



Unit Record Report 3.0

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

Training Webinar Presentation

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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.

- **State FA Reporting Component**

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

A screenshot of the ctcLink web application interface for State FA Reporting. The breadcrumb trail at the top reads "Financial Aid > CTC Custom > CTC Reports > State FA Reporting". Below this, the "Run Control ID" is "WA220_URR". There are links for "Report Manager" and "Process Monitor", and a prominent "Run" button. The main form area is titled "State FA Report" and contains four fields: "*Institution" with the value "WA220", "*Aid Year" with the value "2023", "File Path" with the value "/CSTRANSFER/WA220/WCG2023/", and "Report Type" which is a dropdown menu currently showing a blank space. At the bottom of the form are three buttons: "Save", "Add", and "Update/Display".

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

Run Control ID WA220_URR Report Manager Process Monitor Run

State FA Report

*Institution WA220

*Aid Year 2023

File Path /CSTRANSFER/WA220/WCG2023/

Report Type

Save Add Update/Display

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

Process Scheduler Request

User ID CTC_SCASINO Run Control ID WA220_URR

Server Name Run Date 06/30/2023

Recurrence Run Time 10:26:10AM

Time Zone 🔍

Process List

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

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



Programs to Report, 1 of 3

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

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

* **FAFSA or WASFA required**

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



Programs to Report, 2 of 3

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

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



Programs to Report, 3 of 3

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

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

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



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

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

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

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



Changes for the 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

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

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



Need Duration

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



Term Enrollment Status

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

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

- **Term Enrollment Status**

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



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.**

- **Edit Reports**

- Recommended that reports be reviewed and worked in order shown here to verify that set up and errors are addressed prior to reviewing data to be included in the URR extract file.

- **Report C (CTCFAURR_C)-Missing Item Type Report**

- This report will identify any FA Item Type that has been awarded to a student with an amount greater than zero and qualifies to be reported in the Unit Record Report extract file, but the item type does not exist in the Unit Record Report Config setup page.

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

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



Reminders

- Keep Override comment(s) brief, but with sufficient detail to directly explain the edit response.
- Report Family Income using WCG income calculation, not federal Total Income field from FAFSA without appropriate adjustments. Income reported in CSAW for 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).

- **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/>

WSAC Portal - Login

portal.wsac.wa.gov

WASHINGTON STUDENT ACHIEVEMENT COUNCIL
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the WashBoard.org

WA529 GET Dream Ahead

GEAR UP WASHINGTON STATE

College Bound Scholarship WASHINGTON

WASHINGTON OPPORTUNITY PATHWAYS



Portal URR Submission Tool

In the Programs menu, click on Unit Record.

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

WASHINGTON STUDENT ACHIEVEMENT COUNCIL
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Home ▾ | Admin ▾ | Common ▾ | Csaw ▾ | **Programs ▾**

Welcome to the WSAC portal.

This site contains confidential student information on financial aid applicants provided by Washington Student Achievement Council. This site is for use only by authorized WSAC staff, institution staff, employers, and students. This site is not for use by the general public.

By logging in to this tool, I acknowledge that the following terms include:

- Protecting WSAC data in accordance with the Family Educational Rights and Privacy Act (FERPA).
- Protecting user authentication information from use by unauthorized persons.
- Using WSAC data only for purposes of administering and assisting students with state financial aid programs.



Uploading Data from File, 1 of 2

- The Welcome/Upload screen will appear, with 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

Welcome to Unit Record 3.0!

Updates include:

- Faster uploads and error processing
- Bulk override capabilities
- A more modern look and feel
- A comparison chart between the Unit Record Report, the student's FAFSA/WASFA, and data reported in other applications (i.e. CSAW)

6160 - Test School 2022-2023

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

Upload Errors Review Submit

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

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

Download the template [here](#).

