



# WSAC Portal

## Reconciliation Tools in the Portal



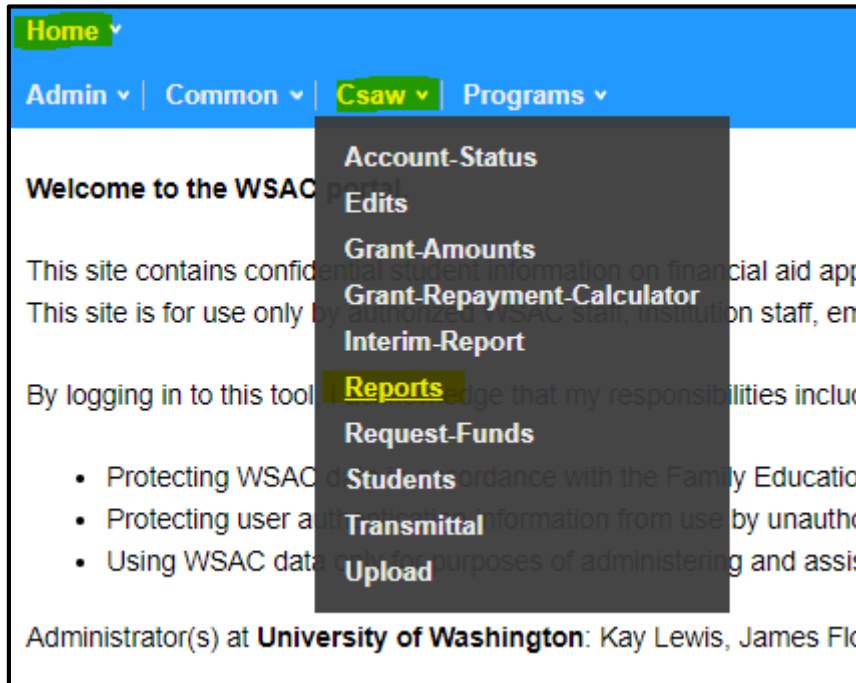


# Reconciliation Tools in the Portal

- Institutions are required to enter Washington College Grant (WCG), College Bound Scholars (CBS) and Passport To Careers (PTC) awards into the Portal.
  - Important to have accurate and timely information
  - Performs eligibility checks on student data and awards.
- Data used for program evaluation, to forecast funding costs, and to inform the legislature of program progress.
- WSAC provides Reports that can be used to help easily identify potential problems and manage your data

# Reports

- This page is full of resources for you!
- Located in Portal: Home → CSAW → Reports



The screenshot shows the top navigation bar of the WSAC portal. The 'Home' menu item is highlighted in green. Below it, the 'Admin', 'Common', 'Csaw', and 'Programs' menus are visible. The 'Csaw' menu is expanded, showing a list of options: Account-Status, Edits, Grant-Amounts, Grant-Repayment-Calculator, Interim-Report, Reports (highlighted in green), Request-Funds, Students, Transmittal, and Upload. The main content area below the navigation bar contains a welcome message and a list of responsibilities.

