

# UNIT RECORD REPORT

Submitting the 2013-14 Report  
**Via the Portal**

Webinar Training Presentation  
CTC Financial Aid Administrators  
August 19, 2014

## Council:

- **Steve Thorndill, Associate Director,  
Training & Compliance**
- **Kara Larson, Data Analyst**
- **Ann Voyles, Program Associate**
- **Dave Richard, Senior Software  
Developer & Project Specialist**

## SBCTC-IT:

- **Becky Phillips, Product Manager**

# Purpose of 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**

**URR Manual now available electronically**  
**<http://www.wsac.wa.gov/unit-record>**

**August 15:** Unit Record Report (URR)  
application available

**October 10:** Finalized report due

**October/November:** WSAC analysis

**December:** Reports to policy makers

**January:** Institutional profiles available

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

- **Appendices**

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

B – Record Layout - File Format and Valid Inputs

C – System Edits that Prevent File Upload & Import

D – Quick Lookup by Financial Aid Program

E – Quick Lookup by Unit Record Report Field Name

F – Information for Institutions New to the URR Portal  
Application

- **Building a CSV file for submission**
  - Report only students who received financial aid based on the 2013-14 FAFSA year
  - Report files in CSV 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 – 2013-14 FAFSA required
  - Need-Based Aid Recipients – other programs where FAFSA data may or may not be available
  - Non-Need Based Loan 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*



- SM9738J – CTC Unit Record job has been modified to produce a CSV file
  - File includes students who received financial aid during the 2013-14 year
  - File includes header row
- SBCTC-IT has been working with WSAC to ensure that file is correct format and passes portal file edits

# Reporting Requirements

- **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 2013-14 FAFSA
  - Report on next year's URR all financial aid received based on the 2014-15 FAFSA



- SM9738J selects:
  - 2013-14 Need-Based recipients
  - 2013-14 Non-Need Based Federal Loan Recipients

# Programs to Report

- **Need-Based Recipients – FAFSA fields required**
  - Federal Pell Grant
  - Federal SEOG
  - Federal Work Study
  - Federal Perkins Loan
  - Federal Direct Subsidized Loan
  - State Need Grant
  - College Bound Scholarship
  - Passport to College Scholarship
  - State Work Study (On- and Off-Campus)
  - Need-Based Institutional Gift Aid

- **Need-Based Recipients – Other Programs**
  - Federal TEACH Grant
  - Federal Health Professional Scholarships and Grants
  - Federal Health Professional Loans
  - GET Ready for Math & Science
  - Opportunity Scholarship
  - SBCTC Opportunity Grant
  - Other State Funded Assistance
  - Worker Retraining Program Funds (include BFET)
  - Need Based Institutional Gift Aid
  - Institutional Employment (if need based)

# 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 on for your recipients.
- Should be reported as WorkForceTrainingFunds

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

*Note: For any of these loan recipients you report who are not also receiving need-based assistance, the information you report will be minimal.*



- Both Need-Based awards and Non-Need Based Federal Loans have separate Processing Table entries. All are on the CIS/WAT Processing Table.
- New Processing Table entries were added last year
- Check the SBCTC-IT URR documentation when available

- **Refer to Page iii**
- **Field Rule Changes**
  - *First Name* – Required for each student
  - *Middle Name* – Provide if available (middle initials are okay too if full name not available)
  - *Gender* – Now required; New code ‘3’ or ‘Unknown’ (not permissible for FAFSA filers)

- **Valid Input Range Changes**

Category	Old Value	New Value
Family Income	-100000 to 350000	- 200000 to 500000
Cost of Attendance	0 to 99999	0 to 200000
Federal Pell Grant	0 to 5550	0 to 5650
Direct Subsidized Loans	0 to 8500	0 to 17000
SBCTC Opportunity Grant	No maximum	0 to 10000

- **Field Definition Expansion**

- *Institution Student ID* – Report first characters as:
  - Public baccalaureates – 9-character PCHEES number
    - Required but overrideable
  - CTCs – 9-character college-assigned SID number
    - Required but overrideable
  - Private Institutions – may provide or leave blank
- *Federal Nursing Scholarships* – Report Federal scholarships and grants for other health professional training here
- *Federal Nursing Health Loans* – Report any other Federal health professions student loan funds here
- *Passport to College Scholarship Program* – If incentive grants were provided to students as additional scholarships, add amount to this award



- SM9738J – CTC 2013-14 Unit Record job has been modified to include the new required student data

