



Financial Aid Administrator Guide

A quick start for reviewing your institution's WASFA applications

For **institution financial-aid administrators**

22 September 2026 • v0.2 • 2027–28 cycle

Washington Student Achievement Council • prepared by Concourse

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1 What your role can do

You work the WASFA applications of students who selected **your institution**. Everything in the portal is scoped to that school: the counts on your overview, the applications you can open, and the drafts you can chase.

Your work in the portal

Task	Where
Find and read an application at your institution	Applications (§5, §6)
Correct application data, including a professional judgment, and record why	A record › Actions › Make a correction (§8)
Grant or cancel a dependency override, or set the incarcerated flag	A record › Actions (§9)
Add a note for your institution and WSAC	A record › Flags & notes (§7)
See which of your students have stalled in draft	In draft (§10)
Run, build, and save reports for your institution	Reports (§11)

TWO KINDS OF FAA ACCOUNT

An **FAA Editor** can do everything above. An **FAA Viewer** sees exactly the same records and changes none of them: no Actions menu and no notes. If a control this guide describes is not on your screen, you are on a Viewer account, and a WSAC Administrator can change that.

2 Signing in

Financial-aid administrators sign in through **WA.gov**, the same SecureAccess Washington identity service used elsewhere in state services. The portal never holds your password.

- 1 Go to the staff portal.** Use the address WSAC circulated. It is a different address from the public WASFA site your students use.
- 2 Enter your Work email** and choose **Continue**. The portal sends you to WA.gov from the address you typed.
- 3 Complete WA.gov sign-in and its multi-factor prompt.** Use the WA.gov account registered to the same email WSAC invited. You land on your overview.

ACCESS

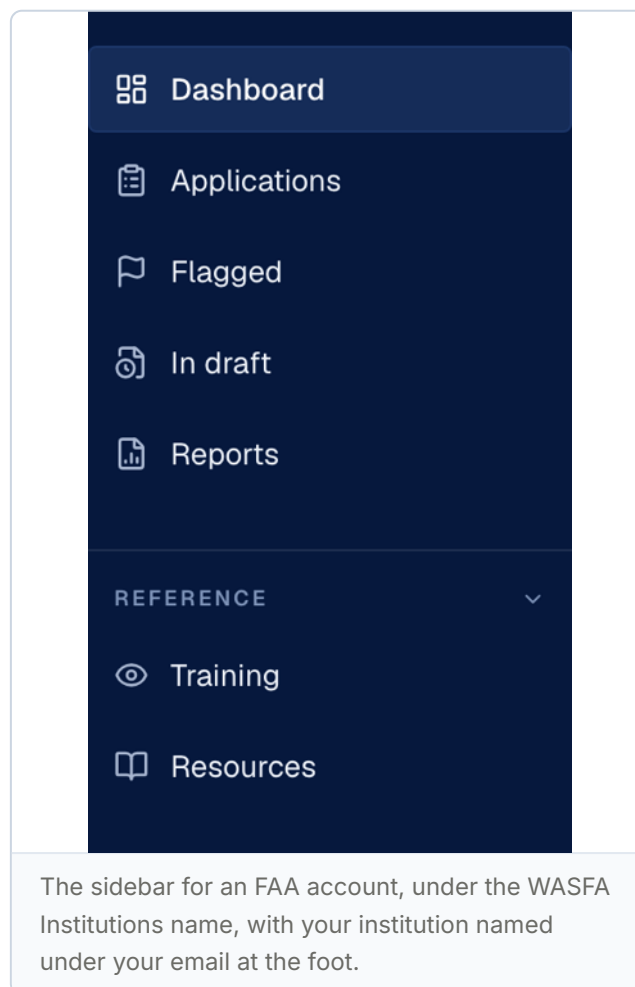
A WA.gov account is not by itself enough. A WSAC Administrator provisions your access and attaches it to your institution, and that attachment is what decides which applications you see. If the portal says it couldn't find a staff account for your email, or sign-in succeeds but the portal refuses you, that is the missing piece, not a password problem: contact your WSAC administrator.

SESSIONS

Closing the browser ends the session, and an idle session times out. Signing back in takes seconds and loses nothing, because the portal saves as you work.