Home ▾ | Admin ▾ | Common ▾ | **Csaw ▾** | Programs ▾

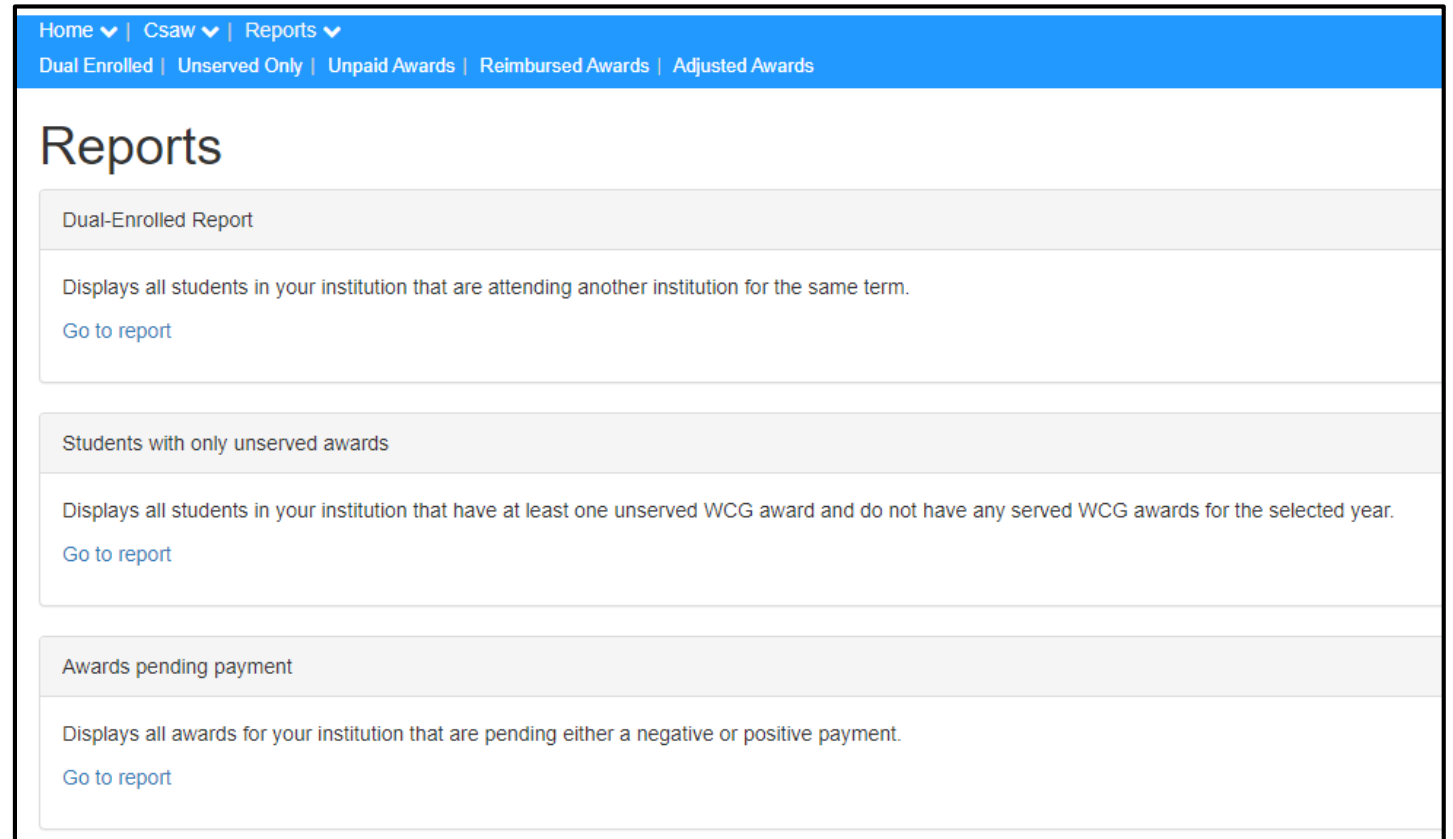
**Welcome to the WSAC**

This site contains confidential student information on financial aid applications. This site is for use only by WSAC staff, institution staff, and authorized personnel.

By logging in to this tool, you agree that my responsibilities include:

- Protecting WSAC data
- Protecting user and institution information from use by unauthorized personnel
- Using WSAC data for the purposes of administering and assisting with the financial aid process

Administrator(s) at **University of Washington**: Kay Lewis, James Fick



The screenshot shows the 'Reports' page in the WSAC portal. The navigation bar at the top includes 'Home', 'Csaw', and 'Reports' (highlighted in blue). Below the navigation bar, there are three report categories, each with a description and a 'Go to report' link.

Home ▾ | Csaw ▾ | **Reports ▾**

Dual Enrolled | Unserved Only | Unpaid Awards | Reimbursed Awards | Adjusted Awards

## Reports

**Dual-Enrolled Report**

Displays all students in your institution that are attending another institution for the same term.

[Go to report](#)

**Students with only unserved awards**

Displays all students in your institution that have at least one unserved WCG award and do not have any served WCG awards for the selected year.

[Go to report](#)

**Awards pending payment**

Displays all awards for your institution that are pending either a negative or positive payment.

[Go to report](#)

# Reports





- Available reports
  - Dual-Enrolled
  - Students with only unserved awards
  - Awards pending payment
  - All payments for program
  - Awards that have been cancelled
  - Awards that have been fully reimbursed
  - Awards with adjustments
  - Students in Institution to Bill (CSAW-Transmittal)

# Reports

## Dual Enrolled Report

- Displays all students in your institution that are attending another institution for the same term.