Choose File Browse

Start Upload Create Record Manually



Uploading Data from File, 2 of 2

Upload Errors Review Submit

Successfully Uploaded

Search Students Add File Add Record

Students reported to date:

Year in School	Count
Freshman/1st Year	2
Sophomore/2nd Year	2
Junior/3rd Year	2
Senior/4th Year	2
Graduate	1
Other	1
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 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

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

Details Terms On File Errors (2 errors) ← 4 tabs

Override Reason
Override Reason:
Override 0 errors Delete 0 overrides

Status: All
Error Type: View All

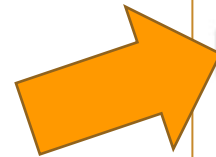
Search: Search errors by < Page 1 of 1 > Show 10 Download 2 Results to CSV

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



Editing Student Records – Detail tab, 2 of 7

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



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

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

Student Information

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

Ethnicity

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

ISIR WASFA & School Information

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

Need

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

Family Information

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



Editing Student Records – 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

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

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

☐ **Show All**
[Click to lock](#)

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

- 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 ℹ		\$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

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

Details Terms On File Errors (2 errors)

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

Override 1 errors Delete 0 overrides

Status: Error Type: Error Types

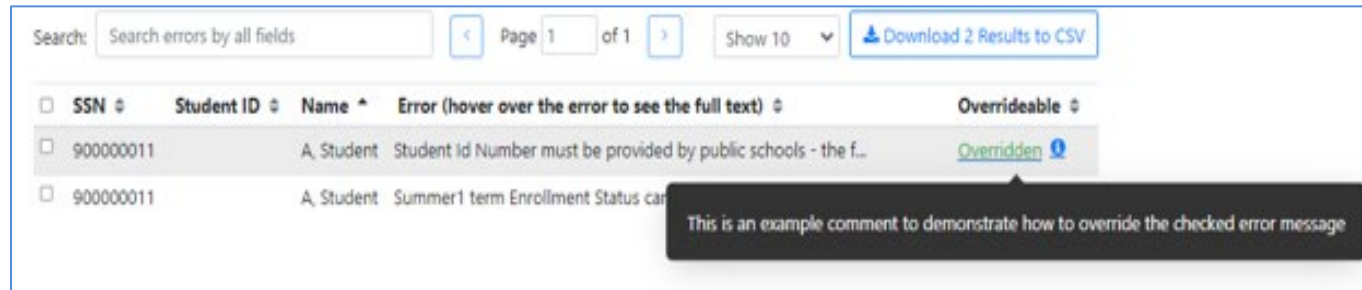
Search: errors by all fields Page 1 of 1 Show 10 Download to CSV

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

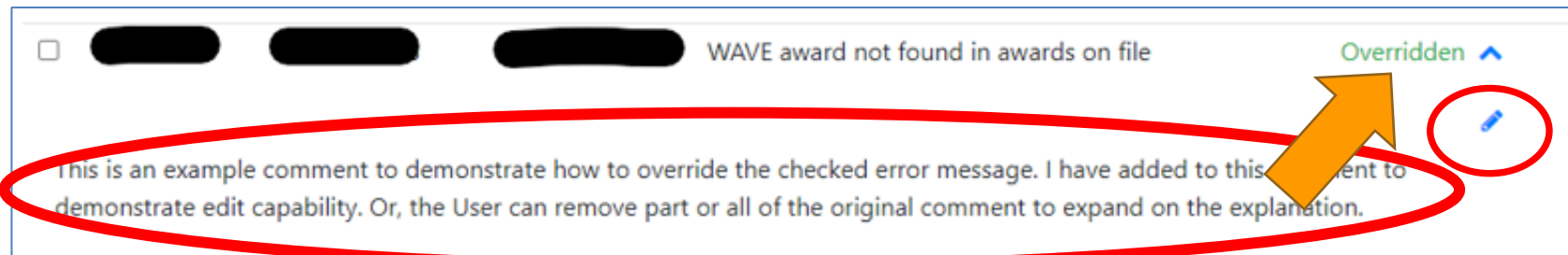


Editing Student Records, 6 of 7

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



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





Editing Student Records, 7 of 7

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

The screenshot shows the 'Override Reason' interface. At the top, there is a text input field labeled 'Override Reason'. Below it are two buttons: 'Override 0 errors' (blue) and 'Delete 1 overrides' (gray). Further down are dropdown menus for 'Status' (set to 'All') and 'Error Type' (set to 'View All Error Types'). A search bar is present with the text 'Search: Errors by all fields'. To the right of the search bar are navigation buttons for 'Page 1 of 1' and a 'Download 2 Results to CSV' button. Below these is a table with the following columns: 'Student ID', 'Name', 'Error (hover over the error to see the full text)', and 'Overrideable'. The table contains two rows. The first row is selected (checkbox checked) and shows '900000001', 'A, Student', and an error message: 'Student Id Number must be provided by public schools - the f...'. The 'Overrideable' column for this row shows 'Overridden' with a green pencil icon. The second row is not selected (checkbox unchecked) and shows '900000001', 'A, Student', and an error message: 'Summer1 term Enrollment Status cannot be Not Enrolled when S...'. The 'Overrideable' column for this row shows 'Overrideable' with a red pencil icon. Three orange arrows with black text are overlaid on the screenshot: one pointing to the first row's checkbox labeled 'select error', one pointing to the 'Delete 1 overrides' button labeled 'delete override', and one pointing to the 'Overridden' status with the pencil icon labeled 'select to edit'.