3 Finding your way around

Everything lives in the left sidebar.

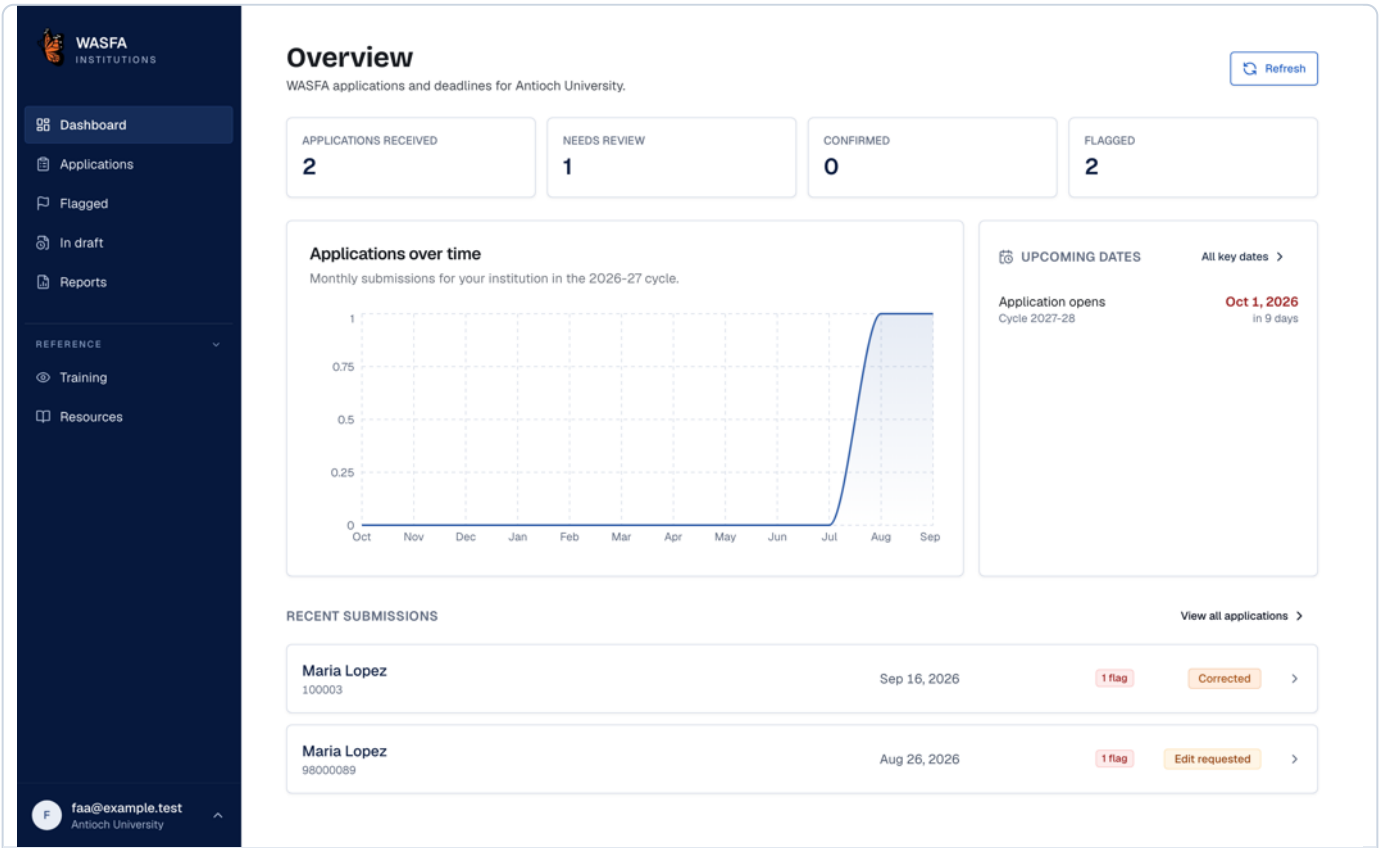


Your sidebar, top to bottom

Item	What it is for
Dashboard	Your institution's overview: counts, a monthly chart, deadlines, and recent submissions.
Applications	Every application at your institution, with filters.
Flagged	Your applications that a review rule raised a signal on.
In draft	Applications started but not yet submitted for your school.
Reports	Standard and ad-hoc reports, scoped to your institution.
Reference	Training and Resources.