- **Field Definition Expansion** (continued)
  - *Year in School:*
    - Code '1' or 'Freshman/1<sup>st</sup> Year' – Do not include 100 level remedial courses in credit hours
    - Code '3' or 'Junior/3<sup>rd</sup> Year' – Include first year applied baccalaureate students who already have an associate's degree
    - Code '4' or 'Senior/4<sup>th</sup> Year' – Include second year applied baccalaureate students who already have an associate's degree
    - Code '5' or 'Unclassified/5<sup>th</sup> Year' – Include those working on a 2<sup>nd</sup> bachelors and students with a bachelors who are getting an associate's degree



- SM9146J – Post SM Grade Level to FAID/Credit job has been modified to post the Year in School based on new requirements
  - Only look at college level earned credits
  - BAS students will have correct Year in School posted (identified by 'I' Intent)
  - Students with bachelor degrees (Yes on FAFSA Question # 28) will have '5' posted

# Reporting Requirements

- **For all financial aid recipients reported**
  - **Fields required:**
    - SSN
    - Is State Resident
    - Year In School
    - Financial Aid per term - even if '0'
    - First Name
    - Last Name
    - Gender
    - Enrollment Status per term
  - 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

# Reporting Requirements

- **CSV file requires header row (sample is available)**
- **Financial aid reported on 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)



- SM9738J selects:
  - Need-Based recipients
  - Non-Need Based Federal Loan Recipients
  - Will produce CSV file with required header
  - All 5 quarters are included in CSV file
    - Data from the appropriate quarter will be placed in appropriate location in CSV file

# Reporting Requirements

- **When to include summer aid in your reporting**
  - Review Chapter 2 of manual for detailed information
  - Summer aid to be reported are the amounts received based on the 2013-14 FAFSA submission
  - In general:
    - Leader/Header schools to report Summer 1 aid (Summer 2 should be reported as '0' aid received)
    - Trailer schools to report Summer 2 aid (Summer 1 should be reported as '0' aid received)
  - If a recipient was enrolled for more than one summer term (in the same summer), report the total amount received and the enrollment status for the student's full summer enrollment



- Included awards in B341 will be placed in the Summer 1 location in the CSV file
- Included awards in B345 will be placed in the Summer 2 location in the CSV file

- **Fields to also report for 2013-14 FAFSA filers**
  - Marital Status
  - Is Dependent
  - Family Size
  - Number in College
  - Family Income
  - Expected Family Contribution (EFC)
  - Cost of Attendance (COA)
  - Need Duration
  - Need Amount



- This data will be included in the CSV file for FAFSA filers

# SPECIAL NOTES ABOUT SELECTED FIELDS

# Social Security Numbers

- Duplicates are not accepted
  - Files containing duplicate SSNs will not upload
- SSNs of State Need Grant and College Bound Scholarship recipients will be compared to the SSNs reported in the SNG/CBS July final interim report
- Discrepancies will show on edit reports

# Year in School

- Do not automatically use the Year in School reported on FAFSA
- Report the highest Year in School for which the student attended when the student's financial aid was disbursed



- Run SM9146J – Post SM Grade Level to FAID/Credit job prior to running SM9738J
- Correct value will be posted to the Year in School field on the FA Tab in FAM
- SM9738J will use the value posted to the Year In School field on the FA Tab in FAM

# Family Information

- Family Size
  - Generally reported from the FAFSA
  - Must be 2 or higher for dependent students
  - Must be 1 or higher for independent students
- Number in College
  - Must be 1 or higher
  - Cannot exceed the Family Size
  - Parents' enrollment in college should not be included unless it was a professional judgment

# Family Income

- Report the Family Income (taxable and untaxed) based on a review of the 2013-14 FAFSA
  - Often will be the 2012 income from FAFSA
  - 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



- If dependent, the parent's AGI and untaxed income is reported
- If independent, the student's AGI and untaxed income is reported
- Negative incomes will be reported

- Report the Expected Family Contribution (EFC)
  - Often will be the Federal Methodology calculation produced by U.S. Department of Education based on the 2013-14 FAFSA
  - May be adjusted by professional judgment decisions
  - Should reflect the number of months reported in Need Duration

# Cost of Attendance

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

# Need Amount

Cost of Attendance

- Expected Family Contribution

= Need Amount

- All three items above should be based on the number of months reported in Need Duration
- For Need Amount, report the amount used in the disbursement of aid
- Need Amount should be reported as '0' or higher (do not report negative values)



- SM9738 will generate an error message of 'Need Amount Invalid' if the Need Amount is not the Cost of Attendance minus the combined Student and Parent Contribution

# 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	URR Codes
Not Enrolled	n/a	'0' or 'Not enrolled'
Full-Time	12 or more	'1' or 'Full time'
Half-Time	6 to 8	'2' or 'Half time'
Three-Quarter Time	9 to 11	'3' or '3/4 time'
Less Than Half-Time	Less than 6	'5' or '< Half time'

