WASHINGTON STUDENT ACHIEVEMENT COUNCIL
EDUCATION · OPPORTUNITY · RESULTS

Unit Record Report 3.0

Submitting the 2022-23 Report and SBCTC ctcLink/PeopleSoft Update

Training Webinar Presentation

August 8, 2023

Presenters

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Purpose of the Unit Record Report

- Provide institutional reports and profiles
- Assess the needs of students
- Guide legislative and other policy decisions
- Inform changes to state aid programs
- Minimize ad hoc data requests to institutions

Timeline

- **URR Manual available electronically:**

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

- **July/August 2023**: URR Training; PortalTraining website available for file testing and practice of URR features
- **August 7**: Unit Record Report (URR) application opens
- **October 9: Finalized report due**
- **October/November**: WSAC analysis
- **December**: Reports to policy makers
- **January 2024**: Institutional profiles available

Manual Overview

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

Manual Overview, continued:

- **Appendices**

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

  B – Record Layout – File Format and Valid Inputs

  C – System Edits that Prevent File Upload and Import

  D – Quick Lookup by Financial Aid Program

  E – Quick Lookup by Unit Record Report Field Name

Portal CSV File Submission

- **Building a CSV file for submission**
  - Report only students who received financial aid based on the 2022-23 FAFSA or WASFA year.
  - Report files in updated CSV layout format with a header row.
  - Review the field definitions in Chapter 2 of the Manual and the record layout in Appendices B and C to determine valid field content.

Reporting Requirements

- **Determine which students to report**
  - Need-Based Recipients – 2022-23 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).

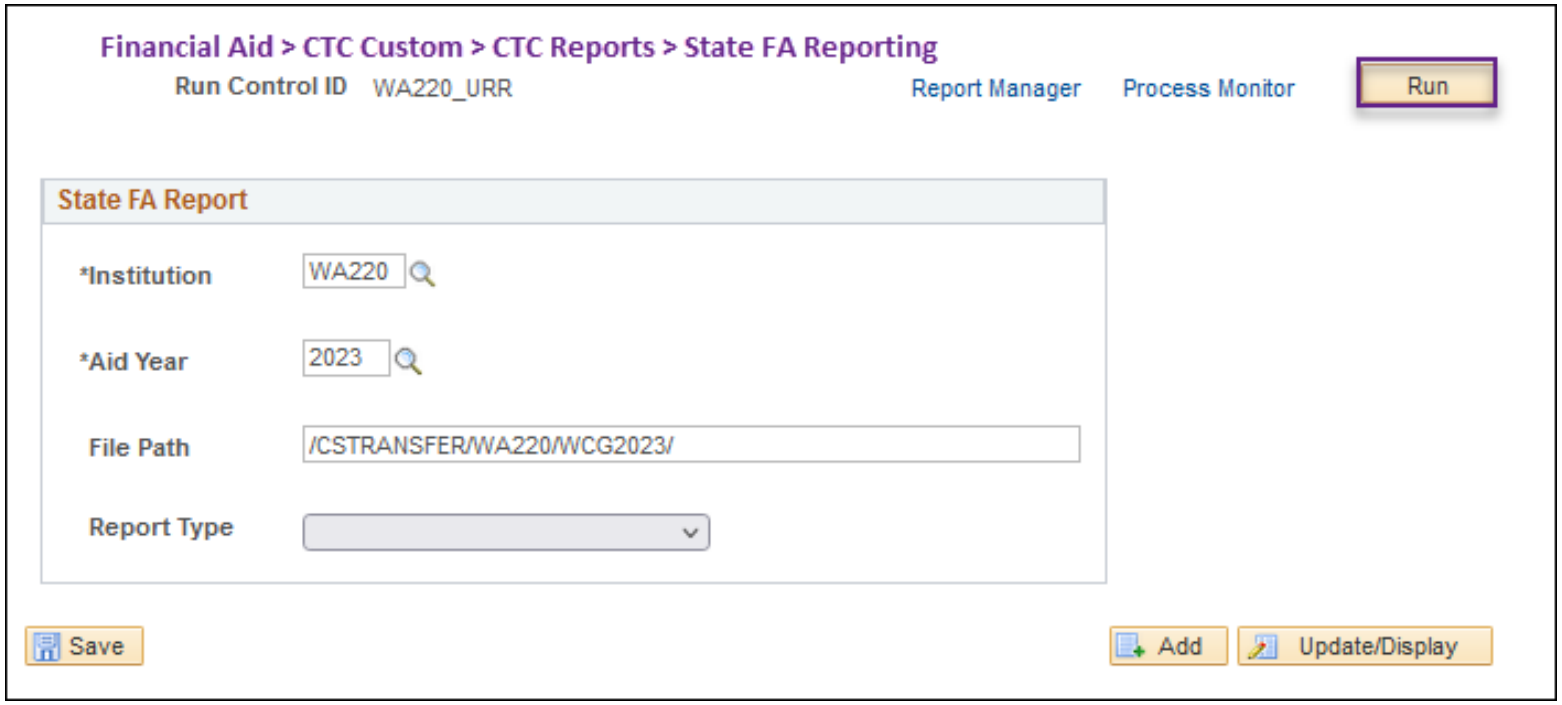
Appendix A in the Manual details these categories

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 2022-23 FAFSA or WASFA.
  - Report on next year's URR all financial aid received based on the 2023-24 FAFSA or WASFA.

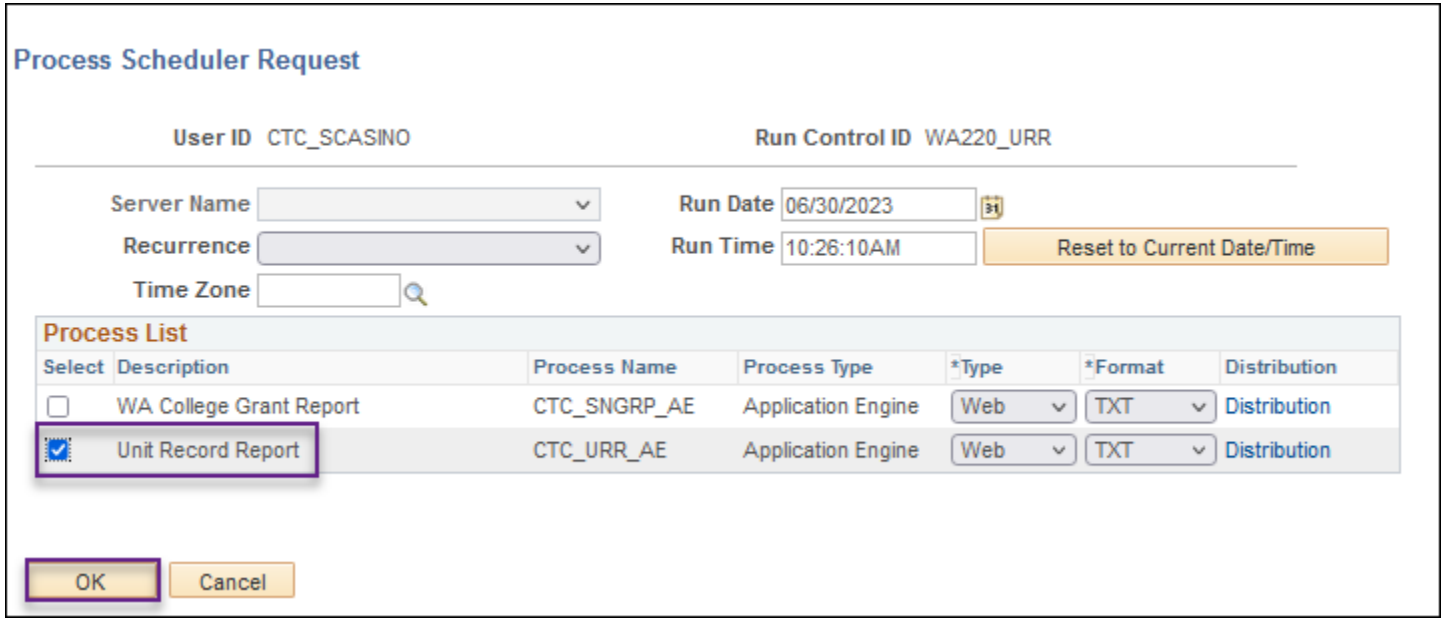
CSV File Creation – ctcLink System

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



CSV File Creation – ctcLink System, continued

- Select 'Unit Record Report'
- Click OK button
- Report file is generated in csv format with header row, which includes who received awards for 2022-23 aid year



Report Selection – ctcLink System

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

Programs to Report, 1 of 3

- **Need-Based Recipients – FAFSA fields required**
  - ❑ Federal Pell Grant
  - ❑ Federal SEOG
  - ❑ Federal Work Study
  - ❑ Federal Direct Subsidized Loan
  - ❑ Washington College Grant*
  - ❑ College Bound Scholarship*
  - ❑ Passport to College Scholarship*
  - ❑ State Work Study (On- and Off-Campus)**
  - ❑ National Guard Grant*
  - ❑ Alternative Routes to Teaching*
  - ❑ Pipeline for Paraeducators*
  - ❑ Teacher Shortage Conditional Grant *
  - ❑ Student Teaching Grant *
  - ❑ Need-Based Institutional Gift Aid

* **FAFSA or WASFA required**

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

Programs to Report, 2 of 3

- **Need-Based Recipients – Other Programs**
  - Federal TEACH Grant
  - Federal Health Professional Scholarships & Grants
  - Federal Health Professional Loans
  - WSOS BA Scholarship (former Opportunity Scholarship)
  - WSOS Career Tech Scholarship
  - WSOS Graduate Scholarship
  - Other State Funded Assistance
  - Worker Retraining Program Funds
  - Need-Based Institutional Gift Aid
  - Institutional Employment (if need based)

Programs to Report, 3 of 3

- **Federal Non-Need Based Loan Recipients**
  - Federal Direct Unsubsidized Loan
  - Federal Parent PLUS Loan
  - Federal Grad PLUS Loan

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

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

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

URR Set-up – ctcLink System

- **Global Setup for the ctcLink Unit Record Report:**
  - Ethnicity Category
  - Award Category:
    - Need-Based FAFSA/WASFA data Required or Optional
    - Non-Need-Based Loans or Other
    - Award Maximum Amounts

URR Configuration – ctcLink System

- **Institution-based Configuration for the ctcLink Unit Record Report:**
  - URR ethnicity category linked to PeopleSoft Ethnic Group values
  - Award category:
    - Linked to FA Item Type and Award Status (example: Offered, Accepted, or Disbursed)

Changes for the 2022-23 Unit Record Report Portal,
1 of 2

- **New Field Additions to .CSV Header File Record Layout**
  - WCG Bridge
  - WAVE
- **Functional improvements**
  - Updates to Overrides - generally

Changes for the 2022-23 Unit Record Report Portal,
2 of 2

- **New Error Codes**
  - **Informational Errors** should be reviewed and corrected if needed – DO NOT BULK OVERRIDE
    - Enrollment does not match Need Duration
    - Total Need-based aid exceeds the reported Need Amount
  - WCG-Bridge recipient not a state resident
- **Refer to Pages iii and iv in the Manual for additional details**

Early Announcement: Changes for the 2023-24 Unit Record Report Portal

- **The Washington College Grant-Connect (WCG-C) and Nurses Conditional Scholarship Programs are expected to be separately reportable fields in 2023-24.**

- **Washington College Grant-Apprenticeship (WCG-A) may become URR reportable in 2024-25 or 2025-26**

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

Reporting Requirements, 1 of 3

- **For all financial aid recipients reported**
  - Report Financial Aid for each of five terms
  - Report Enrollment status for each of five terms
  - Report non-need-based aid received for all need-based recipients
  - Required fields:
    - SSN
    - First Name
    - Last Name
    - Gender
    - Is State Resident
    - Year In School
    - Rejected ISIR WASFA
    - Enrollment Status per term
    - Financial Aid per term – even if '0'

Reporting Requirements, 2 of 3

- **.CSV file requires header row (revised sample is available)**
- **Financial aid reported for each of five terms:**
  - Summer 1 (used primarily for leader/header awards)
  - Fall
  - Winter (semester schools to report as zeros '0')
  - Spring
  - Summer 2 (used primarily for trailer awards)
  - Clock hour schools may have awards for all 5 terms

Reporting Requirements, 3 of 3

- **When to include summer aid in your reporting**
  - Review Chapter 2 of Manual for detailed information.
  - Summer aid reported are amounts received based on 2022-23 FAFSA or WASFA.
  - In general:
    - Leader/Header schools to report Summer 1 aid (Report Summer 2 as '0')
    - Trailer schools to report Summer 2 aid (Report Summer 1 as '0')
    - Clock hour schools may report aid for both summer terms
  - If recipient enrolled more than one "term" in same summer – report total amount received and enrollment status as one enrollment term.

FAFSA & WASFA Related Fields

- **Fields to also report for 2022-23 FAFSA & WASFA filers**
  - ISIR/WASFA Transaction #
  - Rejected ISIR/WASFA
  - Marital Status
  - Is Dependent
  - Family Size
  - Number in College
  - Family Income
  - Expected Family Contribution (EFC)
  - Cost of Attendance (COA)
  - Need Duration
  - Need Amount

SPECIAL NOTES ABOUT SELECTED FIELDS

Social Security Numbers

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

Year in School

'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 2022-23 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.

Family Information *

- **Family Size**
  - Generally reported from the FAFSA or WASFA
  - Must be 2 or higher for dependent students
  - Must be 1 or higher for independent students
    - If married, must be 2 or higher
- **Number in College**
  - Must be 1 or higher
  - Cannot exceed the Family Size
  - Parents' enrollment in college should not be included unless it is a professional judgment decision

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

Family Income *

- **Report the Family Income (taxable and untaxed) based on a review of the 2022-23 FAFSA or WASFA**
  - Generally, will be the 2020 income from FAFSA or WASFA.
  - If a professional judgment decision was made, report that income. **
  - Report integers without dollar signs or cents (e.g., 44010 and -10123).
  - The only place in the file where negative numbers can be used.

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

** Ensure changes are submitted through federal processor or WASFA, and update CSAW record.

Expected Family Contribution *

- **Report the Expected Family Contribution (EFC)**
  - Use the Federal Methodology (FM) calculation produced by U.S. Department of Education based on the 2022-23 FAFSA, or WASFA, EFC.
    - Report FM EFC if Institutional Methodology produces different EFC
  - May be adjusted by professional judgment decisions.
  - Should reflect the number of months reported in Need Duration.

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

Cost of Attendance

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

Need Amount

Cost of Attendance

- Expected Family Contribution

= Need Amount

- Base all three items on number of months reported in Need Duration.
- For Need Amount, report the amount used in the disbursement of aid.
- Report Need Amount as '0' or higher (do not report negative values).

Need Duration

- Report Need Duration based on the number of months for which the Need Amount and Cost of Attendance were reported.
- Normally report as integers from 1 - 12.

Term Enrollment Status

Undergraduate Enrollment Status	Credits	Scheduled Clock Hours	URR Codes
Not Enrolled	n/a	n/a	'0' or 'Not enrolled'
Full-Time	12.0 or more	300 or more *	'1' or 'Full time'
Half-Time	6.0 – 8.9	150 – 224	'2' or 'Half time'
Three-Quarter Time	9.0 – 11.9	225 – 299	'3' or '3/4 time'
Less Than Half-Time	3.0 – 5.9	75 – 149	'5' or '< Half time'

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

Term Enrollment Status – ctcLink System

- **Term Enrollment Status**
  - Enrollment statuses are pulled from the FA Load field on the FA Term page
  - FA Term values are translated and included in the csv data file.
    - F = 'Full time'
    - T = '3/4 time'
    - H = 'Half time'
    - L = '< Half time'
    - N = 'Not Enrolled'

WA College Grant, College Bound Scholarship, Passport to College, and WCG-Bridge Grant

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

Reporting of tuition waiver dollars for WCG and CBS recipients

- Required for 2022-23
  - Accurate representation of all forms of assistance that needy students are receiving.
  - Include the full assessed tuition & fee amounts in each student's Cost of Attendance to reflect tuition prior to application of waiver(s).
  - Report waivers as a financial aid resource in the appropriate field:
    - Need-Based Institutional Gift Aid
    - Non-Need Based Institutional Gift Aid

State Work Study

- Report on-campus & off-campus employment separately.
- Report students' total gross earnings, including employer match or institutional share.
- Include summer employment.

  Report either:

  - Actual gross earnings based on monthly cut-off dates or institutional payroll dates.
  - Average gross term earnings over the academic year for all terms student was enrolled at least half-time.

Institutional Gift Aid

Report Institutional Gift Aid as either:

- Need-Based Institutional Gift Aid – all institutional grants, scholarships, and/or waivers awarded solely or partially on a review of the 2022-23 FAFSA or WASFA.