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



Resolving Social Security Number Differences

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



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



“Bulk” Override Processing, 1 of 2

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

Override Reason

Override Reason

Override 0 errors Delete 0 overrides

Status: All

Error Type: View All Error Types

Search: Search errors by all

Load 26 Results to CSV

<input type="checkbox"/>	SSN	Student	Overrideable
<input type="checkbox"/>	900000011		Overrideable
<input type="checkbox"/>	900000011		Overrideable
<input type="checkbox"/>	900000012	B, Student	Overrideable
<input type="checkbox"/>	900000013	C, Student	Overrideable

Need Amount cannot exceed Cost of Attendance
Total aid reported is zero
Cost Of Attendance minus EFC does not equal Need
Student Id Number must be provided by publics
Passport To College Amount Differs From CSAW
Summer1 term Enrollment Status cannot be Not Enrolled when Summer1 term aid has been reported
Passport recipient not independent
Student Id Number must be provided by public schools - the f...
Student Id Number must be provided by public schools - the f...



“Bulk” Override Processing, 2 of 2

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

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

Override 7 errors Delete 0 overrides

Status: All

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

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

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



Search for Existing URR Records for Edit, 1 of 2

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

Upload Errors Review Submit

Successfully Uploaded

Search Students Add File Add Record

Students reported to date:

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

This opens the Search screen, where you can:

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

Unit Record Search

Search: Search by comma-separated SSN List

Search: Search by any field

< Page 1 of 1 > Show 10 Download 1 Results to CSV

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



Search for Existing URR Records for Edit, 2 of 2

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

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

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

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



Manually Adding Student Records, 1 of 3

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

Unit Record Errors

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

Override Reason

Override Reason

Override 0 errors Delete 0 overrides

Status: All

Error Type: View All Error Types

Search: Search errors by all fields

Page 1 of 3

Show 10

Download 26 Results to CSV

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

Successfully Uploaded

Search Students

Add File Add Record

Students reported to date:

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

Discard Upload Download Report Continue



Manually Adding Student Records, 2 of 3

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

Add Unit Record

Details Terms

Student Information

First name

Middle name

Last name

SSN or WASFA Id

Date of birth

Gender

Is resident

Ethnicity

Hispanic origin

Asian

Black/african american

American indian alaska native

Native hawaiian/pacific islander

White

Other race

ISIR WASFA & School Information

Transaction number

Rejected

Student id

Year in school

Need

Family income

Duration (months)

COA

EFC

Need amount

Family Information

Family size

Number in college

Is dependent

Marital status

Save

Add Unit Record

Details Terms

☒ Show All [Click to lock](#)

Summer 1 Fall Winter Spring Summer 2 Total

Enrollment Status

Federal

Federal Pell Grant	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Federal SEOG	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Federal TEACH Grant	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Federal Nursing Scholarships	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Federal Work Study	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Federal Nursing Health Loans	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Federal Direct Subsidized Loans	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Federal Direct Unsubsidized Loans	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Federal Parent PLUS Loans	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Federal Grad PLUS Loans	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

State

Save



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.

The screenshot shows the 'Student O (900000018)' interface. The 'Errors (2 errors)' tab is highlighted with a red circle. Below the tabs, there is an 'Override Reason' section with a text input field and buttons for 'Override 0 errors' and 'Delete 0 overrides'. Below this, there are filters for 'Status' (set to 'All') and 'Error Type' (set to 'View All Error Types'). A search bar is present with the text 'Search errors by all fields'. Below the search bar, there is a table of errors.

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

Below the table, there is a section titled 'Unit Record Errors' with the text '24 errors (24 overrideable - 0 must fix - 24 overridden - 0 informational)'. To the right of this section, there is a progress bar with steps: 'Upload' (checked), 'Errors' (checked), 'Review', and 'Submit'. Below the progress bar, there are buttons for 'Add Record', 'Revalidate', and 'Continue to Review'. An orange arrow points to the 'Revalidate' button.