4 Reading your overview

The Dashboard opens on **Overview**: your institution's WASFA position in one page, with counts across the top.



The overview. The line under the heading names your institution, and every number on the page is your school's.

- **The four tiles:** Applications received, Needs review, Confirmed, and Flagged.
- **Applications over time** plots your institution's submissions by month in the current cycle.

- **Upcoming dates** shows the next milestones in the cycle calendar and how long you have. **All key dates** opens the full calendar in Resources.
- **Recent submissions** is the newest applications naming your school, with their flags and status. **View all applications** opens the full list.

MORE THAN ONE INSTITUTION

If your account covers several schools, a picker beside **Refresh** switches the overview between them.

5 Finding an application

WHERE: APPLICATIONS

Start from the WASFA ID if you have it. It is the fastest, least ambiguous way in. Otherwise filter down.

- 1 **Open Applications** from the sidebar.
- 2 **Search** by name, WASFA ID, or transaction number.
- 3 **Narrow with Filters** if the search is broad: cycle; flag reason and retention bucket; status, disposition, and FAA confirmation; submission and last-modified dates; and applicant answers (dependency status, marital status, residency affidavit, public benefits, unaccompanied homeless youth, high school).
- 4 **Open the record** by selecting its row.

Dashboard

Applications

Flagged

In draft

Reports

REFERENCE

Training

Resources

faa@example.test

Antioch University

Applications

Search your institution's applications by name, WASFA ID, or transaction #.

Filters

Export results

Showing 2

Applicant	WASFA ID	Cycle	Submitted	Status	Last modified	Last modified by	Edits
Lopez, Maria	100003	2026-27	2026-09-16	Corrected	2026-09-22	Institution	4
Lopez, Maria	98000089	2026-27	2026-08-26	Edit requested	2026-08-26	Applicant	0

Showing 1-2 of 2

Page 1 of 1

Applications at your institution. A student who named several schools appears in each school's list.

Export results takes the current result set out as a file. Read §11 before you use it.

SCOPE

This list is every application where a student selected your institution, and nothing else. You cannot see another school's applicants, and another school's FAA cannot see yours, even for a student you share.

6 Reading a record

WHERE: APPLICATIONS > A RECORD

A record opens on the **Form** tab. The applicant's name, status, and transaction number sit at the top; the **Actions** menu sits top right; and a **Record** panel runs down the right-hand side with the WASFA ID, transaction, cycle, status, and a timeline of submitted, last modified, last modified by, and number of submissions.

The screenshot shows the WASFA Institutions application record page for Maria Lopez. The page is divided into a left sidebar, a main content area, and a right-hand record panel.

Left Sidebar:

- WASFA INSTITUTIONS logo
- Dashboard
- Applications (selected)
- Flagged
- In draft
- Reports
- REFERENCE (dropdown)
- Training
- Resources
- Footer: faa@example.test, Antioch University

Main Content Area:

Applications > WASFA 100003 · 2026-27

Maria Lopez Corrected

Transaction #54

Form | Flags & notes 1 | History

About the Student

FIRST NAME	Maria
MIDDLE NAME	T
LAST NAME	Lopez
SUFFIX	Jr.
DATE OF BIRTH	01/15/2005
THE STUDENT HAS A(N):	Social Security Number (SSN)
SOCIAL SECURITY NUMBER	***-**-1120
PHONE NUMBER	2065550142
EMAIL ADDRESS	sample@example.test
STATE (MAILING)	Washington
ZIP CODE	98501
MARITAL STATUS	Single (never married)
HIGH SCHOOL COMPLETION STATUS WHEN THE STUDENT BEGINS THE 2026-27 SCHOOL YEAR	High school diploma
STATE OF RESIDENCE	Washington
MONTH AND YEAR THE STUDENT BECAME A FULL-TIME RESIDENT OF THIS STATE	06/2027
GENDER	Male

Right-hand Record Panel:

RECORD

WASFA ID	100003
TRANSACTION	#54
CYCLE	2026-27
STATUS	Corrected
TIMELINE	
SUBMITTED	Sep 16, 2026 11:27 AM
LAST MODIFIED	Sep 21, 2026 6:16 PM
LAST MODIFIED BY	Institution
SUBMISSIONS	1

Actions (dropdown menu)

An application record. Form is the default tab; the Record panel on the right is always visible.