Dual Enrolled Report for 2019-2020 ▾

Student SSN ▾ Last ▾ First ▾	Combined Enrollment ▾	Term ▾	School Code ▾ - Name ▾	Enrollment	Served?			
					WCG ▾	CBS ▾	PTC ▾	
[Redacted]	2 ↑	Winter	University of Washington	Full time 1	✓	-	-	
[Redacted]			Green River College	Full time 1	✗	-	-	
[Redacted]	2 ↑	Spring	University of Washington	Full time 1	✓	-	-	
[Redacted]			Green River College	Full time 1	✗	-	-	
[Redacted]	2 ↑	Winter	University of Washington	Full time 1	✓	-	-	
[Redacted]			Green River College	Full time 1	✗	-	-	

Delete award

Clicking on student name will open the student record

# Reports

## Students With Only Unserved Awards

- Displays all students in your institution that have at least one unserved WCG award and/or do not have any served WCG awards for the selected year.
  - Detailed information on determining if a student is unserved is available in the “Interim Reporting” training webinar.

Students with only unserved awards for

All students in this report have only unserved SNG awards for the year. The terms listed are the terms that they have unserved awards for.

[download all to csv](#)

Showing 1-20 of 773

First Previous **1** 2 3 4 5 6 Next Last

Results per page

Student SSN <input type="text"/> Last <input type="text"/> First <input type="text"/>	Institution <input type="text"/>	Term	Enrollment
[REDACTED]	University of Washington	Fall	Full time
		Winter	Full time
		Spring	Full time
[REDACTED]	University of Washington	Fall	Full time
		Winter	Full time
		Spring	Full time

Clicking on student name will open the student record



# Reports

## Awards Pending Payments

- Displays all awards for your institution that are pending either a negative or positive payment.

Awards pending payment for 2019-2020 ▾

[download all to csv](#)

Showing 1-20 of 26034

First Previous **1** 2 3 4 5 6 Next Last

Results per page 20 ▾

Student SSN ▾ SID ▾ Last ▾ First ▾	Institution ▾	Term ▾	Enrollment ▾	Program ▾	Award Amount ▾	Paid Amount ▾	Pending Amount ▾
[REDACTED]	University of Washington	Fall	Full time	CBS	\$0.00	\$81.00	-\$81.00
[REDACTED]	University of Washington	Winter	Full time	WCG	\$3,583.00	\$0.00	\$3,583.00
[REDACTED]	University of Washington	Winter	Full time	CBS	\$167.00	\$0.00	\$167.00
[REDACTED]	University of Washington	Winter	Full time	WCG	\$3,583.00	\$0.00	\$3,583.00

Shows both positive and negative awards.

Clicking on student name will open the student record



# Reports

## All Payments For Program

- Displays all payments for your institution for the given program.

download all to csv    Change Program: WCG ▼

Showing 1-20 of 12582    First Previous 1 2 3 4 5 6 Next Last    Results per page 20 ▼

Student SSN ◆ SID ◆ Last ◆ First ◆	Term ◆	Enrollment ◆	Program ◆	Award Amount ◆	Paid Amount ◆	Request Date ◆	Processed Date ◆
[REDACTED]	Summer 1	Full time	WCG	\$3,583.00	\$3,583.00	Jul 17, 2019	Aug 7, 2019
[REDACTED]	Summer 1	3/4 time	WCG	\$1,881.00	\$1,881.00	Jul 17, 2019	Aug 7, 2019
[REDACTED]	Summer 1	Full time	WCG	\$3,583.00	\$3,583.00	Jul 17, 2019	Aug 7, 2019
[REDACTED]	Summer 1	3/4 time	WCG	\$1,970.00	\$1,970.00	Jul 17, 2019	Aug 7, 2019

Clicking on student name will open the student record






# Reports

## Awards That Have Been Cancelled

- Displays all awards for your institution that have been cancelled after being paid.