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

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

Details Terms On File Errors (Resolved)

Student Information

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

Ethnicity

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

ISIR WASFA & School Information

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

Need

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

Family Information

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

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

Details Terms On File Errors (Resolved)

Student Information

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

Ethnicity

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

ISIR WASFA & School Information

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

Need

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

Family Information

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




Supplemental File Uploads, 1 of 3

- Add or delete records or make changes to multiple records simultaneously.
- Mixed types of changes may be included in a single supplemental file.
- Must use a valid .csv header as top row of file and include complete student record information in each data row.
- If editing existing records, 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.

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

Add a Note or Send us an Email

Upload Errors Review Submit

Add New File

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

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

Download the template [here](#)

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

Cancel Start Upload

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

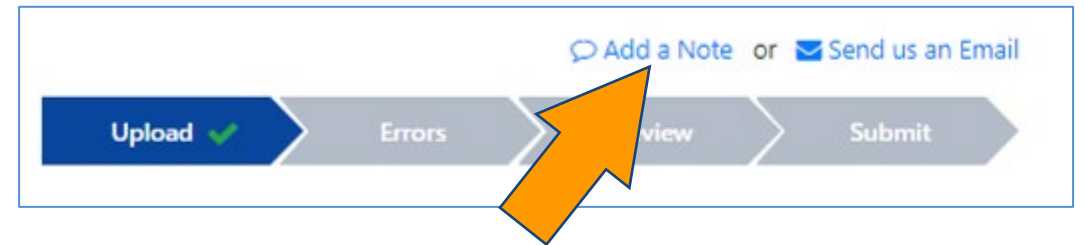
Delete All URR Data Download Report Continue



Add Notes to URR

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

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



- 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.”

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

Upload Errors Review Submit

Unit Record Errors

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

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

Override Reason

Override Reason

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

Status:

Error Type:

Search: [<](#) Page 1 of 1 [>](#) Show 50 [Download 24 Results to CSV](#)

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



Review and Submit the URR, 2 of 6

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

Upload ✓ Errors ✓ Review Submit

Program Totals Report ⓘ

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

We recommend that you review the Program Totals Report, below, to do an overall assessment of your current data to identify if any programs are missing or unusual patterns present in your totals comparisons. Contact WSAC staff for further advice if you find that to be the case. If everything appears reasonable, confirm the report and continue.

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

Show All ▼

Download PDF

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



Review and Submit the URR, 3 of 6

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

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

— Select —
— Select —
wgc
cbs
ptc
bridge

SSN Name Student ID Awarded

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

Upload ✓ Errors ✓ Review ✓ Submit

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

[I've reviewed the report](#)

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

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

Please note: The Profile Reports will be produced in January. WSAC will notify institutions when the Profile Reports are available for download:

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



Review and Submit the URR, 4 of 6

- Example of Differences Report for WCG

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

Return to Report Summary

wcg

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

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

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



Review and Submit the URR, 5 of 6

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

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

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

[Return to Report Summary](#)

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

Upload ✓ Errors ✓ Review ✓ **Submit**

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

[I've reviewed the report](#)



Review and Submit the URR, 6 of 6

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

The first screenshot shows a progress bar with 'Upload', 'Errors', and 'Review' steps marked with green checkmarks, followed by a 'Submit' button. Below the progress bar, it says 'Ready To Submit?' with an information icon. A text block explains that if all errors are addressed, the user should click submit. Another text block mentions that the following reports present a summary analysis of the institution's data. An orange arrow points from the 'Submit' button to the second screenshot.

The second screenshot shows the same progress bar, but the 'Submit' button is now a 'Confirm' button. It also has a 'Cancel' button. An orange arrow points from the 'Confirm' button to the third screenshot.

The third screenshot shows the 'Successfully Submitted' confirmation screen. The text 'Successfully Submitted' is circled in red. Below it, it says 'The following reports present a summary analysis of the Unit Record data for your institution.' and lists four reports: 'Demographic Distribution Reports', 'Program Totals Report', 'WCG, CBS & Passport Differences', and 'Profile Reports'. An orange arrow points from the 'Confirm' button in the second screenshot to the 'Successfully Submitted' text in this screenshot.



“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.

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





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

2743 - Test school

2022-2023

— Select —

2022-2023

2021-2022

2020-2021

2019-2020

Upload ✓ Errors ✓ Submit ✓

Successfully Submitted ⓘ

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

Please note: The Profile Reports will be produced in January. WSAC will notify institutions when the Profile Reports are available for download:

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

Questions?



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

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