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

Other State Funded Gift Assistance

Report sources of state aid not reported elsewhere.

Examples include:

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

EDITS

Ensuring Data Quality

- Edits help ensure data quality.
- The URR is utilizing informational edits beginning 2022-23.
- Appendix C lists all edit errors and what action needs to take place.

Errors that Prevent File Upload

Refer to Appendix C (page 83) 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 83-86) in the Manual**
  - Non-resident with WCG or other state aid
  - Number in College is greater than Family Size
  - No Valid Institutional SWS Allocation in Portal

Overrideable Error Examples

- **Refer to Appendix C (pages 83-86) – Field Content**
  - Need Amount is Zero with Need Based Aid.

    Example: Budget changed with dropped credits
  - Year in School for Aid Type (Federal Grad PLUS Loan).

    Student graduated mid-year, changed to graduate status the following term
  - Cost of Attendance minus Expected Family Contribution (calculated by the edit program) does not equal Need Amount reported by college.
  - Date of Birth outside normal range is now an Informational message only.

Edits – ctcLink System, 1 of 3

- **Edit Reports**
  - Recommended that reports be reviewed and worked in order shown here to verify that set up and errors are addressed prior to reviewing data to be included in the URR extract file.
- **Report C (CTCFAURR_C)-Missing Item Type Report**
  - This report will identify any FA Item Type that has been awarded to a student with an amount greater than zero and qualifies to be reported in the Unit Record Report extract file, but the item type does not exist in the Unit Record Report Config setup page.

Edits – ctcLink System, 2 of 3

- **Report B (CTCFAURR_B) – Error Detail and Summary Report – this sample report is separated into 2 sections:**
  - The first tab contains a list of students, sorted by Last Name, First Name, and then EmplID, who have one or more errors. The error message number and description are included
  - The second tab contains a list of all error messages encountered on the first tab with a total student count for each

Edits - ctcLink System, 3 of 3

- **See Appendix C in the URR Doc for suggestions on resolving each error condition.**
- **Report A (CTCFAURR_A) – Student-detailed report**
  - This report provides a list of student details to be included in the extract file. In addition, the dollar amounts for each award received by the student is tallied and provided in the total columns

Reminders

- Keep Override comment(s) brief, but with sufficient detail to directly explain the edit response.

- Report Family Income using WCG income calculation, not federal Total Income field from FAFSA without appropriate adjustments. Income reported in CSAW for 2022-23 should reflect the WCG income calculation.

- The ISIR/WASFA transaction number reported should be the most recent used to award the student, not necessarily the last one filed. This is used to compare FAFSA/WASFA to URR and CSAW for discrepancies related to Family Income, Family Size, Number in College, or Expected Family Contribution. Comparison now appears in the On File tab in URR student record.

Reminders, continued:

- Report an adjusted Expected Family Contribution according to Need Duration if student attended less than full time/full year if your standard practice is to do so. If one element adjusted, must adjust all. EFC, Need, COA and Need Duration must all be consistently aligned.

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

Reminders – ctcLink System

- **ctcLink Unit Record Report Basic Steps**
  - Reconcile awards
  - Add or update Unit Record Report Configuration tables
  - Run Unit Record Report
    - Can be run as many times as needed
    - CSV data file is generated each time for review
  - Review reports and correct errors
  - Rerun Unit Record Report
  - Download CSV data file to desktop or local network drive
  - Upload CSV file to WSAC Portal

Tips and Best Practices

- Upload your CSV file early – don't wait for the deadline!
- Review WSAC's 2022-23 URR Manual and training materials, and test upload using the Portal training environment:

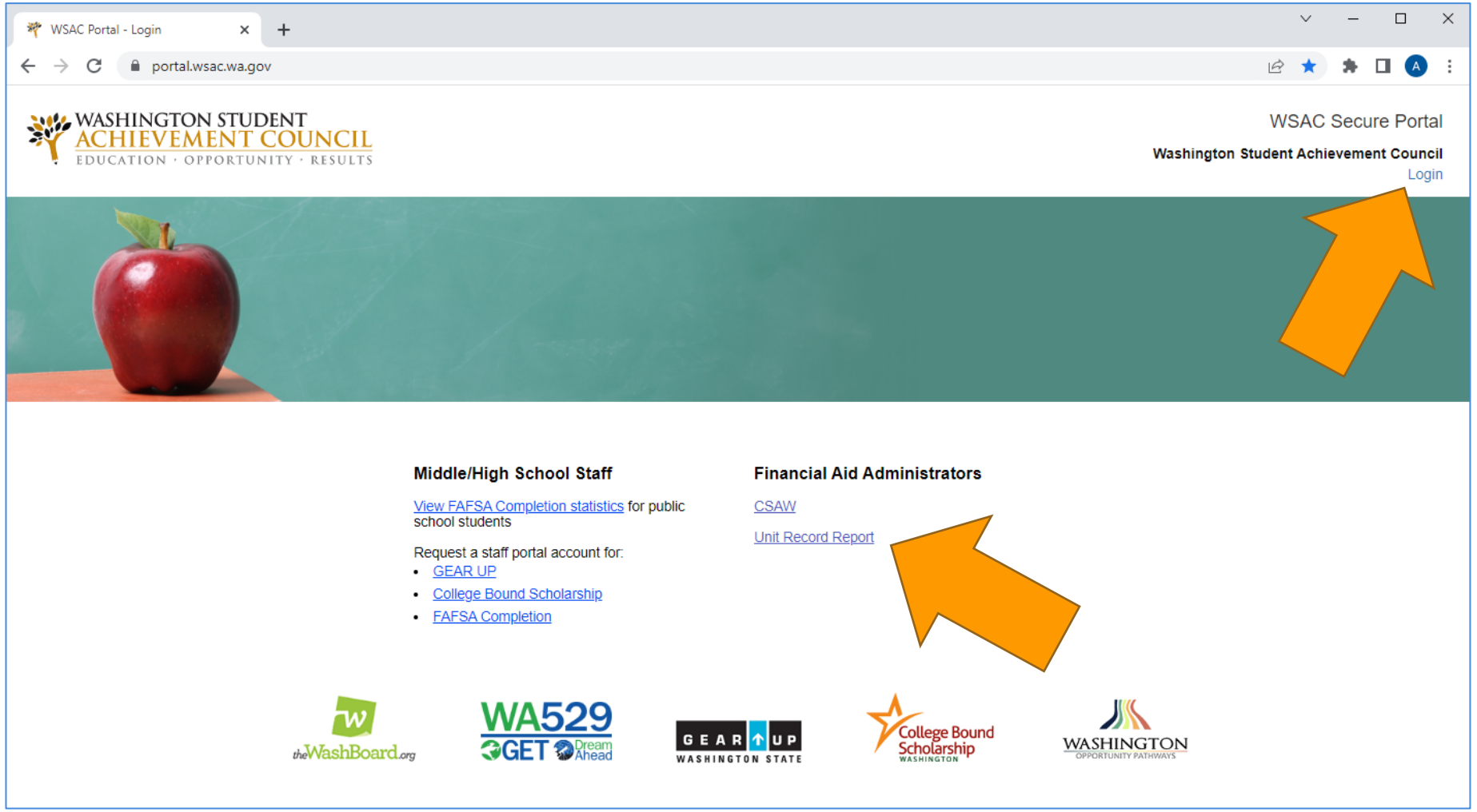
https://portaltraining.wsac.wa.gov/

(Data entered is temporary; information clears overnight)

- Use URR informational reports to check for consistency & validity.
- CTCs – Review SBCTC 2022-23 URR Processing Guide(s) when available.
- Contact WSAC with questions or issues not addressed in WSAC's URR Manual.

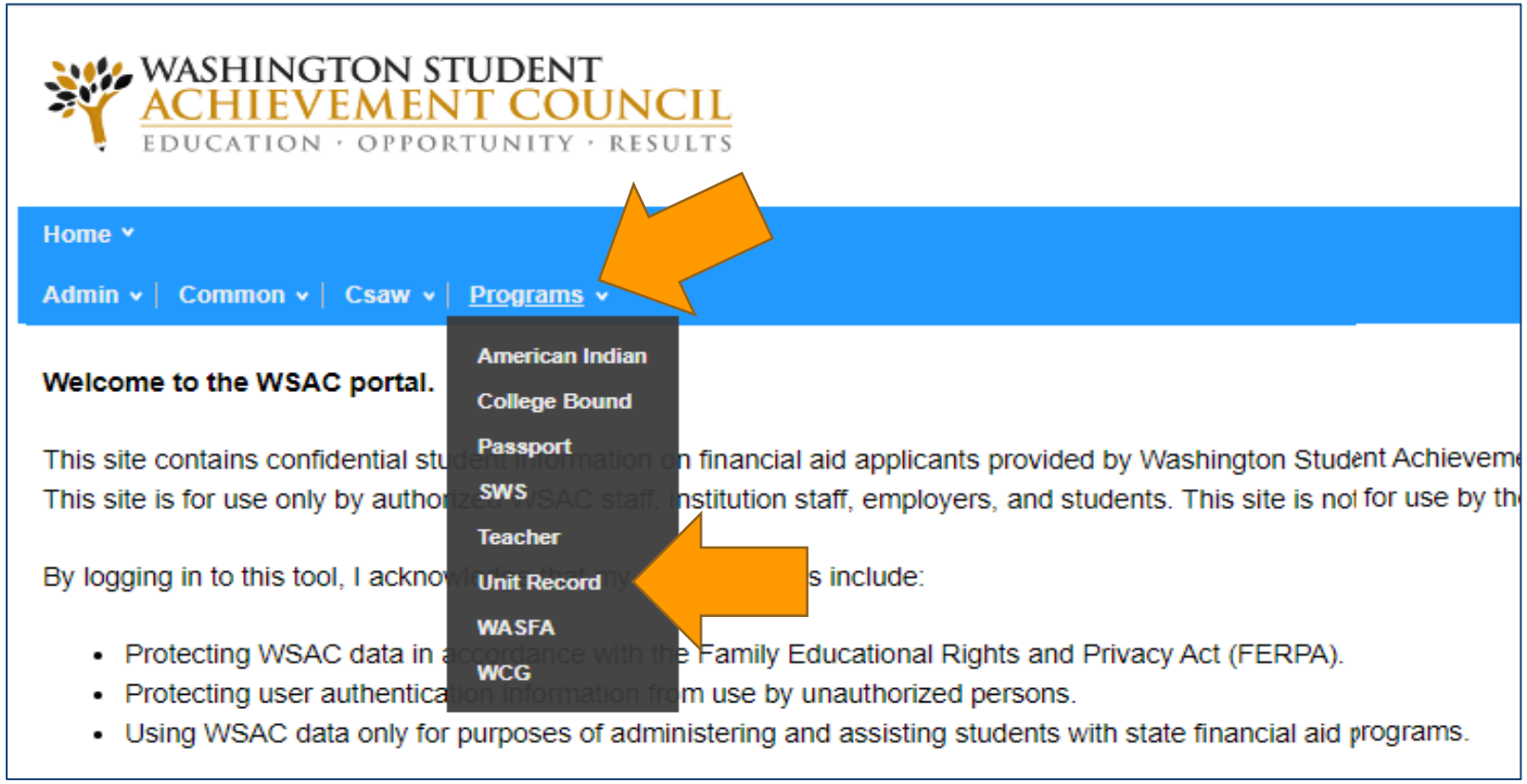
USING THE WEB APPLICATION

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



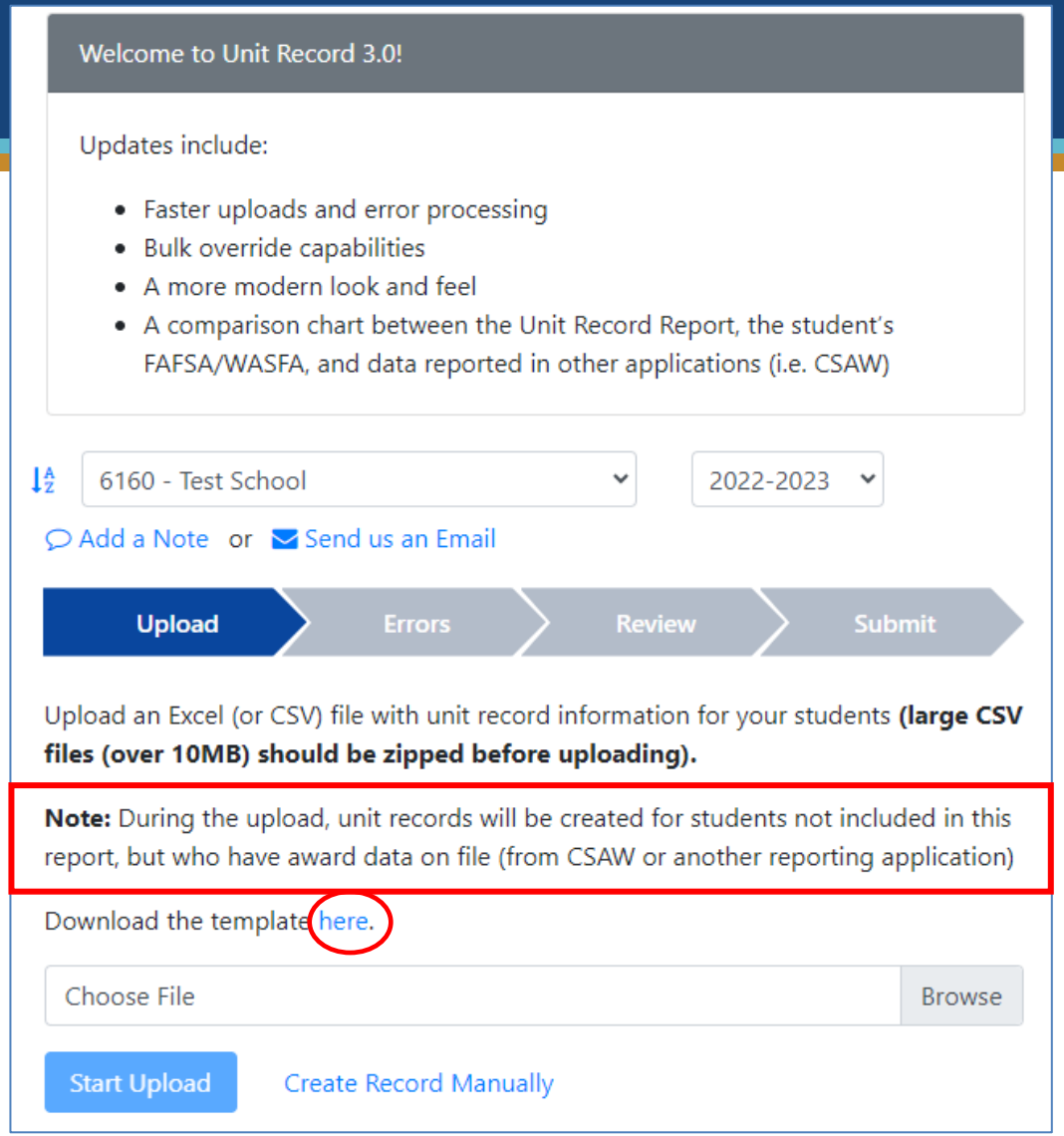
Portal URR Submission Tool

In the Programs menu, click on Unit Record.