The three tabs

Tab	What is there
Form (default)	Every answer the applicant gave, section by section, as submitted.
Flags & notes	Open signals on this application, and the note thread.
History	Version history and the activity trail.

A banner above the tabs reads **Requesting a dependency override** when a dependent student has said unusual circumstances prevent them from providing parent information, and **Incarcerated applicant** once that flag is set. Both are covered in [§9](#).

Social Security and ITIN numbers

Identifiers are **masked** everywhere they appear: you see the last four digits.

Versions and transactions

An application is not overwritten when it changes. Each submission, resubmission, and correction creates a new **transaction**, and the History tab lists them in order. Your correction becomes the next transaction and reaches WSAC in the next daily file, not the moment you save. Submissions in the Record panel counts only the versions the student or a co-signer sent, not corrections.

Initial submission → Your correction → **Included in the next daily file**

7 Flags on your applications

WHERE: FLAGGED

A flag means a WSAC review rule noticed something worth a human look on one of your students' applications. It does not reject the application and it does not block the student.



Dashboard

Applications

Flagged

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Antioch University

Flagged

Your institution's applications with an active flag. Open a record to see details and make a correction.

Export results

Showing 2 of 2

WASFA ID	Applicant	Status	Flags
100003	Maria Lopez	Corrected	1
9800089	Maria Lopez	Edit Requested	1

Your institution's applications with an active flag. Open a record to see the details.

Search by WASFA ID or applicant, and use **Export results** to take the list out as a file. Open a row to read the flag on the record's **Flags & notes** tab.

VERDICTS ARE WSAC'S

You can see a flag and what raised it. Dismissing or confirming one is a WSAC-side determination. What you can do is act on the record: correct it, or add a note explaining what you found.

Adding a note

Notes are how you leave context for the next person: a phone call, a document seen, a decision's reasoning. Open **Flags & notes** on the record, type into Add a note to the thread, and choose **Post note**.

BEFORE YOU POST

A note cannot be edited or removed once posted, so read it back first. Your notes can be seen by anyone at your institution and by WSAC staff.

DO NOT

Repeat a fraud-related flag reason to a student, in an email or on a call. Flags are invisible to applicants by design. If a flag needs student contact, ask WSAC how to word it.

8 Correcting a record yourself

WHERE: APPLICATIONS > A RECORD > ACTIONS > MAKE A CORRECTION

Use this when you already know what the right answer is, typically from a conversation with the student, and for a professional judgment. It creates a new transaction, which goes to WSAC in the next daily file.

The editor walks the whole application. The banner names the student and the transaction you are correcting.

- 1 **Open the record** and choose **Actions > Make a correction**. The **Edit application** page opens.
- 2 **Work through the sections** using the progress list on the left. You can jump straight to the section you need; the others stay as they are.
- 3 **Open Review changes** when you are done. It lists exactly what you altered and names the transaction number the correction will be committed as.
- 4 **Choose the Correction reason**. It is required:
 - **General correction**: every college on the student's list will see this transaction.
 - **Professional judgment**: only your institution and WSAC will see it.The line under the reason says which, and changes with your choice.
- 5 **Add details if they help** (optional). They are recorded on the audit trail.

- 6 **Tick the confirmation** that the changes listed are correct, then choose **Submit correction**. The new transaction appears on the History tab.

Applications > WASFA 100003 · 2026-27 > Edit

Edit application

Edit the application; a summary of changes is confirmed before anything commits.

⚠ You are correcting the submitted application for Maria Lopez (currently transaction #54). Nothing is saved until you review your changes and submit — leaving this page discards them.

PROGRESS

- ✓ About the Student
- ✓ High school
- ✓ Student college or career school plans
- ✓ Student Personal Circumstances
- ✓ Student Homelessness
- ✓ Student family information
- ✓ Student financial information
- ✓ WA residency affidavit (additional questions)
- 1 item changed**

Review changes

Confirm exactly what you changed before this correction is committed as transaction #55.