Awards that have been cancelled for 2019-2020 ▾

 download all to csv

Showing 1-20 of 238

First Previous **1** 2 3 4 5 6 Next Last

Results per page 20 ▾

Student SSN ↕ Last ↕ First ↕	Institution ↕	Term ↕	Enrollment ↕	Program ↕	Paid Amount ▾	Pending Amount ↕
[REDACTED]	University of Washington	Fall	Full time	CBS	\$166.00	-\$166.00
[REDACTED]	University of Washington	Fall	Full time	CBS	\$166.00	-\$166.00
[REDACTED]	University of Washington	Fall	Full time	CBS	\$166.00	-\$166.00
[REDACTED]	University of Washington	Fall	Full time	CBS	\$166.00	-\$166.00

Clicking on student name will open the student record




# Reports

## Awards That Have Been Fully Reimbursed

- Displays all awards for your institution that have been an award amount that equals the sum of all payment amounts.
  - Awards that have been requested and paid.

Awards fully reimbursed for 2019-2020 ▾

 download all to csv

Showing 1-20 of 16341

First Previous **1** 2 3 4 5 6 Next Last

Results per page 20 ▾

Student SSN ▾ SID ▾ Last ▾ First ▾	Institution ▾	Term ▾	Enrollment ▾	Program ▾	Award Amount ▾
[REDACTED]	University of Washington	Summer 1	< Half Time	WCG	\$582.00
[REDACTED]	University of Washington	Summer 1	< Half Time	CBS	\$355.00
[REDACTED]	University of Washington	Fall	Full time	WCG	\$3,583.00
[REDACTED]	University of Washington	Summer 1	< Half Time	WCG	\$896.00

Clicking on student name will open the student record



# Reports

## Awards With Adjustments

- Displays all awards for your institution that have been modified. Students who have had changes to enrollment status, term type, or applied baccalaureate will also show up in this report.

Awards with adjustments for 2019-2020

[download all to csv](#)

Showing 1-20 of 4755

First Previous **1** 2 3 4 5 6 Next Last

Results per page 20

Student SSN SID Last First	Institution	Term	Enrollment ( Updated By , Date )	Wcg Award Amount ( Updated By , Date )	Cbs Award Amount ( Updated By , Date )	Ptc Award Amount ( Updated By , Date )
[REDACTED]	University of Washington	Summer 1	Not enrolled Tony - 08/23/2019			
[REDACTED]	University of Washington	Summer 1	3/4 time Tony - 08/23/2019	\$2,687.00 Tony - 08/23/2019		
[REDACTED]	University of Washington	Summer 1	< Half Time	\$582.00 Tony - 07/24/2019	\$355.00	

Clicking on student name will open the student record



# Reports

## Receivable Transmittal

- Converting Institution to Bill to In Repayment
- Located in Portal: Home → CSAW → Transmittal → Status

Receivable Transmittal

Student SSN Status

Status  
Institution To Bill

Setup Date From MM/dd/yyyy Setup Date To MM/dd/yyyy

Q search

**Edit All**

Showing 1-10 of 23 results

First Previous 1 2 3 Next Last

SSN	Name	Year	Institution	Term	Program	Status	Setup Date	Balance	Initial Debt	Actions
		2019-2020	University of Washington	Summer 1	SNG	Institution To Bill	08/09/2019	1498	1498	<b>Edit</b> <b>+ Add</b>
					CBS	Institution To Bill	08/09/2019	69	69	
		2019-2020	University of Washington	Fall	SNG	Institution To Bill	10/17/2019	1085	1085	<b>Edit</b> <b>+ Add</b>
					CBS	Institution To Bill	10/17/2019	63	63	

# Reports

## Receivable Transmittal

- Edit/change all students or individual student

**[Redacted]**

[+ Add new receivable](#)

Or edit an existing receivable

	Year	Institution	Term
<a href="#">Edit</a>	2019-2020	University of Washington	Summer 1

[Previous person](#) Person 1 of 23 [Next person](#)

**[Redacted]**

Year	Institution	Term
2019-2020	University of Washington	Summer 1

**Status:** Institution To Bill

SNG	CBS	PTC
Award found	Award found	Award not found
<b>Award Amount</b> \$1,503.00	<b>Award Amount</b> \$97.00	<b>Can't add receivable</b>
<b>Initial Debt</b> \$1,498.00	<b>Initial Debt</b> \$69.00	

Date Student Notified	Reason for Repayment
08/09/2019	Official Withdrawal

**Edit Actions**

[Modify details](#) [Change to In Repayment](#) [Cancel receivable\(s\)](#)

[Previous person](#) Person 1 of 23 [Next person](#)

# Questions?

[WCG@wsac.wa.gov](mailto:WCG@wsac.wa.gov)

1-888-535-0747 Opt 3

**Thank you for joining us!**