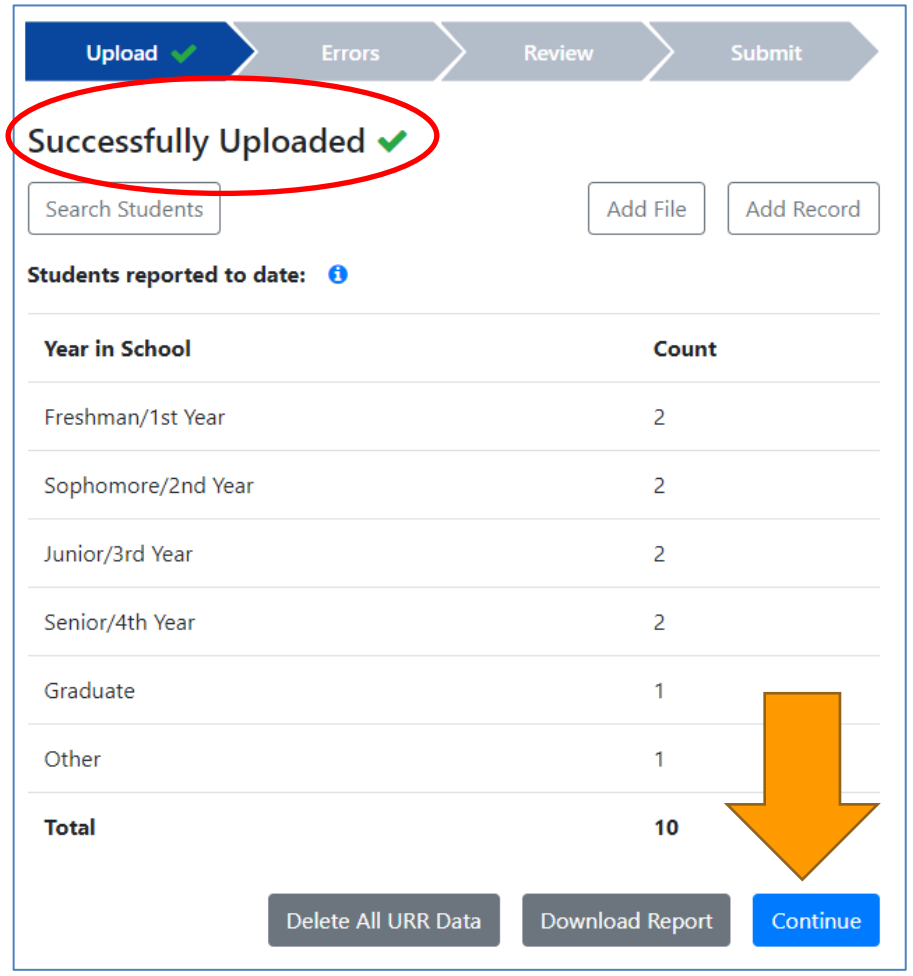


Uploading Data from File,
1 of 2

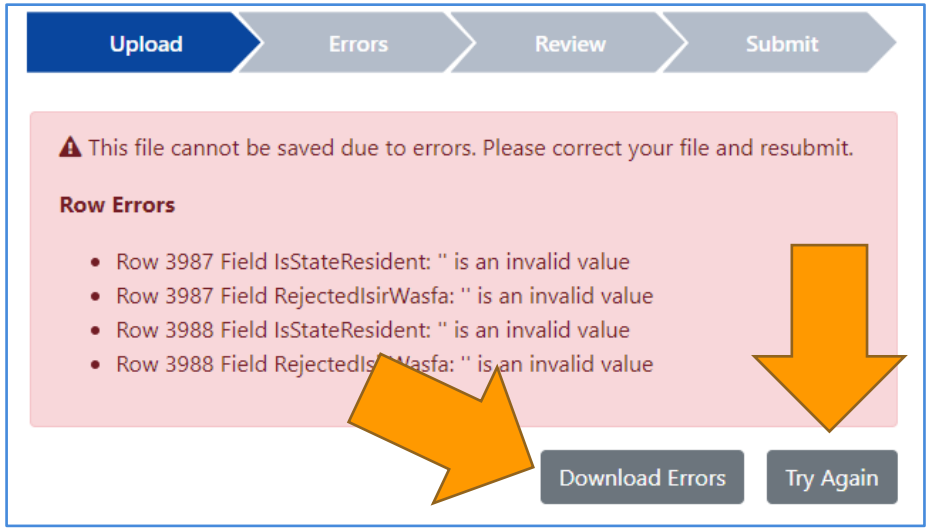
- The Welcome/Upload screen will appear, with Navigation bar tracking progress.
- Browse your file directory to select the CSV file for upload
  - **NOTE:** WSAC **auto-creates** and **adds** records to URR for students who are omitted from the upload file but have award data in WSAC records.
- Click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



Uploading Data from File, 2 of 2



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



If the upload fails due to "critical errors," download error report and 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 entered to the student record.

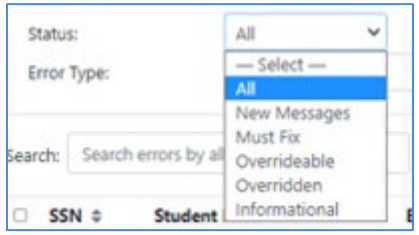
- **"Informational"**

  These errors may or may not require correction to ensure accurate 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 sufficient, or (3) if record can be left with little or no comment. WSAC does review informational error records for accuracy.

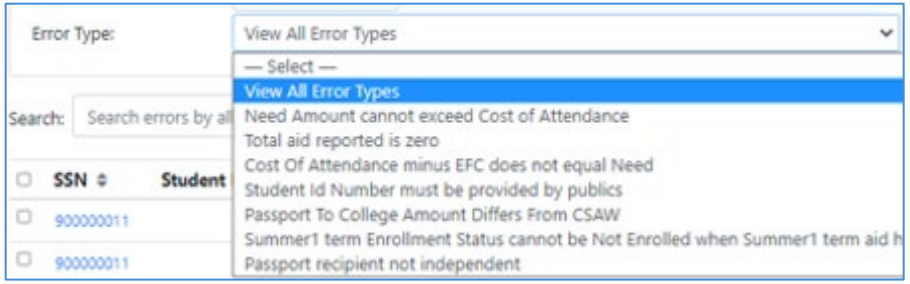
Main Error Screen

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

by status:

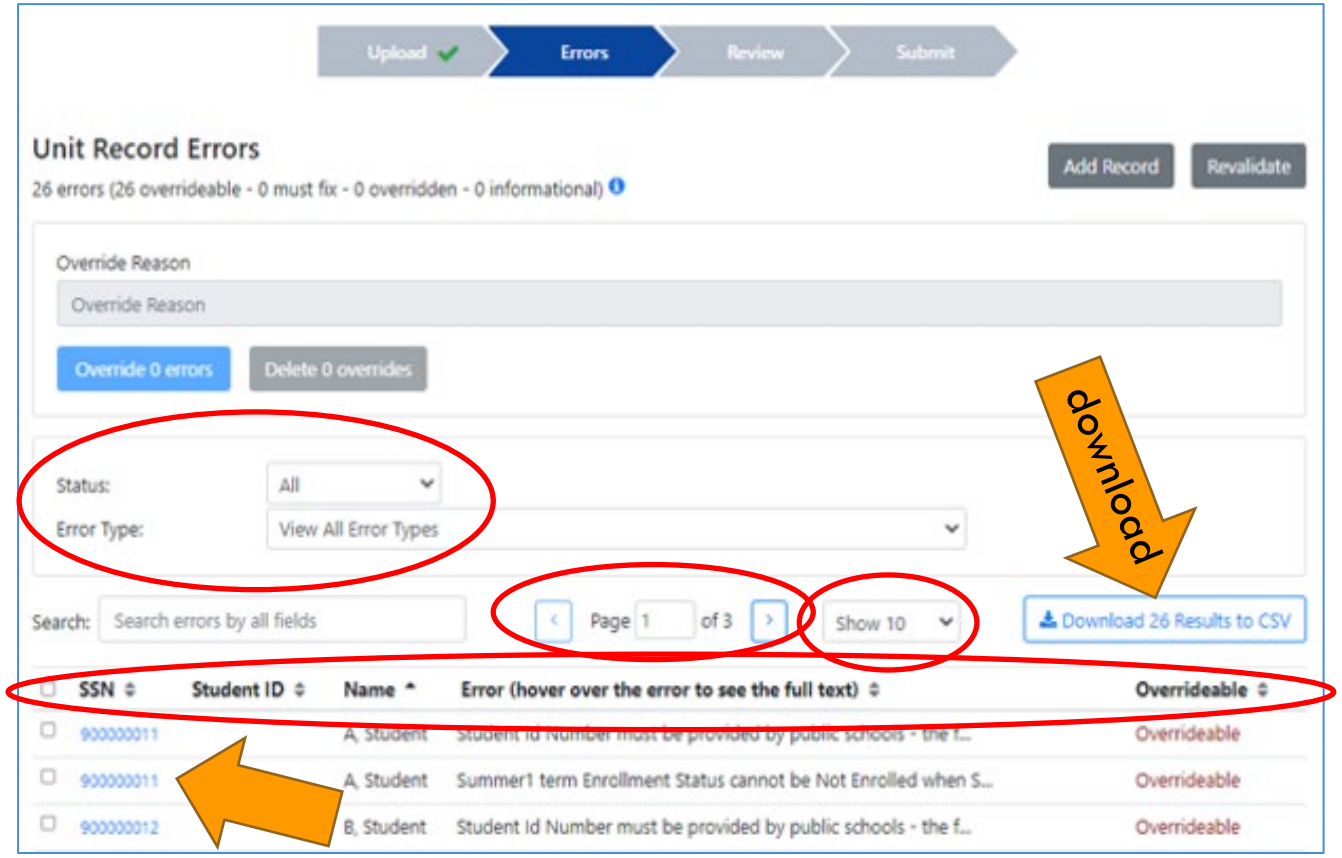


or, by Error Type:



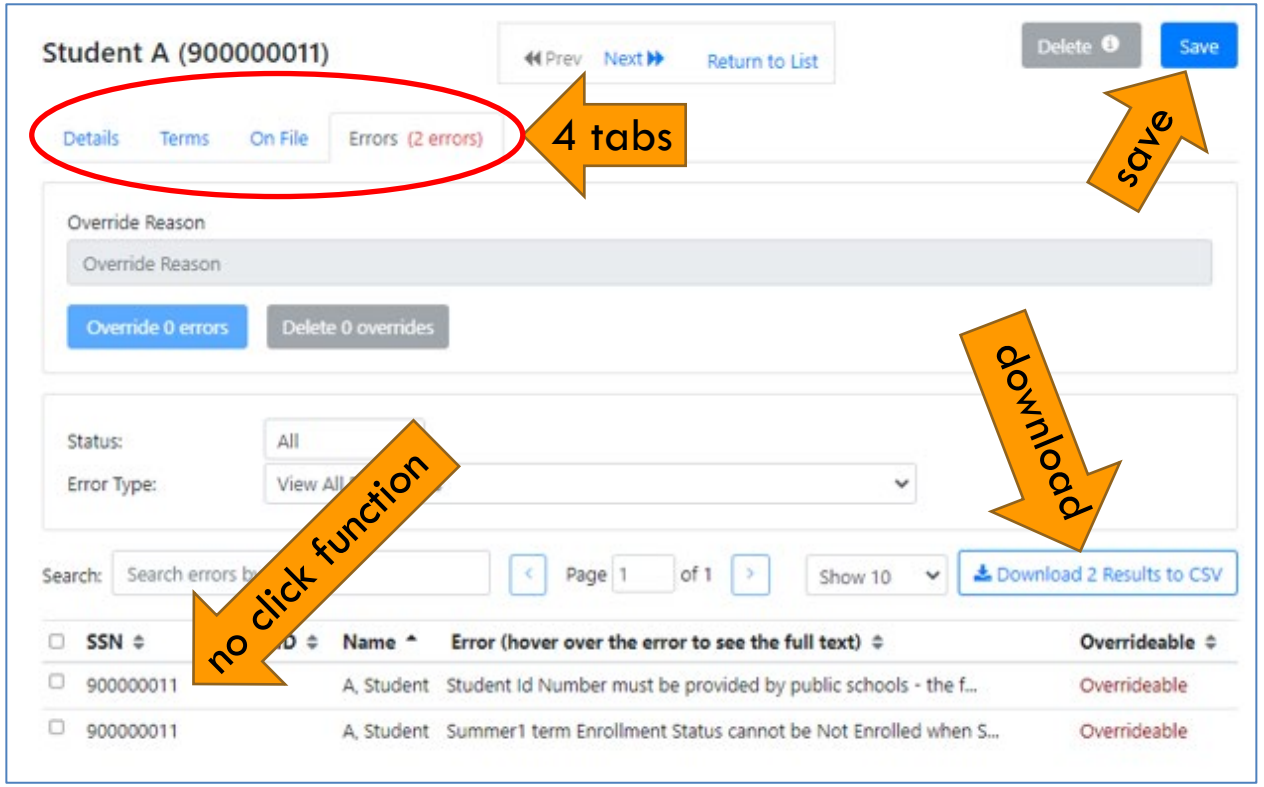
Dropdown selection of viewable records per screen

Click highlighted SSN to open record



Editing Student Records – Error tab, 1 of 7

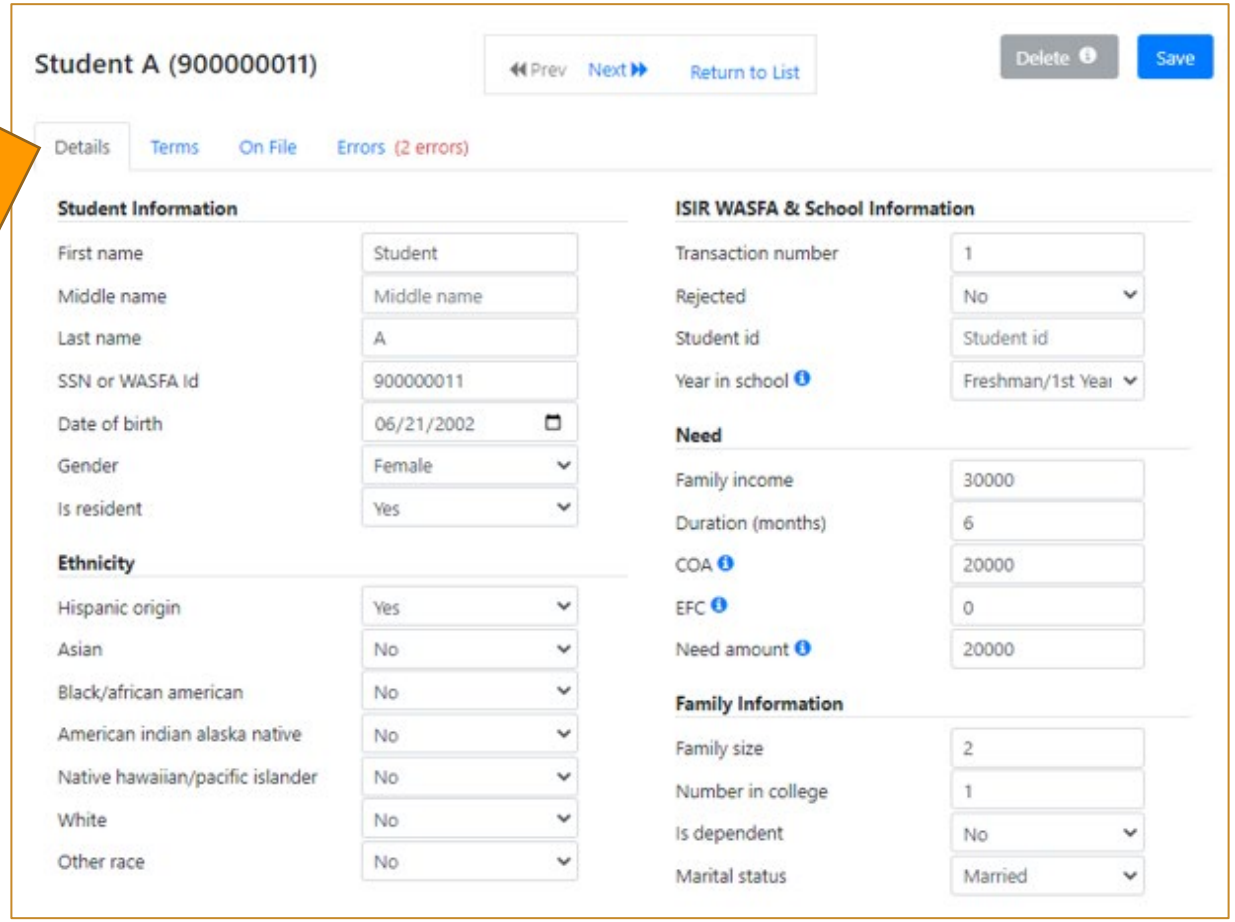
- Click one of four tabs to navigate within record
- No SSN "click" function while in the student record
- Error list downloadable
- Enter overrides from this screen or main Error screen
- Enter corrections in Details and Terms tabs. Resolved errors disappear from list.



