:
  - Demographic Distribution Reports
  - Program Totals Report (Preliminary)
  - WCG, CBS & Passport Differences Reports
    (includes Bridge & SUDP Differences Report)

- Profile Reports available January 2026
  - Need-Based Aid Recipients
  - State Work Study Recipients
  - WA College Grant Recipients
  - College Bound Scholarship Recipients

# Questions?

Washington Student Achievement Council

# Where to go for help – WSAC URR Portal Issues

- Review the 2024-25 URR Manual, available online at:

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

- Contact WSAC Unit Record Report team at:

  unitrecord@wsac.wa.gov

| Ann Voyles | Marla Skelley | Neesha Griffiths |
|---|---|---|
| 360-485-1311 | 360-485-1320 | 360-515-3008 |
| annv@wsac.wa.gov | marlas@wsac.wa.gov | neeshag@wsac.wa.gov |