# State Need Grant

- Report the final awards received by the student
- The Unit Record Reporting tool checks against SNG Final Interim Report - critical
- Review the “SNG Students Not Reported” report to verify all SNG recipients and awards are correctly reported

# College Bound Scholarship

- Report the final awards received by the student
- The Unit Record Reporting tool checks against SNG Final Interim Report - critical
- Review the “College Bound Scholarship Not Reported” report to verify College Bound recipients and awards are correctly reported

# State Work Study

- Separate on-campus & off-campus employment
- Report students' total gross earnings, which includes employer match
- Include summer employment
- Report either:
  - Actual gross earnings based upon monthly cutoff 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 2013-14 FAFSA
  - Non-Need Based Institutional Gift Aid - all institutional grants, scholarships and or waivers awarded without regard to the FAFSA

# Other State Funded Gift Assistance

- Report sources of state aid not reported elsewhere. Examples include:
  - American Indian Endowment Scholarship
  - GEAR UP
  - Washington Scholars
  - Washington Award for Vocational Excellence (WAVE)



- Complete list of the aid categories and corresponding Processing Table entry will be included in the SBCTC-IT Unit Record documentation
- Notice will be sent to Dirfinaid when the documentation is available and when the 2013-14 SM9738J is available

# EDITS

# Edits to Ensure Data Quality

- Edits help ensure data quality
- Edits are “softened” for students receiving only Non-Need Based Federal Loans
- FAFSA related edits are also “softened” for students not receiving FAFSA required aid types

# Edits that Prevent File Upload

- **Refer to Appendix C (page 36) in the manual**

Examples of errors that prevent upload

- Header row missing or invalid
- Duplicate SSNs
- Invalid codes
- Blanks reported in required fields

*Be sure to review all 12 items!*



- **Refer to Appendix C (page 37) in the manual**
  - No financial aid reported
  - Non-resident with SNG or other state aid
  - Number in College greater than Family Size

# Overrideable Edit Examples

- **Refer to Appendix C (pages 37- 38) - Field content**
  - Need Amount is Zero with Need-Based Aid
    - Budget changed with dropped credits
  - Year in School for Aid Type (Federal Grad PLUS Loan)
    - Student graduated mid year
  - Date of Birth outside of normal range
  - Cost of Attendance minus Expected Family Contribution (calculated by the edit program) does not equal Need Amount reported by the college



- Edits in SM9738J mimic WSAC edits
- Students with errors on SM9738 reports are included in the CSV file except:
  - Student's award amounts are zero
  - Student has awards that aren't entered in a CIS/WAT Processing Table entry
- 'C' report has been modified to optionally list students by error message or error messages by student

## Tips and Best Practices

- Upload your CSV file early – don't wait until the submission deadline!
- Review the manual and training materials, and test upload using the Portal training environment:

<https://fortress.wa.gov/wsac/portaltraining/>

(Data entered is temporary; info clears overnight)

- Use the URR informational reports to check for consistency & validity
- CTCs – Review SBCTC documentation
- Contact us with questions or problems not addressed in the manual



- CTC URR Basic Steps
  - Reconcile awards with expenditure data
  - Run job to post SMS Year in School to FA tab
  - Run job to update academic hours on Academic tab
  - Run job to update Residence status from SMS
  - Run DataExpress procedure to determine if award code was used during 2013-14
  - Update CIS/WAT Processing Table