1 item changed

ABOUT THE STUDENT

Middle name

T → Q

Correction reason *

A professional judgment is visible only to your institution and WSAC. A general correction goes to every college on the student's list.

Select a reason

Details (optional)

What prompted this correction? This is recorded on the audit trail.

e.g. Applicant called to correct a date-of-birth typo.

☐ I confirm the change listed above are correct.

[← Back](#) [Cancel](#) [Submit correction](#)

Review changes. Pick the correction reason before you submit; nothing is committed until you do.

BEFORE YOU LEAVE THE PAGE

Nothing is saved until you submit at Review changes. Leaving the editor discards every change you have made.

NOTE

Your correction sends no message to the student and does not send anyone back to sign again. If they should know, tell them. Your edit does not need WSAC's review first. Other colleges never see the details you type.

UNDOING A PROFESSIONAL JUDGMENT

There is no cancel for a professional judgment. To reverse one, record another professional judgment that puts the values back.

9 Recording an override or the incarcerated flag

WHERE: APPLICATIONS > A RECORD > ACTIONS

The Actions menu also records two decisions your institution makes about a student. Each creates a new transaction, and the student is not notified.

Dashboard

Applications

Flagged

In draft

Reports

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faa@example.test
Antioch University

Applications > WASFA 100003 - 2026-27

Maria Lopez

Corrected

Transaction #54

Form

Flags & notes

History

About the Student

FIRST NAME	Maria
MIDDLE NAME	T
LAST NAME	Lopez
SUFFIX	Jr.
DATE OF BIRTH	01/15/2005
THE STUDENT HAS A(N):	Social Security Number (SSN)
SOCIAL SECURITY NUMBER	***-**-1120
PHONE NUMBER	2065550142
EMAIL ADDRESS	sample@example.test
STATE (MAILING)	Washington
ZIP CODE	98501
MARITAL STATUS	Single (never married)
HIGH SCHOOL COMPLETION STATUS WHEN THE STUDENT BEGINS THE 2026-27 SCHOOL YEAR	High school diploma
STATE OF RESIDENCE	Washington
MONTH AND YEAR THE STUDENT BECAME A FULL-TIME RESIDENT OF THIS STATE	06/2027
GENDER	Male

Actions

Make a correction

Cancel dependency override

Set incarcerated flag

RECORD

WASFA ID

TRANSACTION

CYCLE

STATUS

TIMELINE

SUBMITTED

LAST MODIFIED

LAST MODIFIED BY

SUBMISSIONS

#54

2026-27

Corrected

Sep 16, 2026
11:27 AM

Sep 21, 2026
6:16 PM

Institution

1

The Actions menu. The items after Make a correction change with the record.

What the Actions menu can hold

Item	When it appears	Who sees the result
Grant dependency override	The student is dependent and has said unusual circumstances prevent them from providing parent information. The record shows Requesting a dependency override.	Only your institution and WSAC
Cancel dependency override	Your institution has granted an override on this record.	Only your institution and WSAC

Item	When it appears	Who sees the result
Set incarcerated flag / Remove incarcerated flag	Always; the label follows the current state.	Every college on the student's list

- 1 **Open the record** and choose **Actions**, then the item.
- 2 **Read the confirmation.** It says who will see the new transaction and that the student is not notified. An override takes an optional note; the incarcerated flag does not.
- 3 **Confirm** with **Grant override**, **Cancel override**, **Set flag**, or **Remove flag**.

NOTE

A denial is not recorded in the portal. If you decide not to grant an override, handle that through your institution's own process.

10 Chasing a stalled draft

WHERE: IN DRAFT

Applications started but not yet submitted for your school. Use this queue to reach out before a deadline passes.



Dashboard

Applications

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faa@example.test

Antioch University

In draft

Applications started but not yet submitted for your school.

Search name, email, or WASFA ID

All cycles

Export results

Showing 2 of 2

Applicant	Cycle	Sections	Last section viewed	Last edited
Maria Lopez sample@example.test	2026-27	4/9 complete	About the Student	Aug 26, 2026
Maria Lopez sample@example.test	2026-27	7/8 complete	WA residency affidavit (additional questions)	Aug 21, 2026

In-draft applications: how far each student got, and when they last touched it.