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

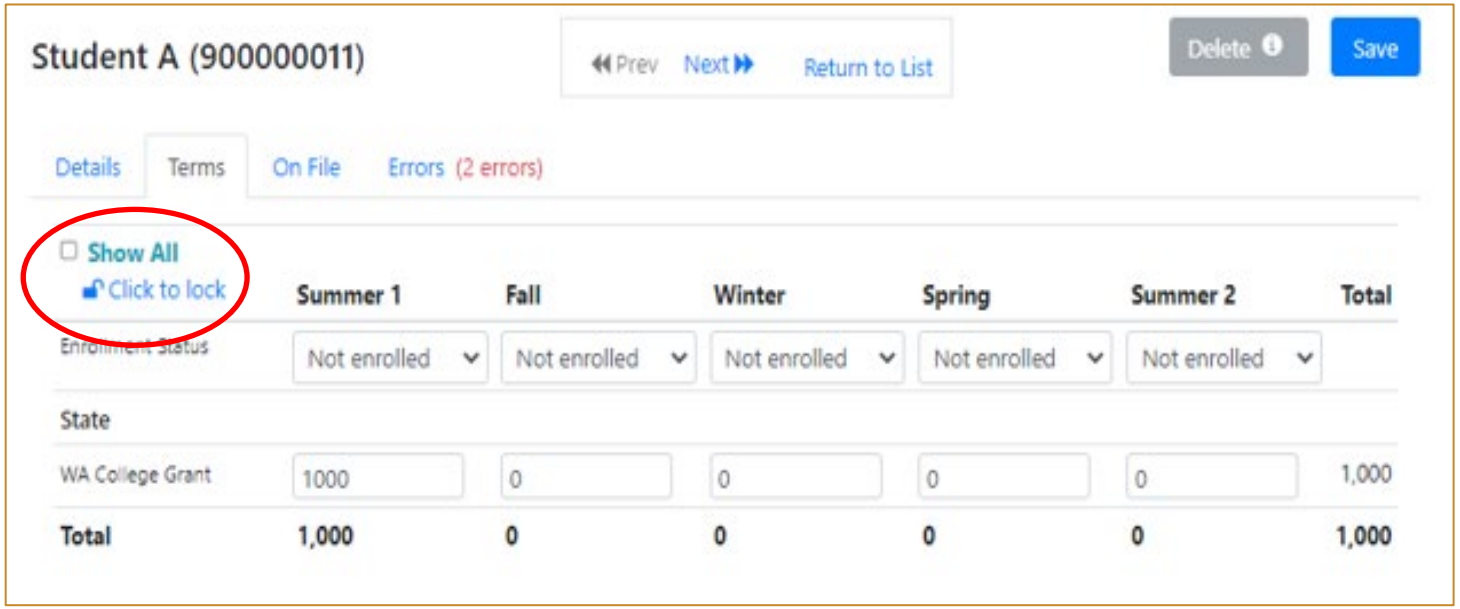
Editing Student Records – Detail tab, 2 of 7

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



Editing Student Records – Terms tab, 3 of 7

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



- Enter changes directly in data field(s)

Editing Student Records – On File tab, 4 of 7

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

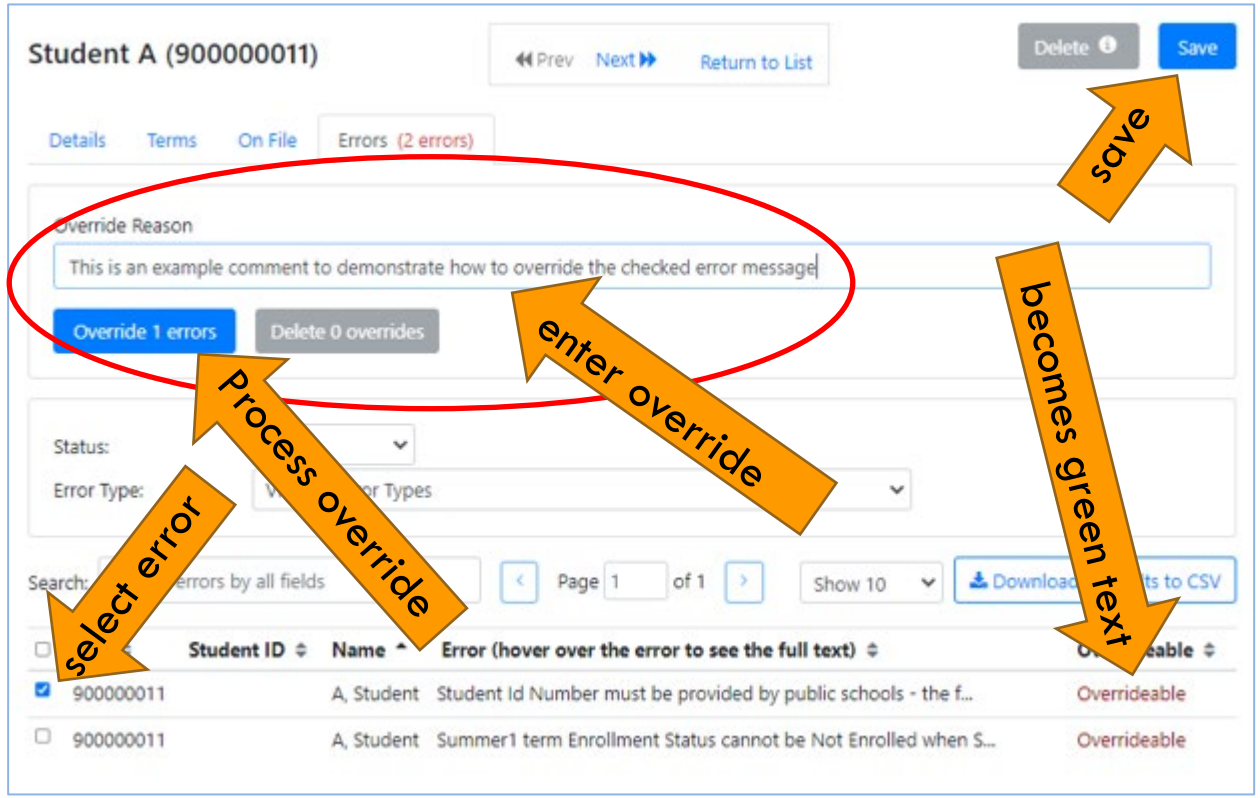
Details | Terms | On File | Errors (Resolved)

CSAW	Program Data	Unit Record	ISIR/WASFA (Trans #1)	
Family Income	$78,283	$78,283	$78,883	✗
Family Size	4	4	4	✓
Number In College	1	1	1	✓
EFC		$3,873	$11,018	✗
WCG	$144	$144		✓
WCG Bridge	$0	$0		✓
CBS	$0	$0		✓
PTC	$0	$0		✓
PTC - Incentive	$0	$0		✓
Teacher Shortage		$0		✓
Paraeducator		$0		✓
ALT		$0		✓
STG		$0		✓
National Guard		$0		✓
WAVE		$0		✓

Editing Student Records - Overrides, 5 of 7

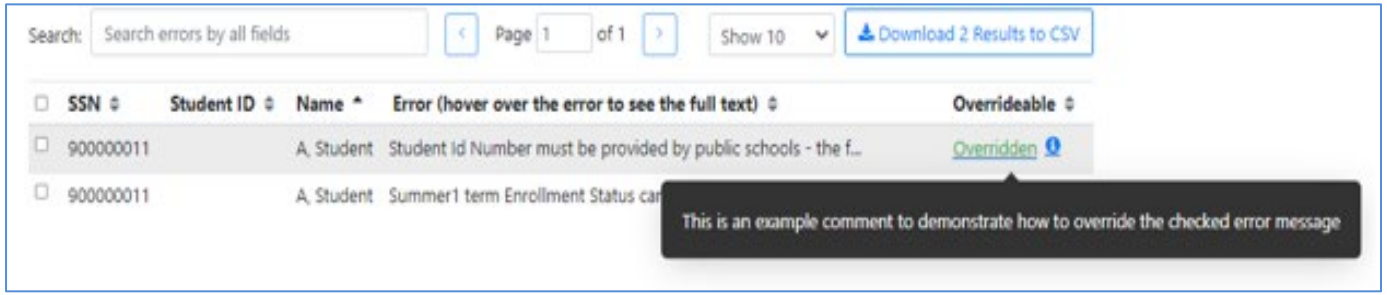
Overrides may be applied from within the student's Errors tab or from the main institution Errors screen. Recommend reviewing record tabs first.

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

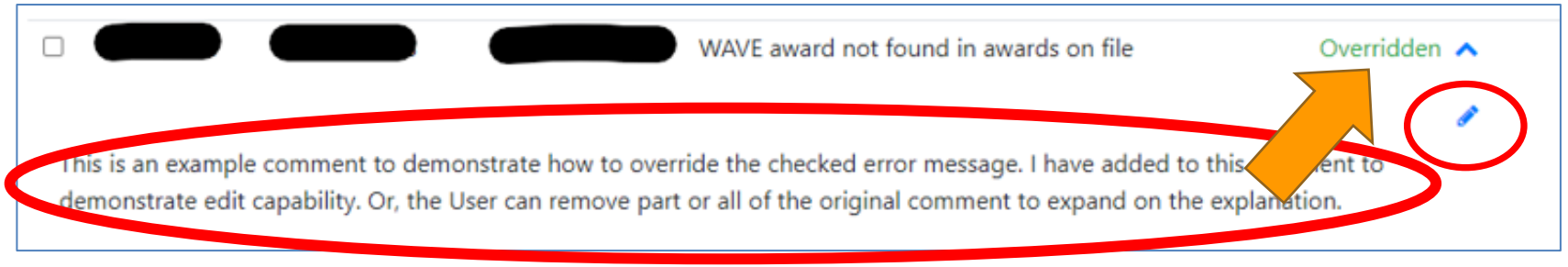


Editing Student Records, 6 of 7

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

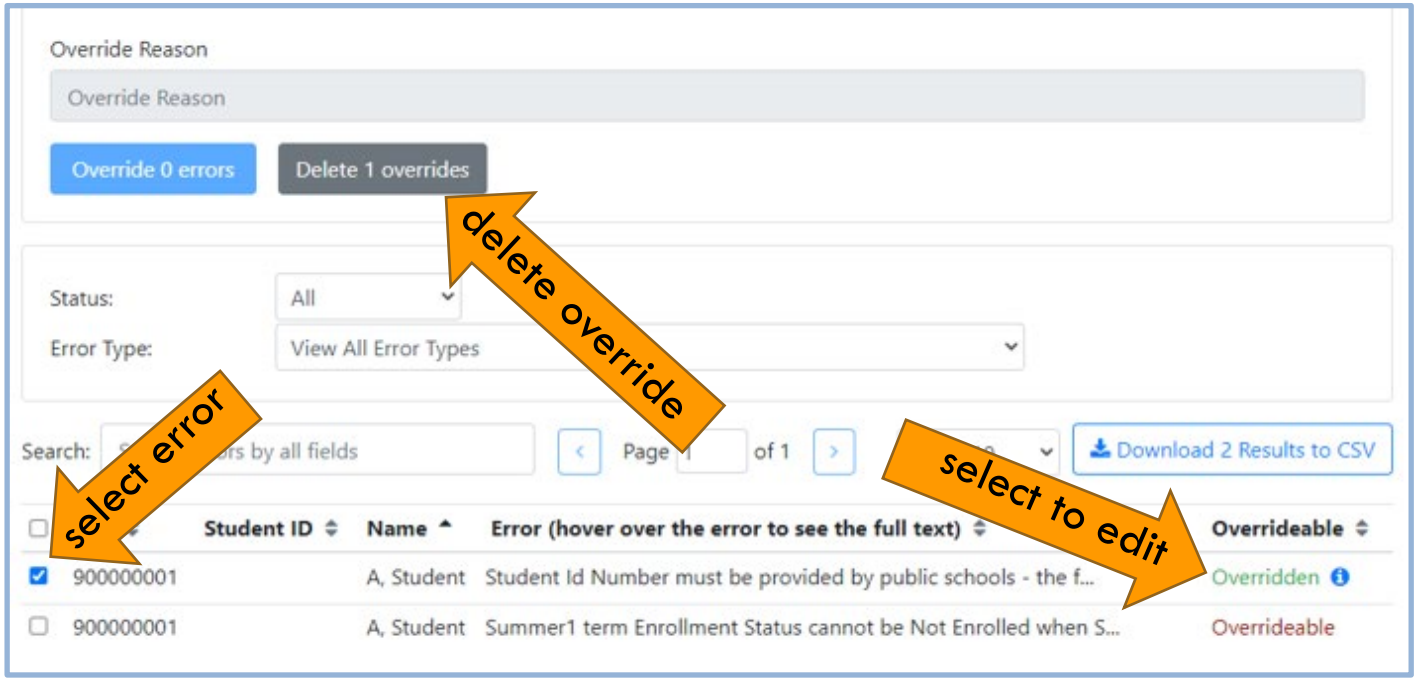


- To view Override reason as part of the Errors list, click the green "Overridden" text, and the comment will appear below the Error message.



Editing Student Records, 7 of 7

- Override comments can be edited by the original writer; otherwise, must add a new Override explanation.
- To edit, click green "Over-ridden" to expose and click pencil icon (see previous slide). Click Save.
- To delete Override, select Error, click gray "Delete Overrides"



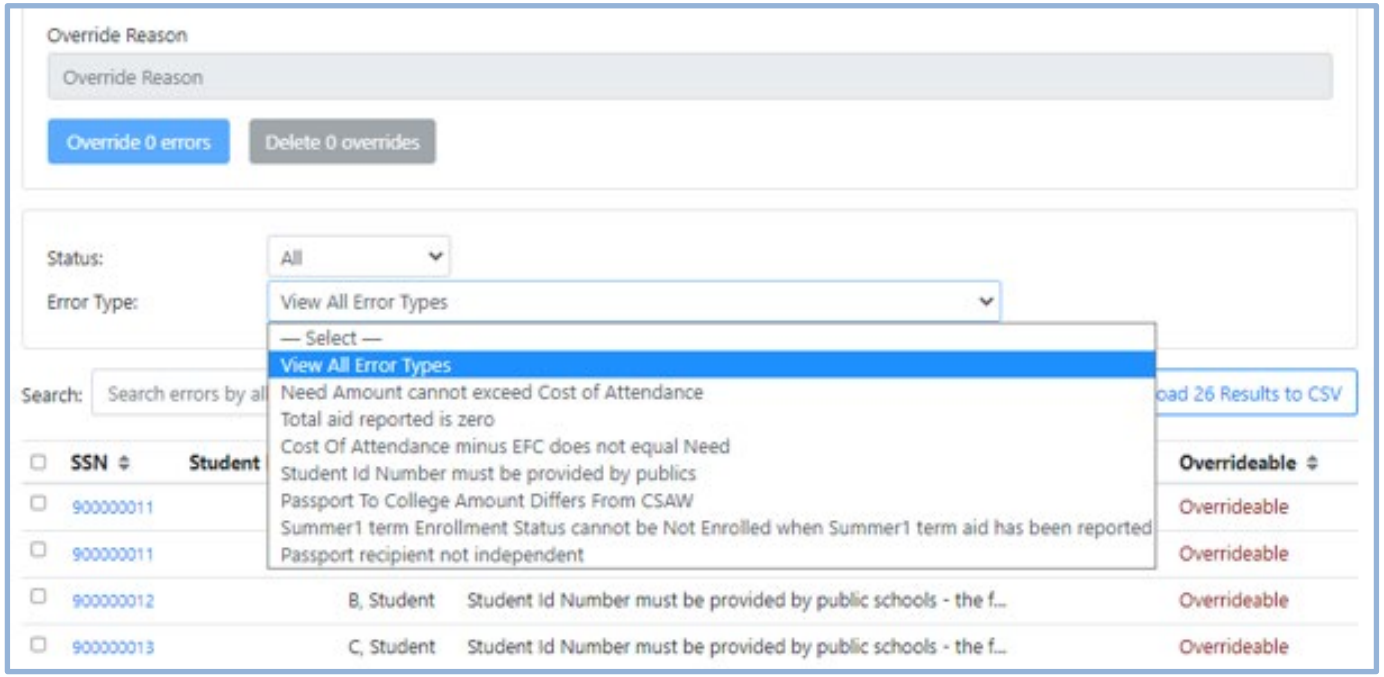
Resolving Social Security Number Differences