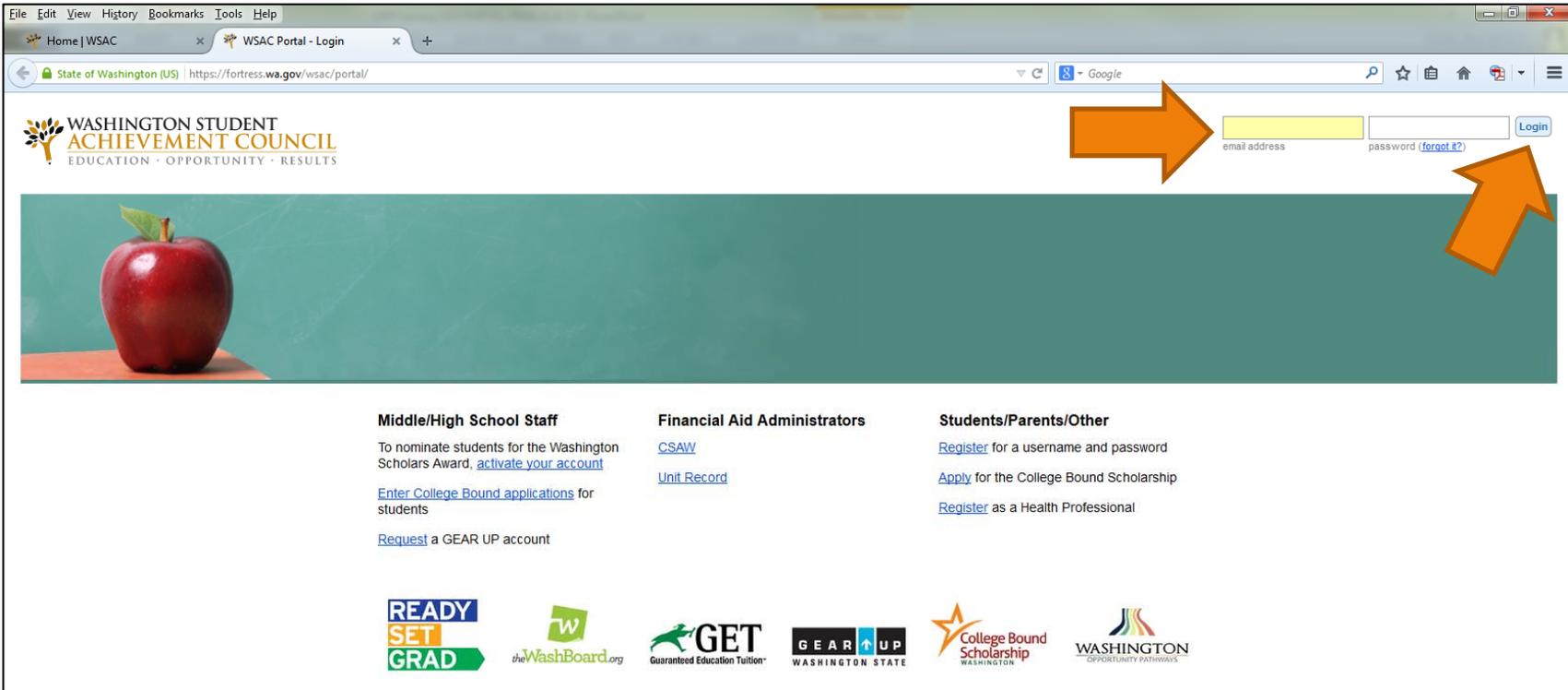


- CTC URR Basic Steps (continued)
  - Run SM9738J
  - Review reports and correct errors
  - Run SM9738J in final mode to generate final reports and CSV file
  - Download CSV file to local network drive using HPUX screen SM9724
  - Upload CSV file to WSAC Portal

# USING THE WEB APPLICATION

# Logon to the Portal

<https://fortress.wa.gov/wsac/portal/>



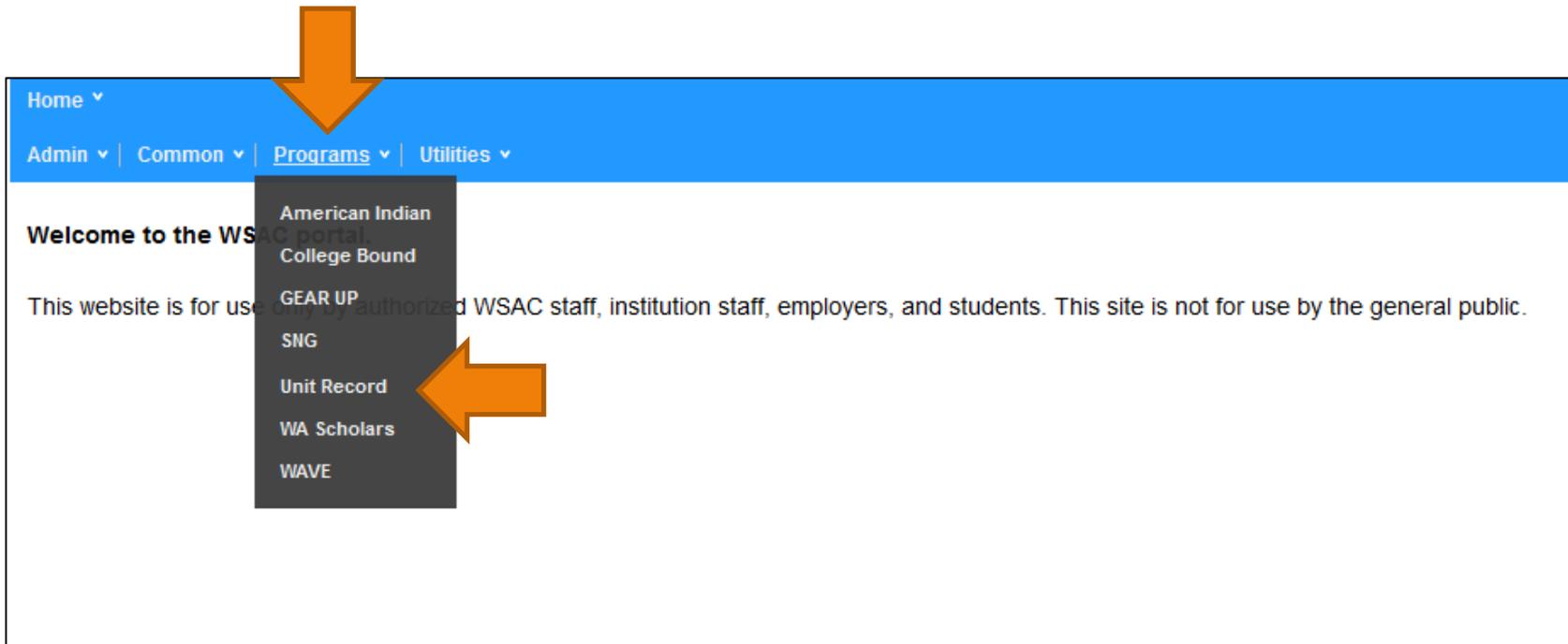
The screenshot shows a web browser window with the URL <https://fortress.wa.gov/wsac/portal/>. The page features the WSAC logo and a navigation menu. Two orange arrows point to the login fields: one to the 'email address' input field and another to the 'password' input field, which includes a 'forgot #?' link. Below the login fields is a large banner image of a red apple on a wooden surface. The main content area is divided into three columns:

- Middle/High School Staff**
  - To nominate students for the Washington Scholars Award, [activate your account](#)
  - [Enter College Bound applications](#) for students
  - [Request](#) a GEAR UP account
- Financial Aid Administrators**
  - [CSAW](#)
  - [Unit Record](#)
- Students/Parents/Other**
  - [Register](#) for a username and password
  - [Apply](#) for the College Bound Scholarship
  - [Register](#) as a Health Professional

At the bottom of the page, there are logos for several programs: **READY SET GRAD**, **theWashBoard.org**, **GET Guaranteed Education Tuition**, **GEAR UP WASHINGTON STATE**, **College Bound Scholarship WASHINGTON**, and **WASHINGTON OPPORTUNITY PATHWAYS**.

# URR Portal Submission Tool

In the Programs menu, click on Unit Record.



The screenshot shows the top navigation bar of the WSAC portal. The 'Programs' menu is open, displaying a list of options. An orange arrow points to the 'Programs' menu item in the top bar, and another orange arrow points to the 'Unit Record' option in the dropdown menu. The background of the page shows a welcome message and a disclaimer: 'This website is for use only by authorized WSAC staff, institution staff, employers, and students. This site is not for use by the general public.'

- Home ▾
- Admin ▾
- Common ▾
- Programs ▾
  - American Indian
  - College Bound
  - GEAR UP
  - SNG
  - Unit Record
  - WA Scholars
  - WAVE
- Utilities ▾

# URR Portal Submission Tool

## Welcome to the Unit Record Warehouse!

### The Process:

1. Upload your student data file
2. Address any errors in the data and override as necessary
3. Optionally review or add individual student records
4. When the data is complete, review and submit the report

Next: Proceed to Upload



- The welcome screen will appear on your first login.
- From the welcome screen, click on “Next: Proceed to Upload.”
- If logging in after URR data has been entered, you will be taken directly to the current step: “Ready to Begin,” “In Progress,” or “Submitted.”

# Uploading Data From File

PLEASE NOTE: Each upload attempt represents a FRESH start. All existing data for the year will be deleted.

**Large CSV files (over 10MB) should be zipped before uploading.**

No file selected...

browse

1

upload

Or

[Add Students Manually](#)

2

1. Select a CSV file.
2. Upload.

## Processing file...



processing... 17.75% complete

A progress bar allows users to see how much of the file has been reviewed for upload errors.

# Uploading Data From File

Error message(s) appear if the file fails the upload process.



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

Row 79: Field 'LastName' is required

discard file

The screenshot shows a red error message box. An orange arrow labeled 'ROW #' points to the top-left corner of the box. The error message text is in red. Below the message, a light blue button labeled 'discard file' is visible. An orange arrow labeled 'Field error' points to the text 'Field 'LastName' is required'. Another orange arrow labeled 'Discard button' points to the 'discard file' button.

Discard the file, correct the error, and re-upload.

# Uploading Data From File

Once the file upload is complete, verify the total number of students and the number of students by year in school.