You see who started, how far they got, the last section they viewed, and when they last edited, with their name and email. Search by name, email, or WASFA ID, or filter to one cycle. That is enough to prioritise a call.

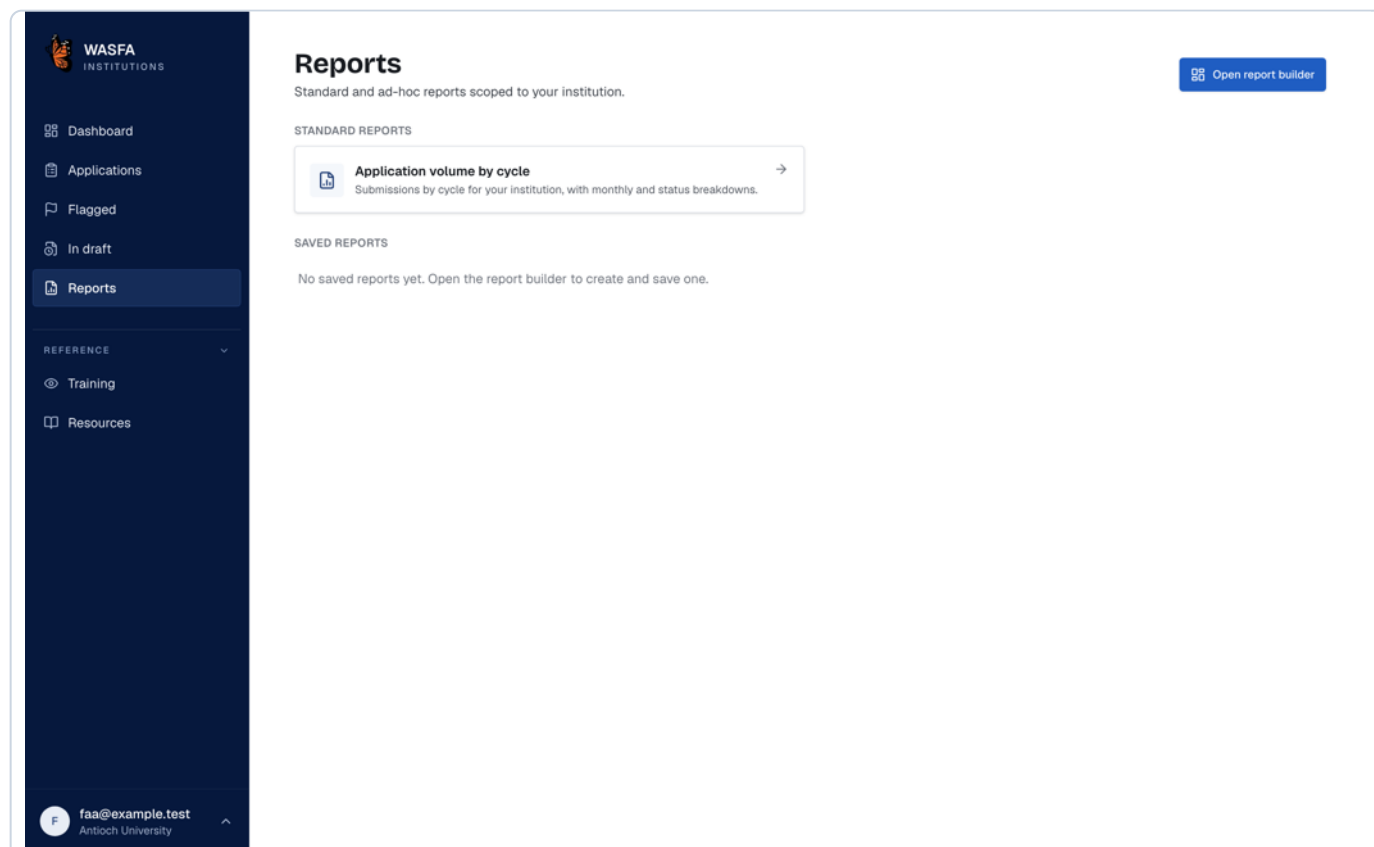
NOTE

In-draft records show who started, their name and email, but never their draft answers. An unsubmitted application has not been shared with anyone yet. Sort by Last edited to find the students who stalled longest ago, and **Export results** if you are working a call list offline.