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

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

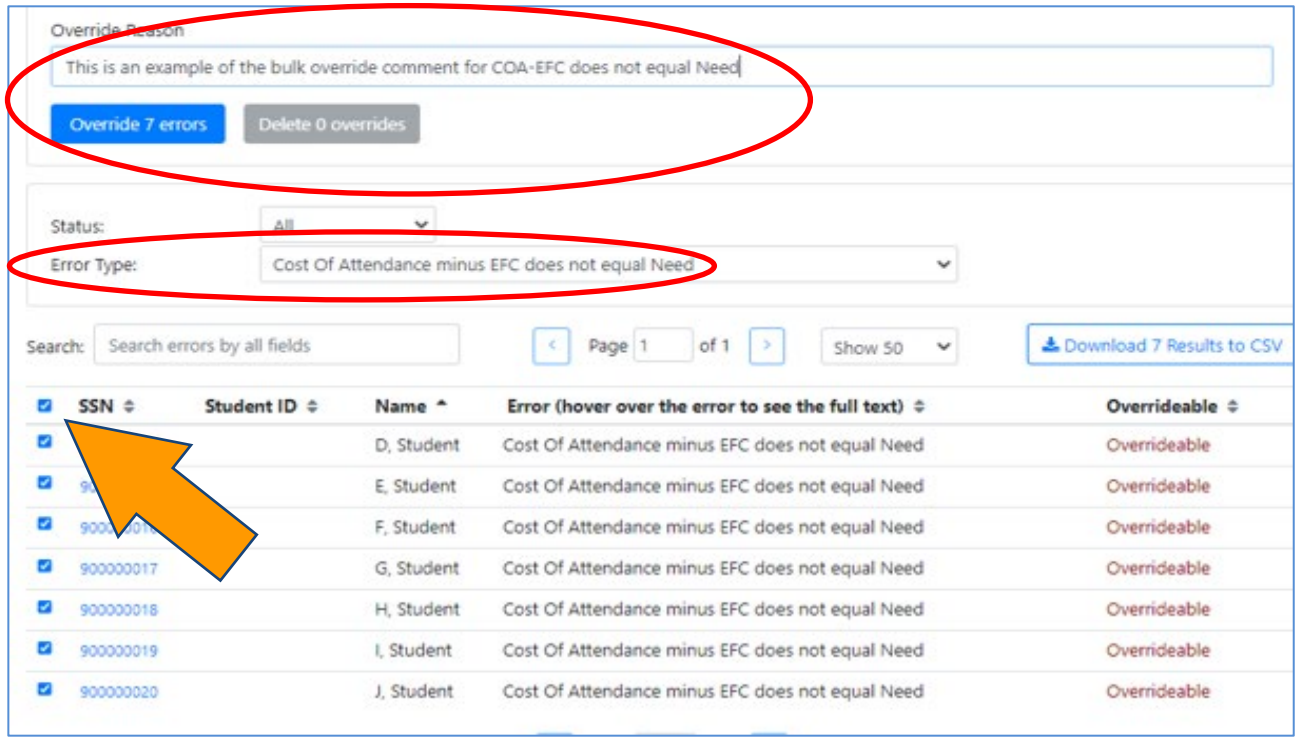
“Bulk” Override Processing, 1 of 2

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



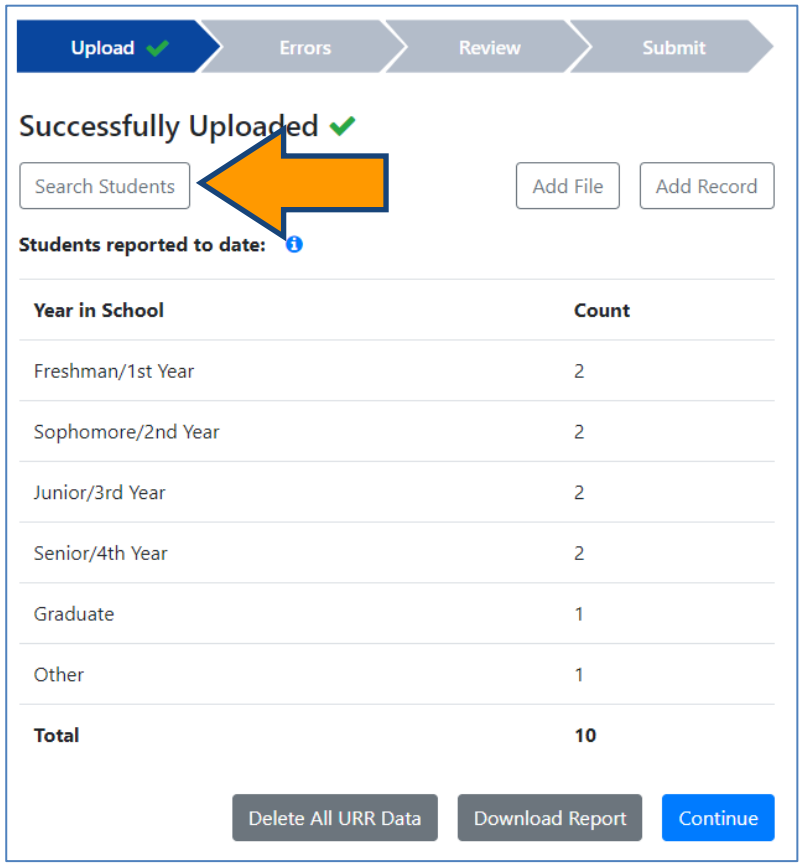
"Bulk" Override Processing, 2 of 2

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



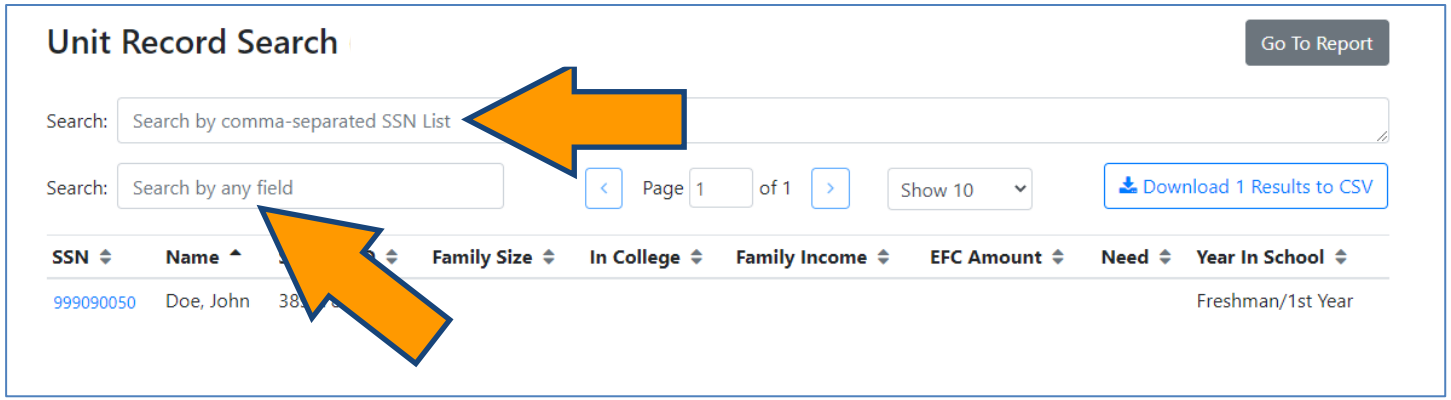
Search for Existing URR Records for Edit, 1 of 2

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



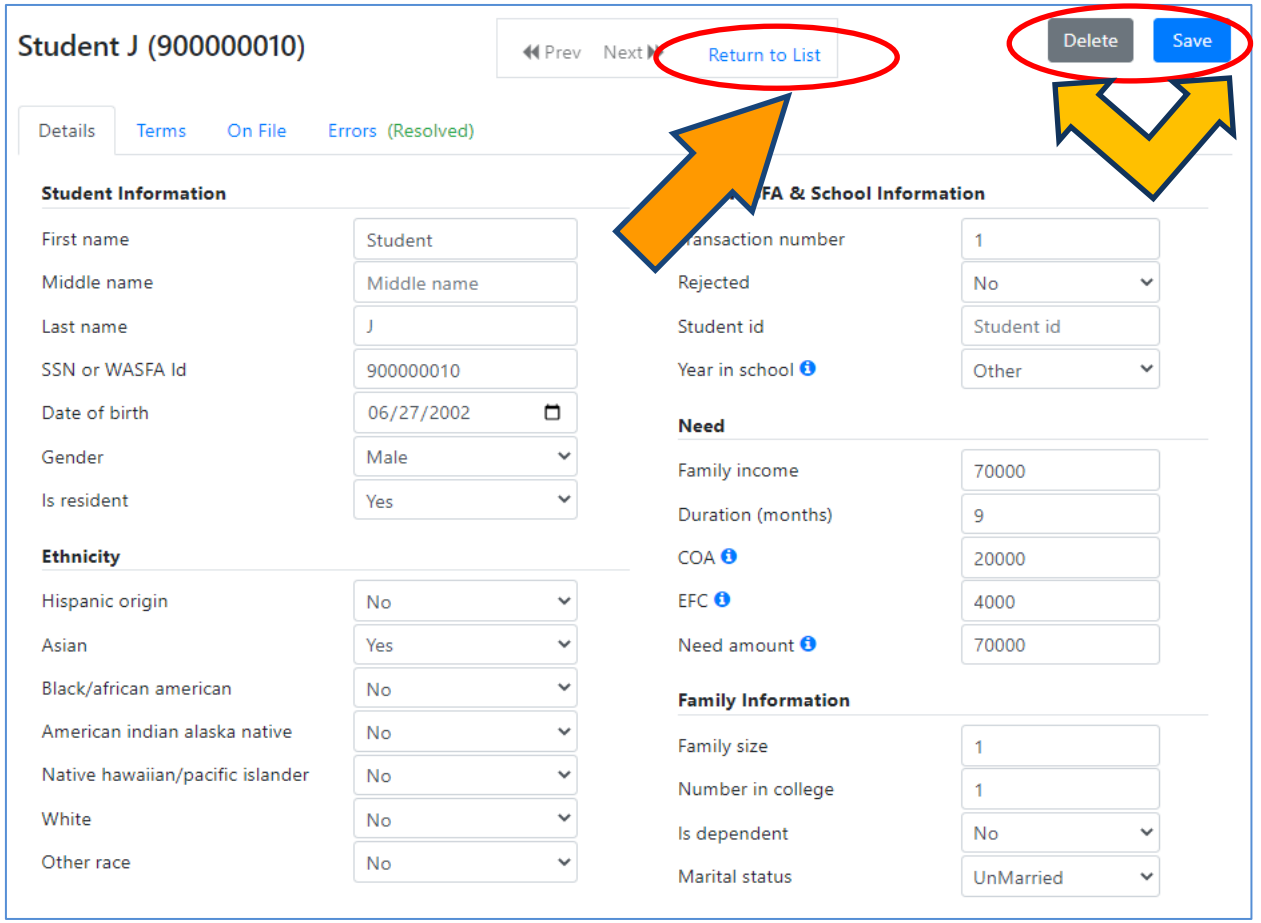
This opens the Search screen, where you can:

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



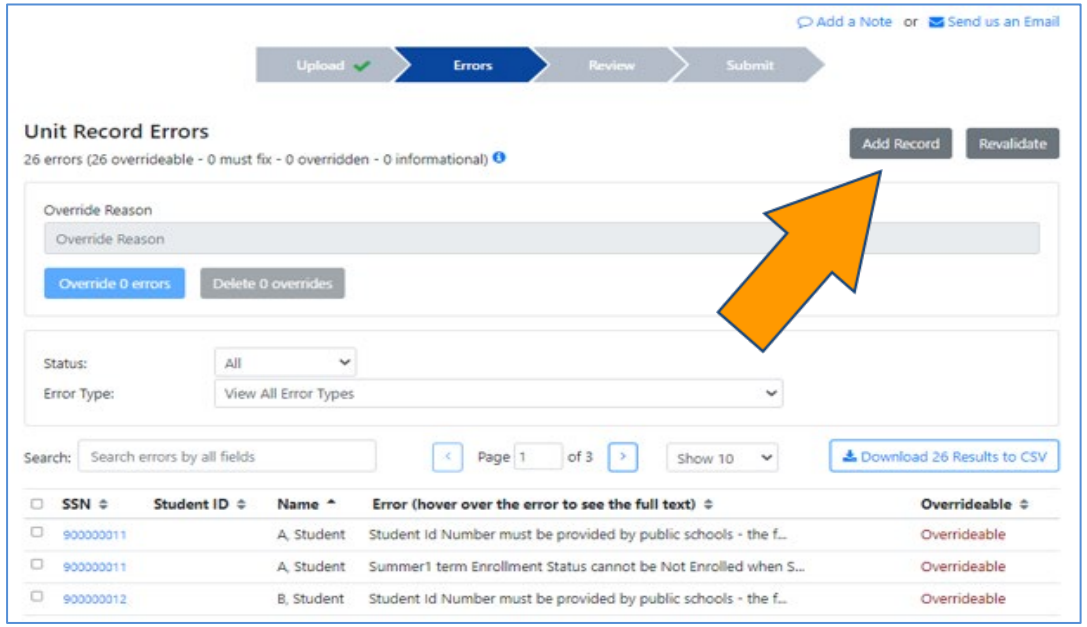
Search for Existing URR Records for Edit, 2 of 2

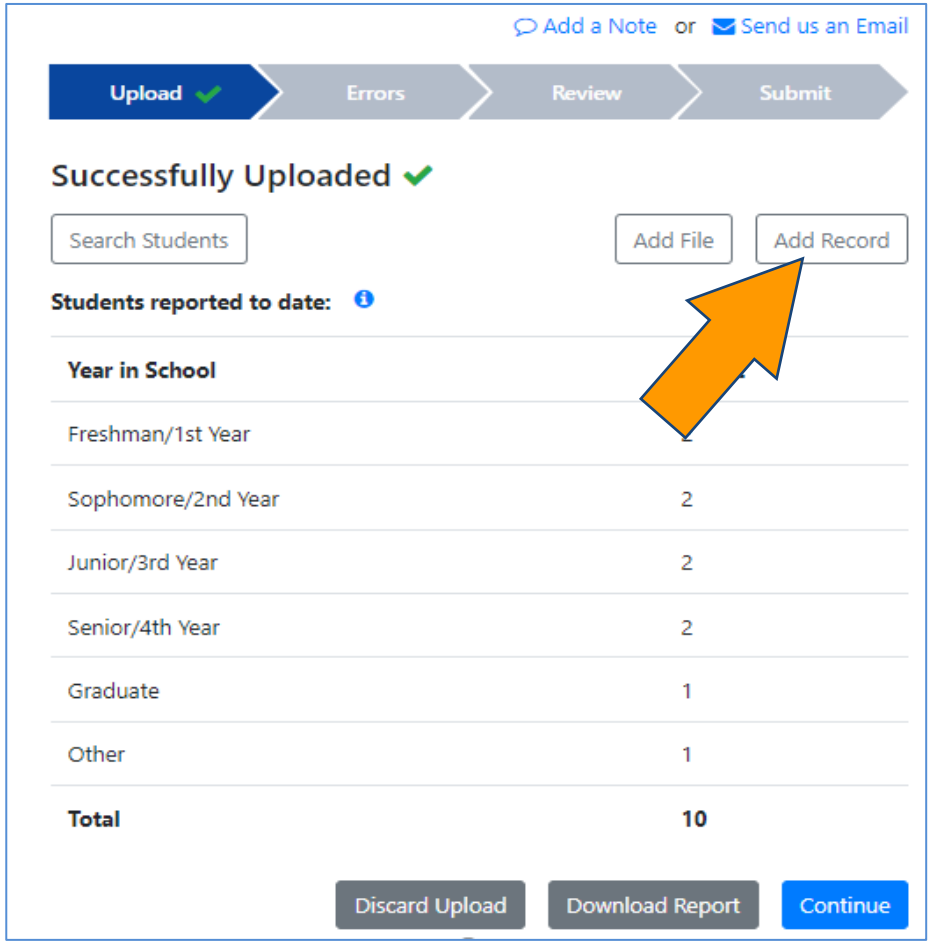
- Edit the record and click "Save," or click "Delete" to discard the record.
- Click "Return to List" to return to the Search screen.
- Then click "Go to Report" to exit "Search."