Proceed to Edits.

## File Upload Complete!

Press 'Proceed to Edits' if the uploaded data appears to be correct. Otherwise, press 'Discard Upload' to start again.

Proceed to Edits

Discard Upload



<b>Total Student Rows</b>	457
<b>Class Counts -</b>	
Freshman/1st Year	25
Sophomore/2nd Year	27
Junior/3rd Year	42
Senior/4th Year	191
Graduate	169
Other	3

# Processing Edits

This may take awhile. Edits can be fixed while the Portal reviews remaining records for edits. Periodically click “Refresh.”

processing... 

230/ 457

We're currently processing your edits. You may work on resolving edits as we process them. You can also leave this page or log out and come back when processing is complete.

Alternatively, we can [email you a csv download](#) of all your edits once processing completes.

### Unit Record Edits



Showing results 1 - 4 of 4

<a href="#">SSN</a>	<a href="#">Student ID</a>	<a href="#">Last</a>	<a href="#">First</a>	<a href="#">Middle</a>	<a href="#">Error</a>	<a href="#">Overridable</a>
<a href="#">999999559</a>	Stu0484	Smith	A		Student not Enrolled	Overrideable
<a href="#">999999560</a>	Stu0483	Johnson	D	D	College Bound Scholarship award not found in WSAC records	Overrideable

# Processing Edits

Filter by Edit Type or Sort by SSN, Student ID, Name, Error message or Overrideable.

Last processed on 8/8/2013 8:30:56 AM

[download all edits into csv](#)
[Reprocess Edits](#)
[Delete Upload](#)
[Add a new unit record to the report](#)

### Unit Record Edits

6 errors (5 overrideable - 1 overridden; 0 informational)

Show Informational
  Overridden

SSN	Student ID	Last	First	Middle	Error	Overrideable
<a href="#">999999955</a>	STU0484	Smith	K		Date Of Birth outside expected range	Overridden
<a href="#">999999955</a>	STU0484	Smith	K		Student Id Number must be at least 9 characters for publics	Overrideable
<a href="#">999999955</a>	STU0484	Smith	K		Student not Enrolled	Overrideable
<a href="#">999999955</a>	STU0484	Smith	K		Total aid reported is zero	

# Processing Edits

The file cannot be submitted until all Non-Overrideable edits are fixed and all Overrideable edits are fixed or overridden with a reason.

To override or edit student data, click on student's SSN to open the student record.

<u>SSN</u>	<u>Student ID</u>	<u>Last</u>	<u>First</u>	<u>Middle</u>	<u>Error</u>	<u>Overrideable</u>
<a href="#">999999559</a>	Stu0484	Smith	A		Student not Enrolled	Overrideable
<a href="#">9999</a>	Stu0483	Johnson	D	D	College Bound Scholarship award not found in WSAC records	Overrideable



# Processing Edits

999-99-9559
Smith, A
SID: Stu0484
[Add a new Unit Record](#)

**Errors**

Student not Enrolled + Override

**Student Demographics and Need**

**Student Aid**

SSN	<input type="text" value="999999559"/>	Institution Student Id	<input type="text" value="Stu0484"/>	Marital Status	<input type="text" value="UnMarried"/>
Last Name	<input type="text" value="Smith"/>	First Name	<input type="text" value="A"/>	Middle Name	<input type="text"/>
Date of Birth	<input type="text" value="1/29/1987"/>	Is Dependent	<input type="text" value="Yes / true"/>	Year in School	<input type="text" value="Senior/4th Year"/>
Gender	<input type="text" value="Female"/>	Family Size	<input type="text" value="5"/>	# Family in College	<input type="text" value="1"/>
		Is State Resident	<input type="text" value="Yes / true"/>		

**Need**

+ Cost of Attendance	<input type="text" value="35352"/>	Total Family Income	<input type="text" value="7268"/>
- Expected Family Contribution	<input type="text" value="0"/>	Need Duration (months)	<input type="text" value="9"/>
= Need Amount	<input type="text" value="35352"/>		

**Ethnicity/Race**

Is of Hispanic Origin	<input type="text" value="Yes / true"/>	Is Native Hawaiian/Pacific Islander	<input type="text" value="No / false"/>
Is Asian	<input type="text" value="Yes / true"/>	Is White	<input type="text" value="Yes / true"/>
Is Black/African American	<input type="text" value="No / false"/>	Is Other Race	<input type="text" value="No / false"/>
Is American Indian Alaska Native	<input type="text" value="No / false"/>		

<<Prev Next>> Save Delete

# Processing Edits

Edit the data or override with a reason.