11 Reports

WHERE: REPORTS

Standard and ad-hoc reports, scoped to your institution.



The Reports catalogue for your institution. Saved reports appear under the standard one.

- 1 **Start with Application volume by cycle:** submissions by cycle for your institution, with monthly and status breakdowns. **Export CSV** takes it out as a file.
- 2 **Otherwise choose Open report builder,** pick a dataset, and place fields into Rows, Columns, Values, and Filters.

- 3 **Choose Save report** if you will want it again. Tick Share with this institution to make it available to your colleagues; otherwise it stays private.
- 4 **Use Export** (CSV or Print) when you need the rows outside the portal.

HANDLE WITH CARE

Anything you export carries no masking, no access control, and no audit trail once it is on your machine. Export only what you need, keep it where your institution's policy requires, and delete it when the task is done.

12 Seeing what the applicant sees

WHERE: REFERENCE > TRAINING

Training opens the practice site: the applicant experience with demo students, at any point in the application. Use it to answer "what does the student actually see at this step?" before you answer it on a call. The page also carries the Student, Parent, and Spouse guides, to download and send to a family.

The guides to hand to families come first; each scenario card below is one student at one point in the process.

- 1 **Pick the scenario that matches the situation.** Under Student scenarios: New application, Draft application, Submitted, and Awaiting signatures. Under Co-signer scenarios: Guardian signature, Spouse signature, Guardian — submitted, and Spouse — submitted.
- 2 **Choose Open scenario.** The practice site opens in a new tab.

3 Choose **Restart this scenario** in the practice site's header when you want a clean start.

NOTE

These are demo applications, not real applicants. Nothing you do in Training changes a real application or reaches WSAC, so click freely: this is the one place in the portal where you cannot break anything.

CO-SIGNERS

The co-signer scenarios show a parent's or spouse's side, before and after the student submits. Those are the ones to open when a family calls about a signature they cannot find.

13 Getting help

WHERE: REFERENCE > RESOURCES

- **Key dates:** when each cycle's application opens and closes, and when corrections close.
- **Guides and training:** this guide, and the PEP supplement where your account has it, to download.
- **Frequently asked questions:** what you can see, reviewing and editing a record, flags, and entering an application for a student.
- **More help:** **Start the tour** for a guided tour of the portal, and how to get support.
- **Training,** its own item under Reference: the student's view, covered in §12.



Dashboard

Applications

Flagged

In draft

Reports

REFERENCE

Training

Resources

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faa@example.test

Antioch University

Resources

Key dates, guides, and help.

Key dates

Application opens for 2027-28 in 9 days — Oct 1, 2026.

CURRENT CYCLE

2026-27

Active

Application opens

Oct 1, 2025

Application closes

Jun 30, 2027

in 281 days

Corrections close

Aug 31, 2027

in 343 days

NEXT CYCLE

2027-28

Upcoming

Application opens

Oct 1, 2026

in 9 days

Application closes

Jun 30, 2028

in 647 days

Corrections close

Jun 30, 2028

in 647 days

2028-29

Upcoming

Application opens

Oct 1, 2027

in 374 days

Application closes

Jun 30, 2029

in 1012 days

Corrections close

Not scheduled

Guides and training

Financial Aid Administrator Guide

For institution FAAs: reviewing and correcting your own institution's applications, notes, in-draft follow-up, and reports.

Download

Frequently asked questions

What you can see

Which applications appear in your queue

Working at more than one institution

What you won't see

Resources: key dates per cycle, then guides and training, then frequently asked questions.

Reporting a problem

The **Feedback** button sits in the lower-right corner of every page. Raise it from the page where the problem happened and the page and your role are attached automatically.

For access changes, a colleague who needs an account, or anything about how the program is configured, contact WSAC.

ENTERING APPLICATIONS ON A STUDENT'S BEHALF

If your institution runs a Prison Education Program, your account can be granted the ability to enter applications for students who cannot reach the portal. That adds **New application** to your sidebar and is covered in a separate supplement to this guide. Ask WSAC if you need it and do not have it.