Manually Adding Student Records, 1 of 3

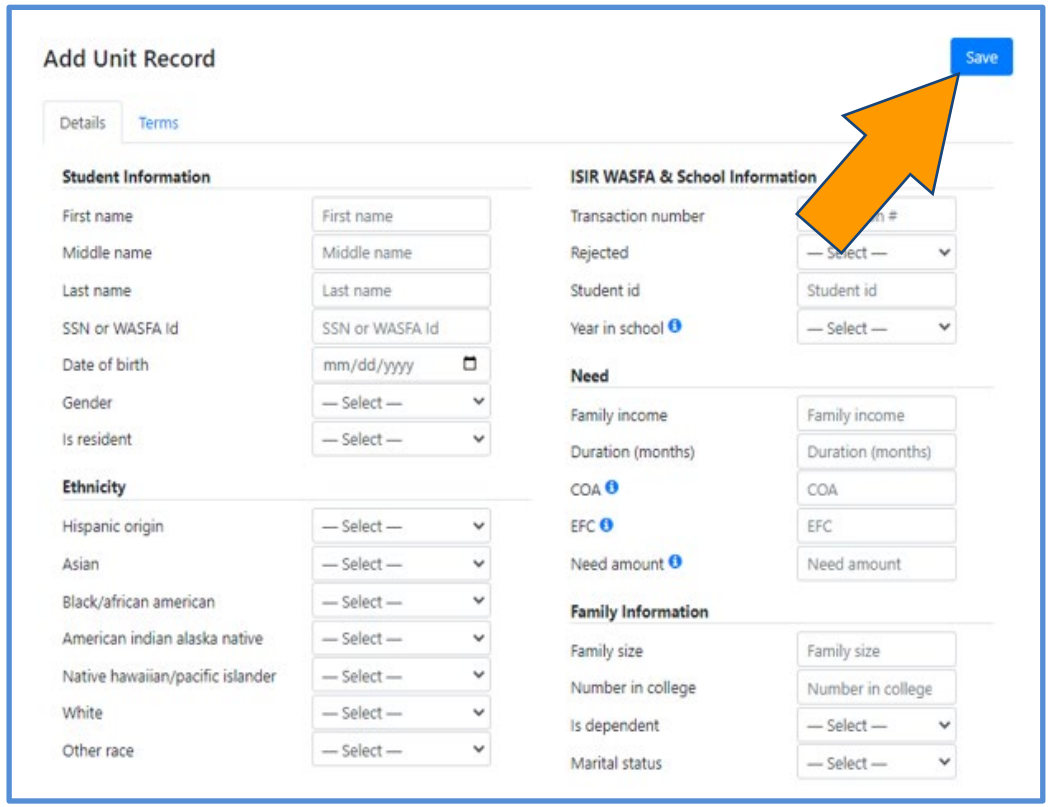
- Records may be added from either the "Upload" or "Errors" screen by clicking "Add Record"

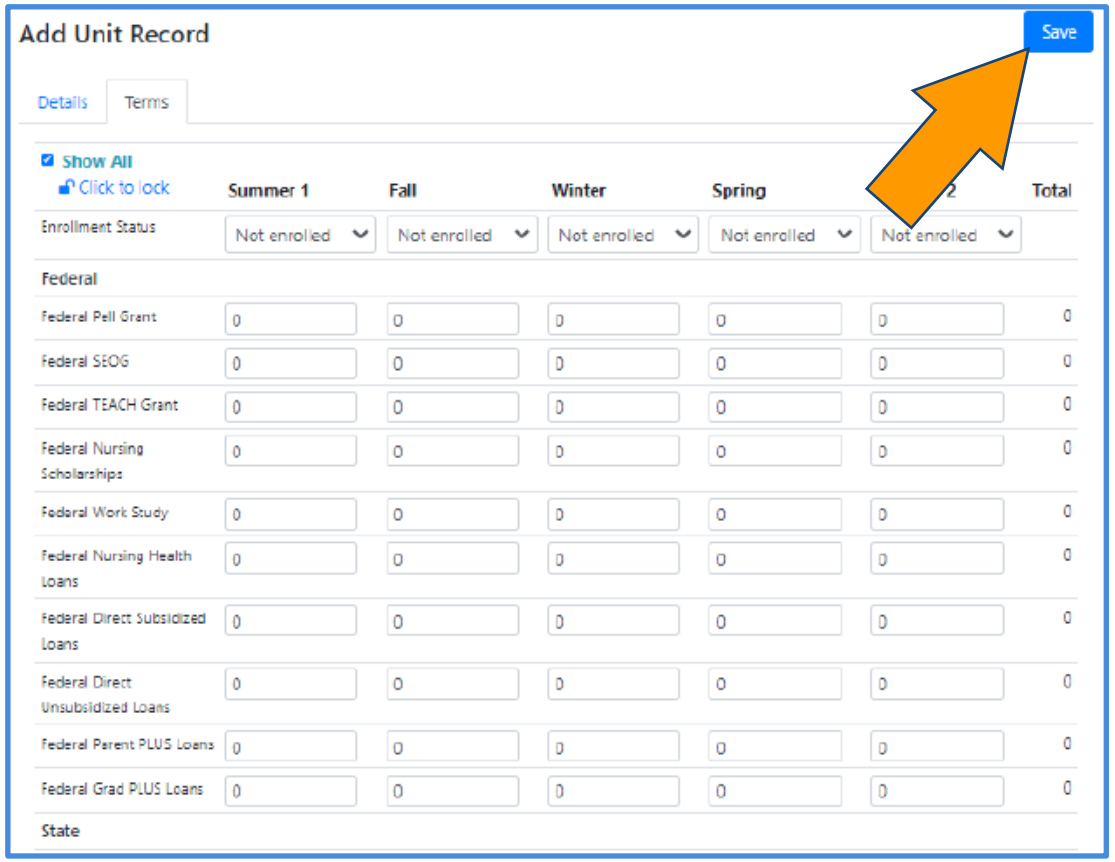




Manually Adding Student Records, 2 of 3

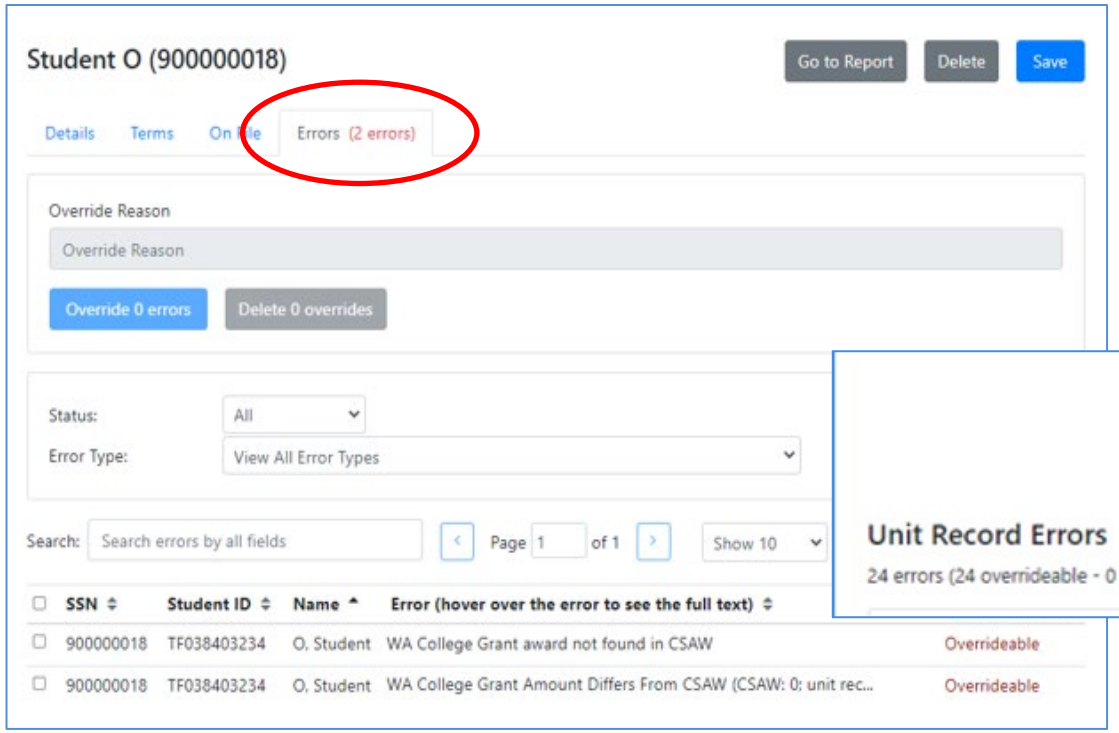
- In the blank record, complete all required fields in Detail and Terms screens, and "Save" to retain record.



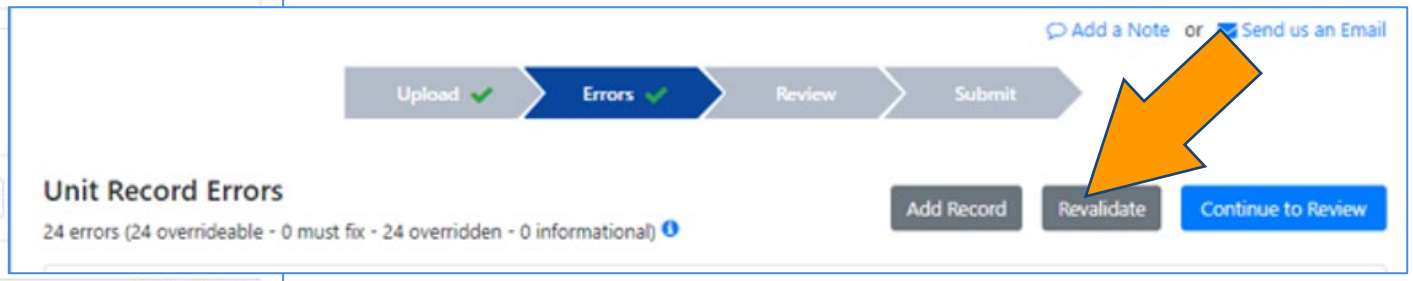


Manually Adding Student Records, 3 of 3

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

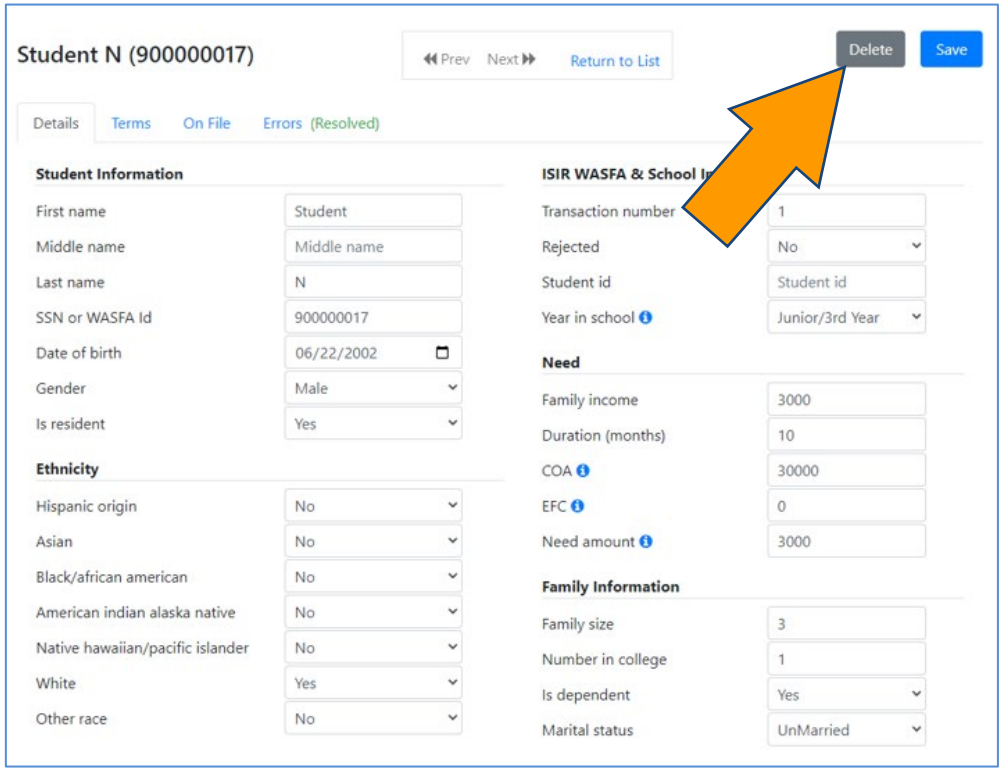


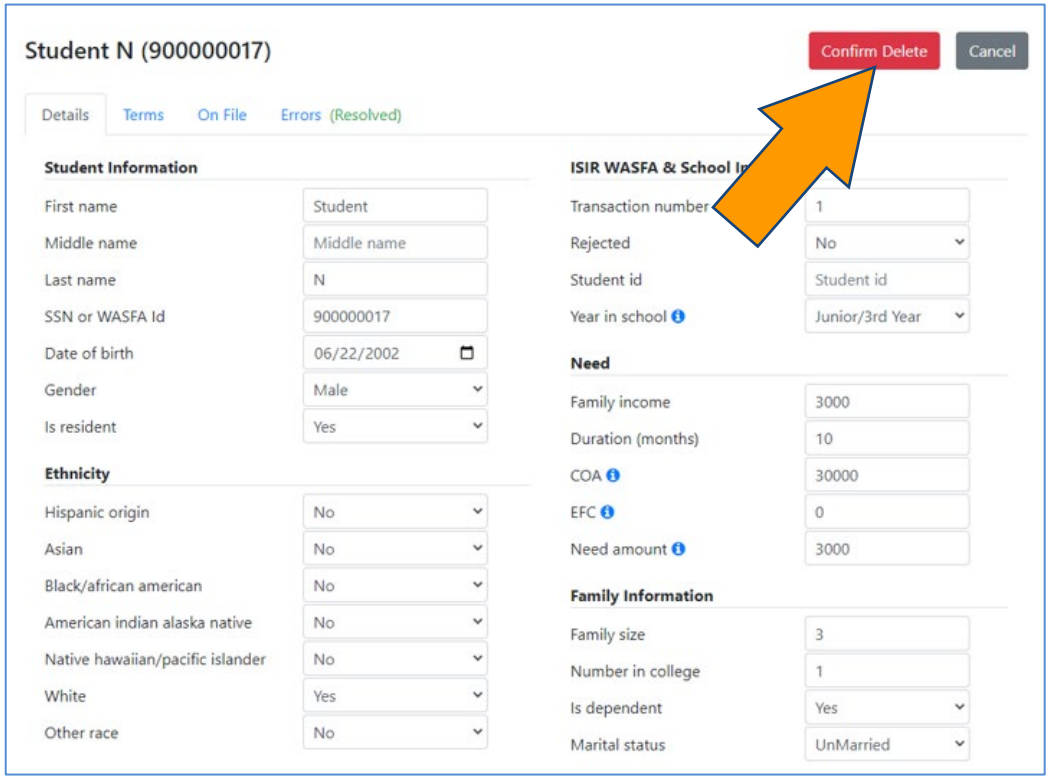
- Click "Revalidate" button after returning to the Main Institution Error screen and before proceeding to the "Review" step.



Manually Deleting Student Records

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



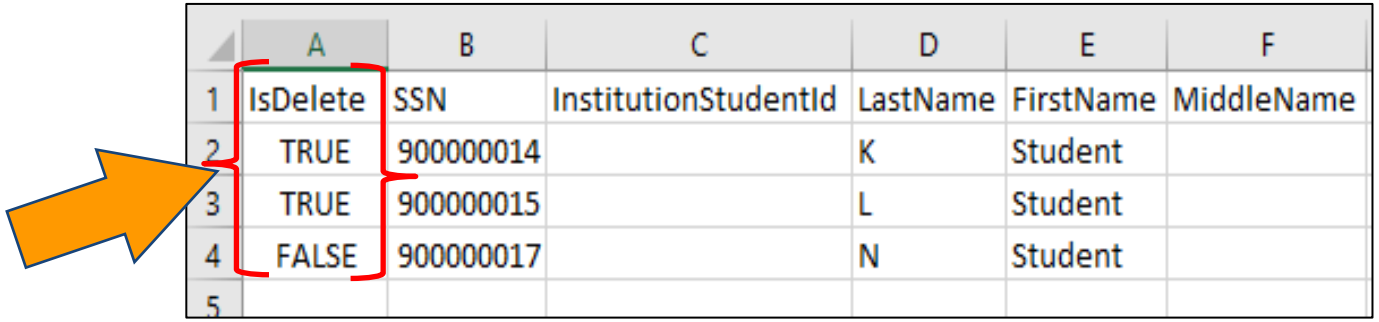


Supplemental File Uploads, 1 of 3

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

Supplemental File Uploads, 2 of 3

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

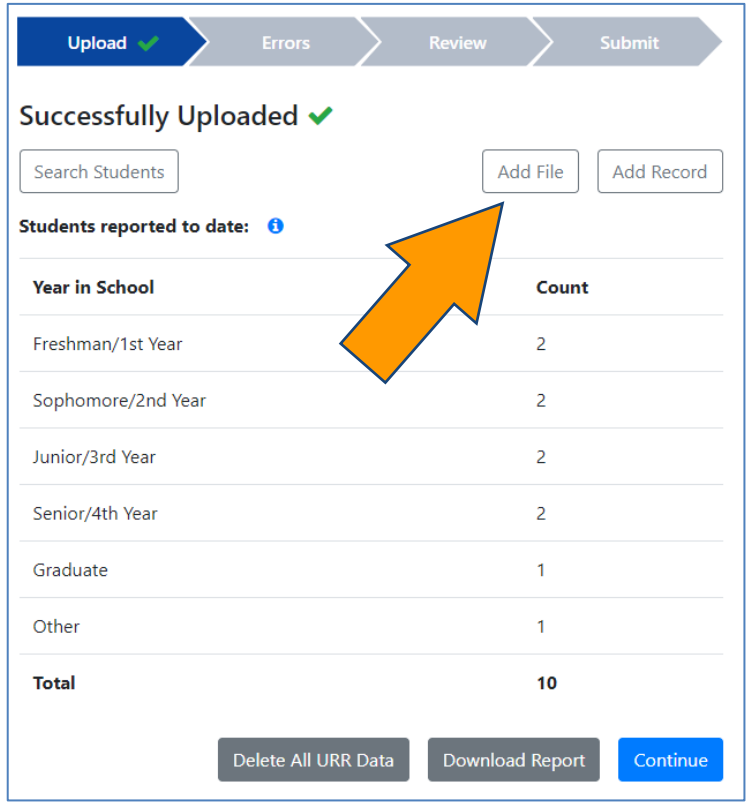


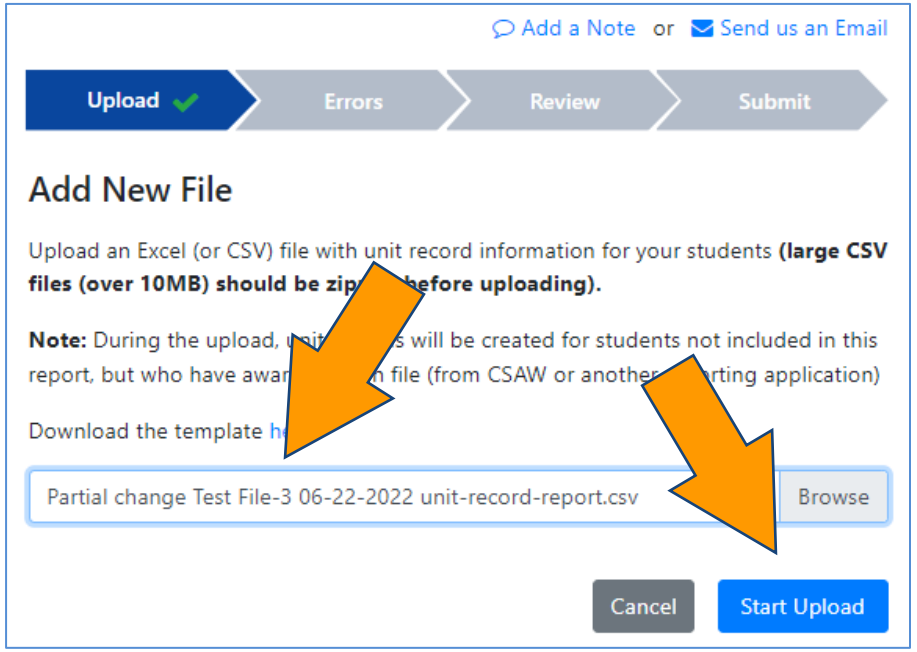
	A	B	C	D	E	F
1	IsDelete	SSN	InstitutionStudentId	LastName	FirstName	MiddleName
2	TRUE	900000014		K	Student	
3	TRUE	900000015		L	Student	
4	FALSE	900000017		N	Student	
5						