999-99-9559      Smith, A      SID: Stu0484      [Add a new Unit Record](#)

**Errors**

Student not Enrolled      [+ Override](#)

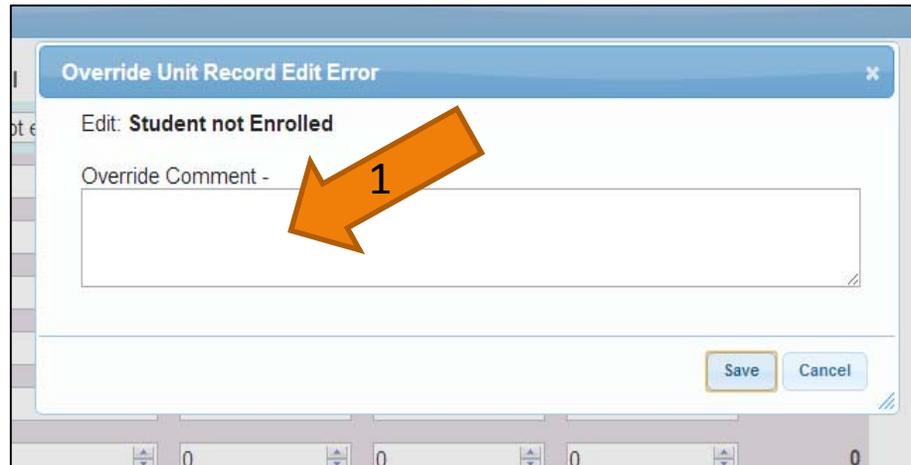
**Student Demographics and Need**      **Student Aid**

	Summer 1	Fall	Winter	Spring	Summer 2	Total
<b>Enrollment Status</b>	Not enrolled					
<b>Federal Pell Grant</b>	Not enrolled	0	0	0	0	0
<b>Federal SEOG</b>	Full time	0	0	0	0	0
	Half time	0	0	0	0	0
	3/4 time	0	0	0	0	0
	< Half Time	0	0	0	0	0
<b>Federal Work Study</b>	0	0	0	0	0	0
<b>Federal Perkins Loan</b>	0	0	0	0	0	0
<b>Federal Nursing Health Loans</b>	0	0	0	0	0	0
<b>Federal Nursing Scholarships</b>	0	0	0	0	0	0
<b>Federal Subsidized Stafford Loans</b>	0	0	0	0	0	0
<b>Federal Unsubsidized Stafford Loans</b>	0	0	0	0	0	0
<b>Federal TEACH Grant</b>	0	0	0	0	0	0