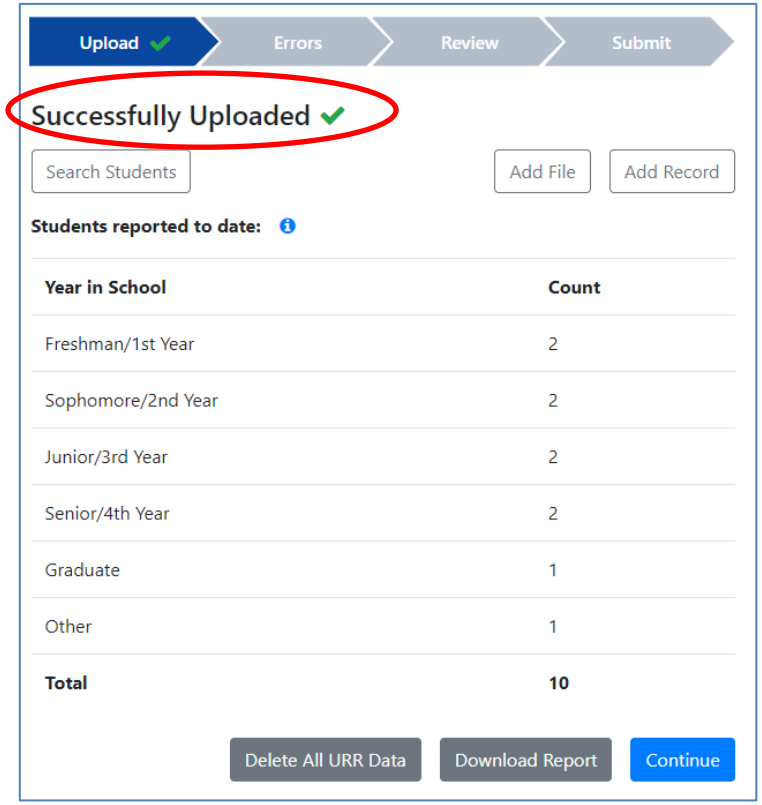
- Enter “True,” “Yes,” or “Y” in IsDelete field for record deletions from URR.
- Enter “False,” “No,” or “N” in IsDelete field to add new records or to install edits to existing records.

Supplemental File Uploads, 3 of 3

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

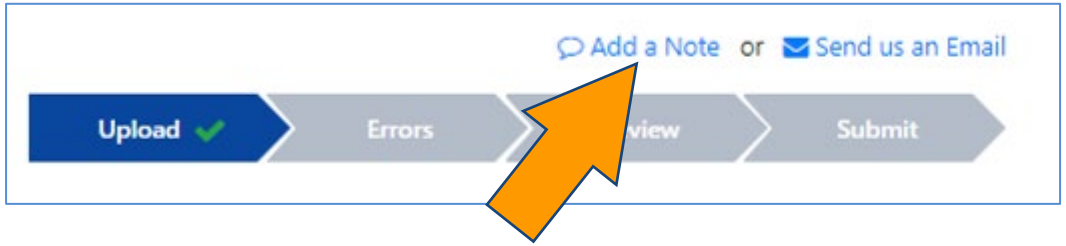


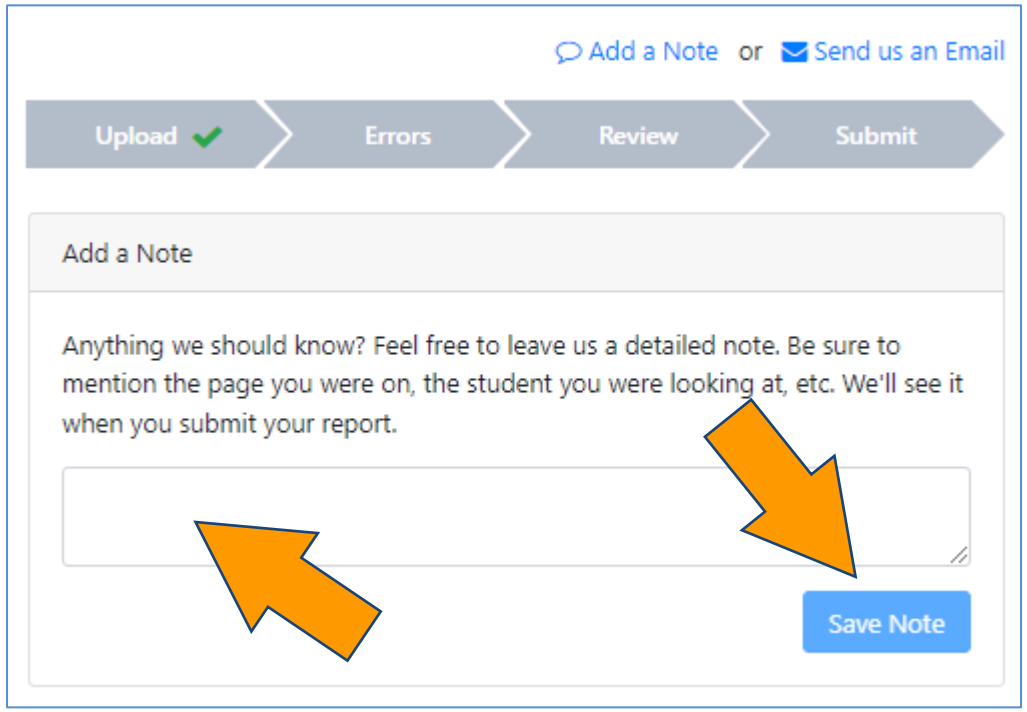




Add Notes to URR

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

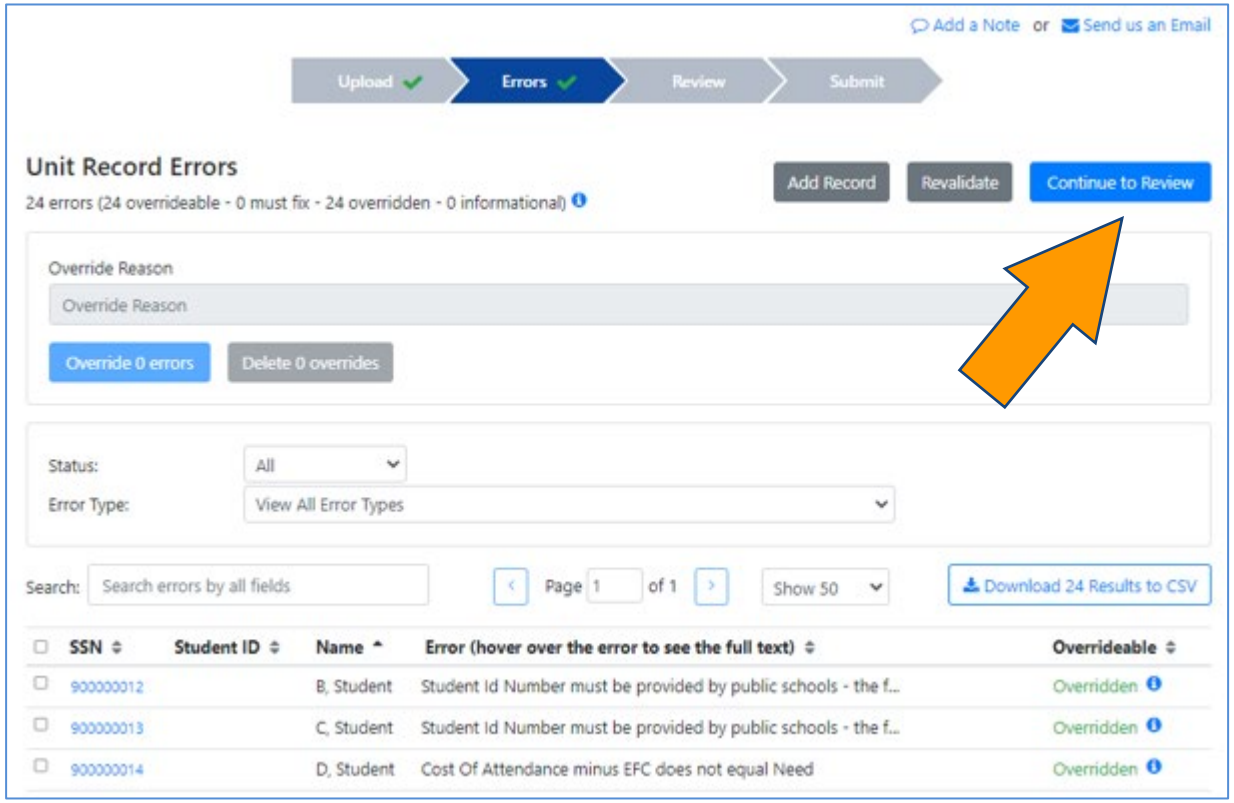




- Enter text and click "Save Note."
- Multiple Notes may be entered by different Users and retained in URR history.
- Notes are editable by the original writer.

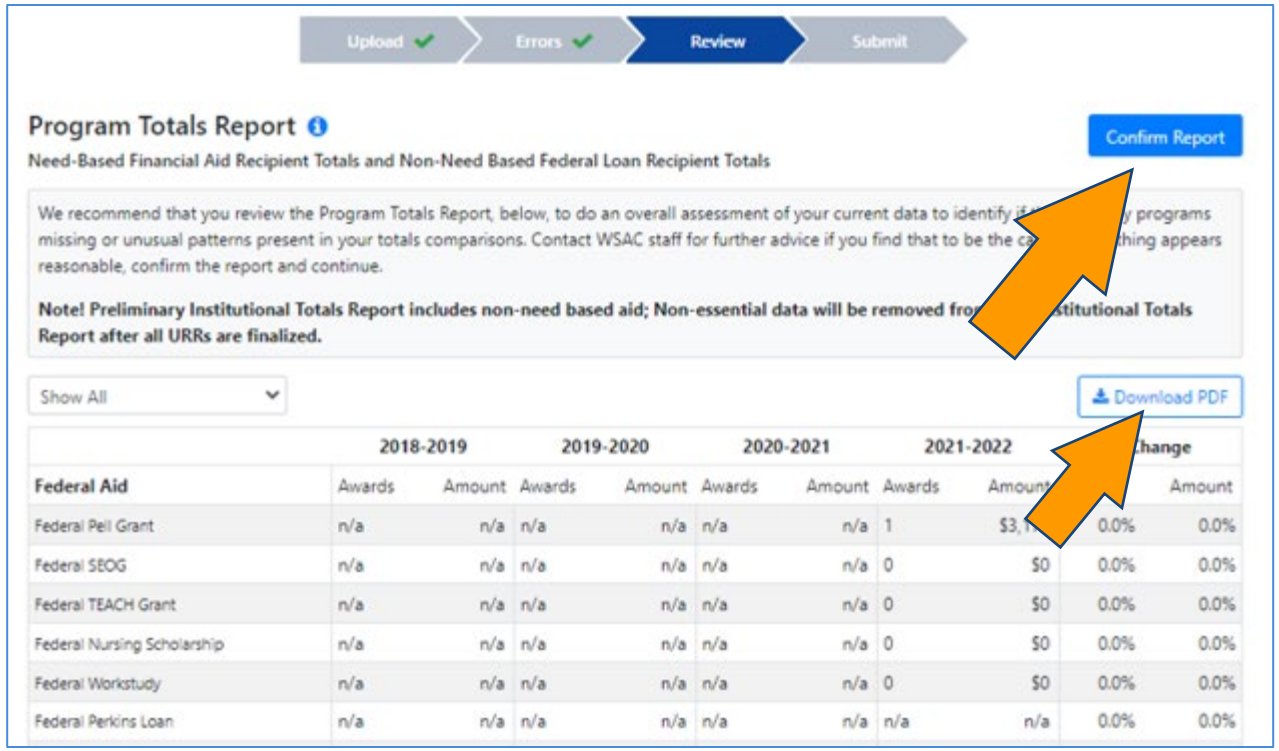
Review and Submit the URR, 1 of 6

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



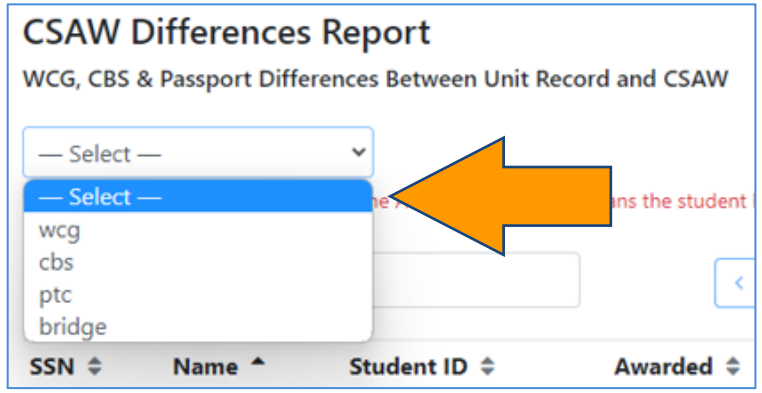
Review and Submit the URR, 2 of 6

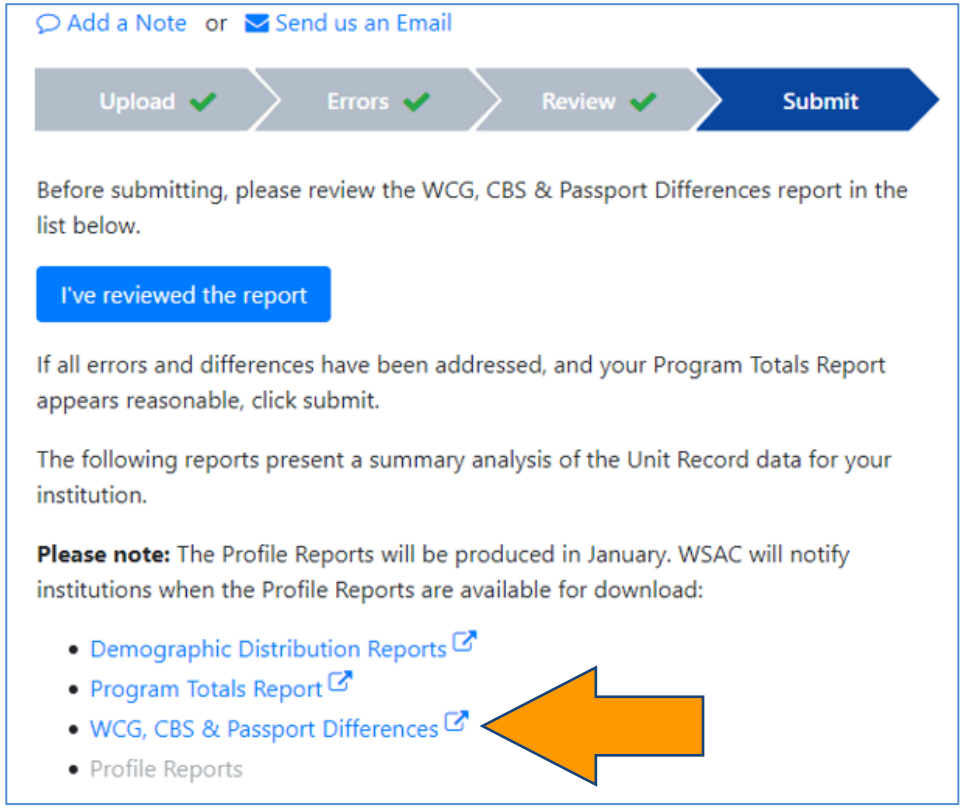
- Review the preliminary Program Totals Report to determine if any programs are missing or if unusual patterns appear in Totals comparisons.
- Contact WSAC to discuss if questions.
- Download PDF for comparison with January 2024 final.
- If all appears in order, click "Confirm Report."
- Then click "Continue to Submit" in next screen that appears.