<<Prev      Next>>      Save      Delete

# Processing Edits

1. If overriding, enter reason in the pop-up box.



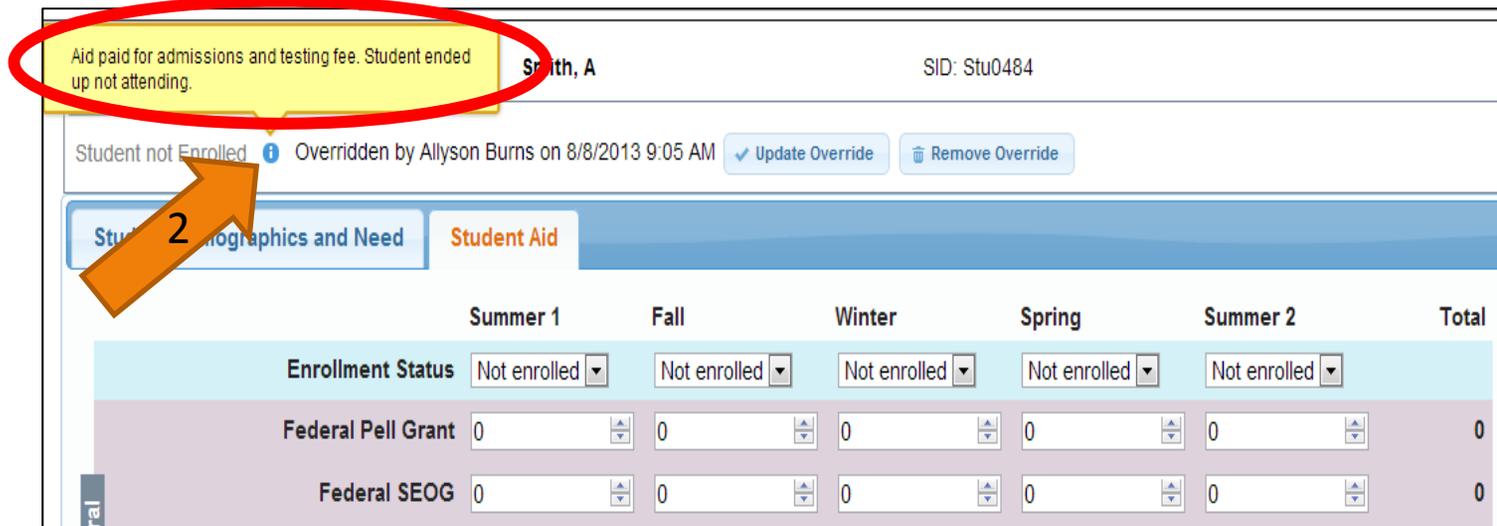
Override Unit Record Edit Error

Edit: Student not Enrolled

Override Comment -

Save Cancel

2. Hover mouse over the information icon to review the override reason.



Aid paid for admissions and testing fee. Student ended up not attending.

Smith, A SID: Stu0484

Student not Enrolled *i* Overridden by Allyson Burns on 8/8/2013 9:05 AM [Update Override](#) [Remove Override](#)

Student Demographics and Need **Student Aid**

	Summer 1	Fall	Winter	Spring	Summer 2	Total
Enrollment Status	Not enrolled					
Federal Pell Grant	0	0	0	0	0	0
Federal SEOG	0	0	0	0	0	0

# Student Aid Screen

All aid must be reported by term. If the term is not applicable at the school, report “Not enrolled” and “0” funding (typically).

	Summer 1	Fall	Winter	Spring	Summer 2
<b>Enrollment Status</b>	Not enrolled ▾				

- Federal**
- Federal Pell Grant
  - Federal SEOG
  - Federal Work Study
  - Federal Perkins Loan
  - Federal Nursing Health Loans
  - Federal Nursing Scholarships
  - Federal Subsidized Stafford Loans
  - Federal Unsubsidized Stafford Loans
  - Federal TEACH Grant
  - Federal Grad PLUS Loans
  - Federal Parent PLUS Loans

- State**
- State Need Grant
  - Opportunity Scholarship
  - WorkForce Training Funds
  - SBC TC Opportunity Grant
  - Passport to College Scholarship
  - College Bound Scholarship
  - Other State Funded Gift Assistance
  - On Campus State Work Study
  - Off Campus State Work Study
  - GET Ready for Math Science

- Institution / Other**
- Outside Scholarships
  - Need Based Institutional Gift Aid
  - Non-Need Based Institutional Gift Aid
  - Institutional Employment
  - Other Agency Assistance
  - Other Loans
  - Conditional Loans
  - Private Loans
  - Institutional Loans

# Submitting Report

When all errors have been fixed or overridden, “Submit This Unit Record Report” will show.

Last processed on 8/8/2013 10:37:53 AM
 [download all edits into csv](#)
[Reprocess Edits ↻](#)
[Delete Upload ^](#)
[Add a new unit record to the report](#)

**Unit Record Edits**

**4 errors** (4 overridable - 4 overridden; 0 informational)
 Filter by Edit Type  Show

Informational  Overridden

**All edits have been addressed - you may submit your report.**

[Submit This Unit Record Report](#)

Showing results 1 - 4 of 4

SSN	Student ID	Last	First	Middle	Error	Overridable
<a href="#">999999559</a>	Stu0484	Smith	A		Student not Enrolled	Overridden
<a href="#">999999573</a>	Stu0470	Jones	S	M	Cost Of Attendance minus EFC does not equal Need	Overridden
<a href="#">999999742</a>	Stu0301	Lee	B	J	State Need Grant award not found in WSAC records	Overridden
<a href="#">999999894</a>	Stu0149	White	S	E	Federal Parent PLUS Loan recipient cannot be reported as graduate student	Overridden



# Submitting Report

Review data summary.

Click “Submit Unit Record Report”

**Congratulations, your report can now be submitted to the Washington Student Achievement Council**

[Submit Unit Record Report ^](#) -OR- [Delete Upload ^](#) [Add a new unit record to the report](#)

Unit Record Report Information for <b>School Name</b> - 2012-2013	
Total Student Records in the Report	<b>457</b>
Total Edit Messages Present	<b>4</b>
Overrideable/Overridden:	<b>4</b>
Informational:	<b>0</b>

# WHERE TO DIRECT QUESTIONS and RECEIVE ASSISTANCE



- For help with setup in FAM, running any of the jobs, correcting errors and downloading the CSV file, contact SBCTC-IT Customer Support.

[support@sbctc.edu](mailto:support@sbctc.edu)

425-803-9721

# Council Contacts

- Review the manual, available online at:

<http://www.wsac.wa.gov/unit-record>

- Contact Washington Student Achievement Council staff at [unitrecord@wsac.wa.gov](mailto:unitrecord@wsac.wa.gov)

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