Review and Submit the URR, 3 of 6

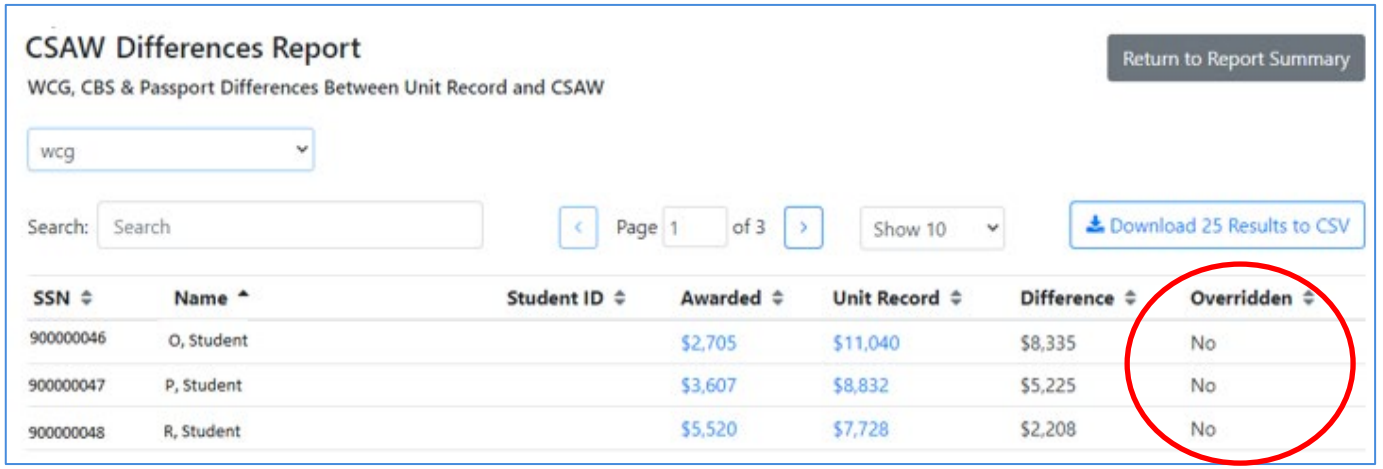
- Before Submit, WCG/CBS/PTC Differences Reports must be reviewed to ensure no unresolved differences remain.
- Each program is a separate report.
- Any differences must be addressed or accounted for.





Review and Submit the URR, 4 of 6

- Example of Differences Report for WCG



CSAW Differences Report

WCG, CBS & Passport Differences Between Unit Record and CSAW

Return to Report Summary

wcg

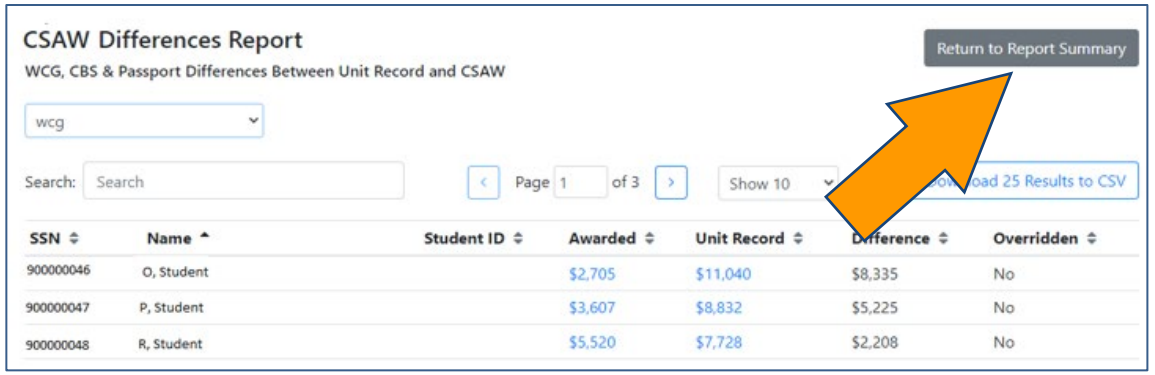
Search: Search ‹ Page 1 of 3 › Show 10 Download 25 Results to CSV

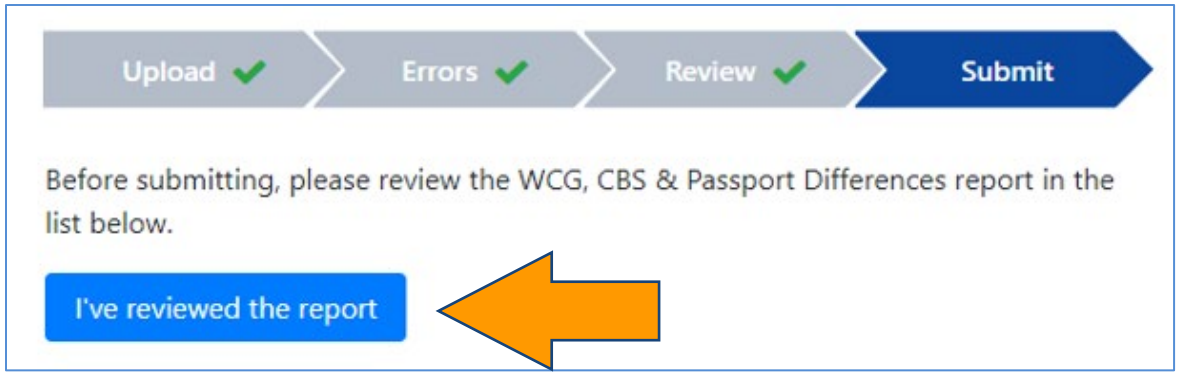
SSN	Name	Student ID	Awarded	Unit Record	Difference	Overridden
900000046	O, Student		$2,705	$11,040	$8,335	No
900000047	P, Student		$3,607	$8,832	$5,225	No
900000048	R, Student		$5,520	$7,728	$2,208	No

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

Review and Submit the URR, 5 of 6

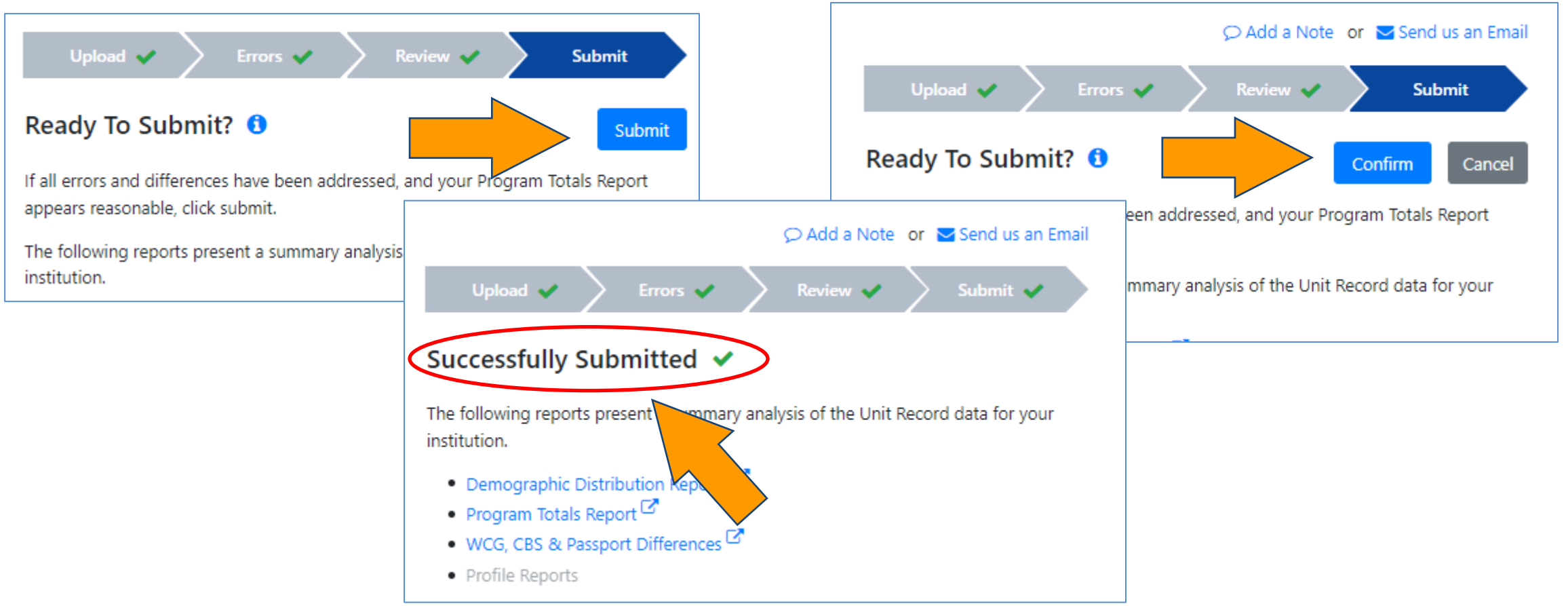
- If submitted with significant differences, WSAC staff reach out to resolve questions about the differences before the URR is finalized.
- After addressing Differences Reports review, click “Return to Report Summary” to return to Submit screen. Then, click “I have reviewed the report.”





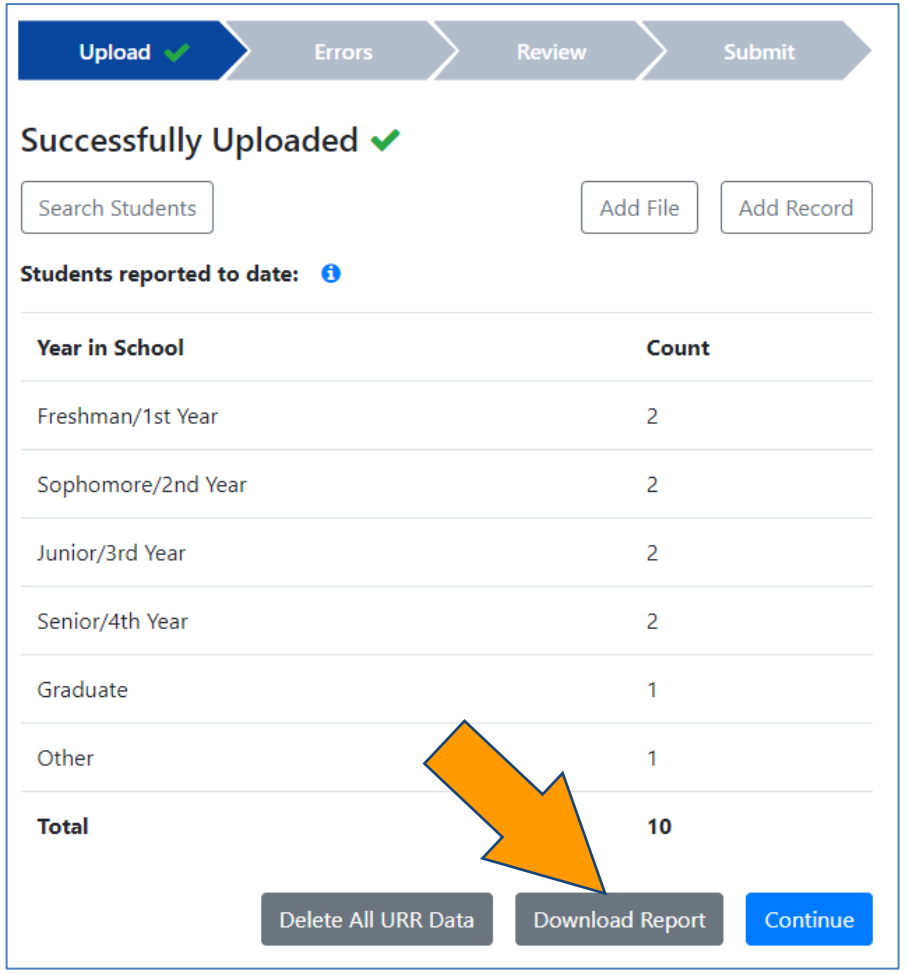
Review and Submit the URR, 6 of 6

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



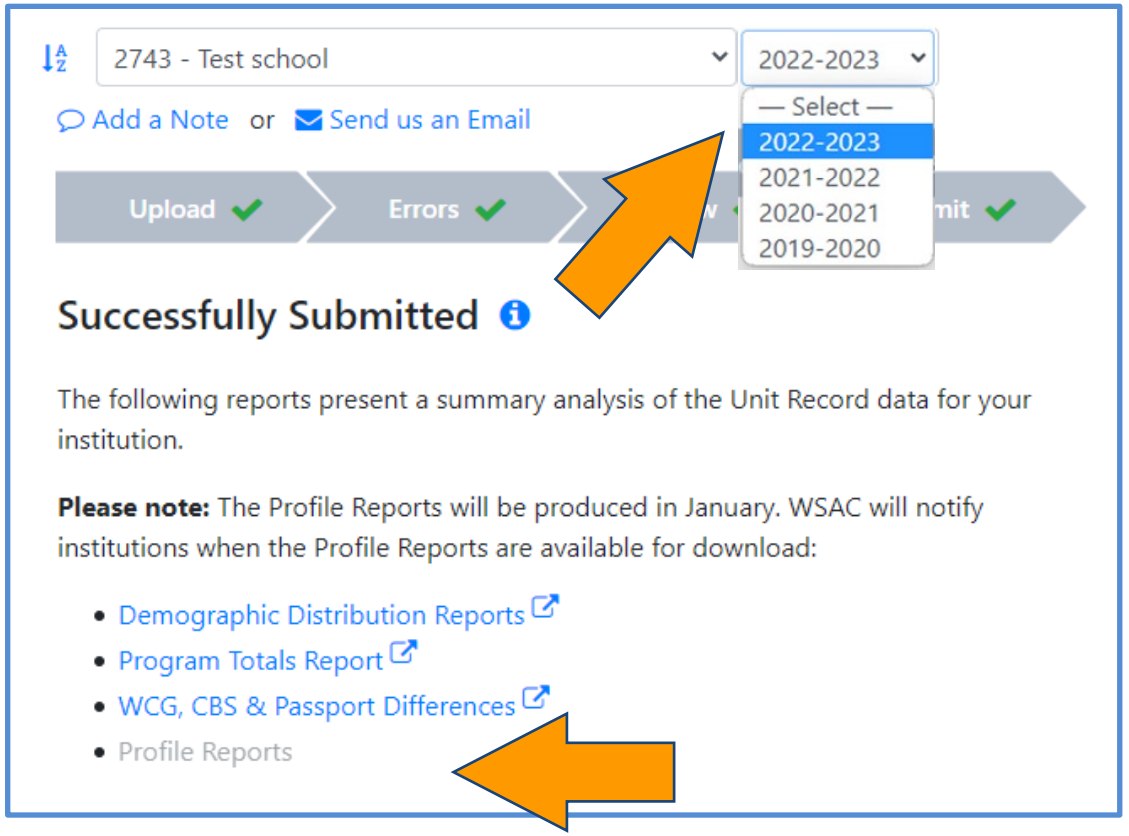
“Point-in-time” URR Data File Downloads

- Full “point-in-time” URR data file downloads are now located on the “Upload” screen instead of “Search” screen. (Search screen record download now is an abbreviated file.)
- Constitutes full URR file in the Portal, with all edits saved through the time downloaded.
- 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 available from the Submit screen immediately after submission include:
  - Demographic Distribution Reports
  - Program Totals Report
  - WCG, CBS & Passport Differences Reports
- Profile Reports available January 2024
  - Need-Based Aid Recipients
  - State Work Study Recipients
  - WA College Grant Recipients
  - College Bound Scholarship Recipients



Questions?

Where to go for help – ctcLink System

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

  http://ctclinkreferencecenter.ctclink.us/

- Contact FA ERP Support Team for questions or assistance with set up or running of the ctcLink Unit Record Report. File a ticket via the Service Desk at:

  https://servicedesk.sbctc.edu/helpdesk/WebObjects/Helpdesk.woa

Where to go for help – WSAC URR Portal Issues

- Review the 2022-23 URR Manual, available online at:

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

- Contact Washington Student Achievement Council staff at:

  unitrecord@wsac.wa.gov

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