Washington Student
Achievement Council

UNIT RECORD REPORT

Submitting the 2012-13 Report

Via the Secure Site

Webinar Training Presentation

August 2013

Purpose of Unit Record

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

Timeline

- August 20: URR application available
- **October 11**: Finalized report due
- October/November: WSAC analysis
- December: Reports to policy makers
- January: Institutional profiles available

Manual Overview

- Introduction
  - Overview, purpose, changes, and timeline
- Chapter 1 – General Instructions
- Chapter 2 – Data Definitions
- Chapter 3 – Reporting Application User Guide
- Chapter 4 - Edits
- Appendices

Manual Overview

- Appendices
  - A – Financial Aid by Type
  - B – Institutional Codes
  - C – Record Layout and Valid Field Content
  - D – Quick Lookup by Financial Aid Program
  - E – Quick Lookup by Category

Changes for 2012-13 Reporting

- Field 40 Educational Opportunity Grant: this program is no longer operational – will be used by a new program
- Field 52 Need Associated Disbursement*
- Field 53 Disbursement Associated Need*
- Fields 54 and 55 Federal Academic Competitiveness Grants*
- Fields 56 and 57 Federal Smart Grants*

**May report as '0' or leave blank*

Changes for 2012-13 Reporting

- Field 40 Opportunity Scholarship: new program with first disbursements in 2012-13
- Field 49 Student's Last Name: now required, was optional in previous years
- Field 62 College Bound Scholarship: first disbursements in 2012-13

Reporting Requirements

- Determine which students to include
  - All need-based aid recipients (see Appendix A)
  - Non-need based loan recipients of Unsubsidized Stafford Loans, PLUS, & Grad PLUS loans (required)

Reporting Requirements (continued)

- **Need-Based Recipients**
  - Intent is to capture all financial aid disbursements in a Unit Record Report
  - Report all financial aid received related to filing of the 2012-13 FAFSA with this report
  - Report on the 2013-14 URR all financial aid received related to the 2013-14 FAFSA

Reporting Requirements (continued)

- For each student reported
  - Identify whether they are a need-based aid recipient (Field 69, yes/no)
  - Determine whether they have a FAFSA on file (Field 70, yes/no)
    - All need-based aid recipients should have a FAFSA
    - Non-need based loan recipients may or may not have a FAFSA on file

Reporting Requirements (continued)

- For need-based aid recipients
  - All fields are required except race, first and middle initial, and institutional ID
  - All aid received should be reported regardless of the type of aid
  - Does not matter if student received state aid or not
  - In addition to the need-based aid, report all scholarships, loans, etc.

Reporting Requirements (continued)

- For recipients of only non-need based federal loans, only the following additional fields are required:
  - Institution Code (Field 1)
  - Social Security Number (Field 2)
  - State Residency Code (Field 3)
  - Enrollment Status by Term (Field 4-8)
  - Year in School (Field 9)
  - Student's Last Name (Field 49)

Reporting Summer Aid

- 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 2012-13 FAFSA submission
  - In general:
    - Leader/Header schools to report Summer 1 aid (and Summer 2 should be reported as '0' aid received)
    - Trailer schools to report Summer 2 aid (and 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

Reporting Requirements (continued)

- Building a file
  - Report only students who received aid during the 2012-2013 academic year, including applicable summer(s)
  - All files must be in CSV format – do not, however, include a header row in the file
  - Review the field definitions in Chapter 2 of the manual & the record layout in Appendix C to determine valid field content

SPECIAL NOTES
ABOUT SELECTED FIELDS

Social Security Number Field 2

- Duplicates are not accepted
  - Files containing duplicate SSN's will create a non overrideable edit
- SSN's for State Need Grant and College Bound Scholarship recipients will be compared to the SSN in the SNG interim reports
  - Errors will be noted in "SNG Students Not Reported" and "College Bound Scholarship Recipients Not Reported" links

Year in School Field 9

- Do not automatically use the year in school reported on FAFSA
- Use the highest year in school for which financial aid was last disbursed during the 2012-13 reporting year

Race & Ethnicity Fields 12-19

- Hispanic Origin (Field 12)
  - Report Yes (1), No (0), or Unknown (2)
- Race Data Available (Field 13)
  - Report Yes (1) or No (0)
  - If Yes, then at least one field among race fields 14-19 must also contain a value of Yes (1)

College Bound Scholarship Field 62

- Report the most current and accurate awards received by the student
- The Unit Record Reporting tool checks against SNG/CBS Final Interim
- "College Bound not found in WSAC Records" - this edit can be overridden
- Review the "College Bound Students Not Reported" report to verify all College Bound recipients and awards are correctly reported

State Need Grant Field 36

- Report the most current and accurate awards received by the student
- The Unit Record Reporting tool checks against SNG/CBS Final Interim
- "SNG not found in WSAC Records" - this edit can be overridden
- Review the "SNG Students Not Reported" report to verify all SNG recipients and awards are correctly reported

State Work Study Fields 37-39

- Report students' total gross earnings, which includes employer match (Field 37)
- Include summer employment
- Separate on-campus (Field 38) & off-campus employment (Field 39)
- SWS Total (Field 37) must equal the sum of on-campus (Field 38) & off-campus (Field 39)

Institutional Grants & Scholarships

- Report scholarships and grants in one of four fields
- Depends on aid source
- May depend on need-based status

Institutional Aid Fund Grants & Scholarships Field 67

- Field used only by public institutions
- Report the amount of grants or scholarships disbursed from the 3.5% or 4% Institutional Financial Aid Fund
- Need-based assistance

Institutional Grants and Scholarships Field 45

- Field can be used by all institutions
- Use for reporting both need-based and non-need based
- Report institutional grants or scholarships, including those funded by foundation, or endowment funds
- Note: Public Institutional Grants and Scholarships (3.5%, 4%) should be reported in field 67

Need-Based Tuition & Fee Waivers Field 41

- Field can be used by all institutions
- Only report need-based tuition and fee waivers here

Non-Need Based Waivers Field 68

- Field can be used by all institutions
- Only report non-need based waivers here
- Note: waivers based on both merit and need should be reported in Need-Based Tuition and Fee Waivers (Field 41)

Outside Scholarships Field 47

- Report outside scholarships not reported elsewhere. Some examples include:
  - Employer funded tuition assistance
  - Company scholarships
  - Other states' scholarships
  - AmeriCorps

All Other State-Funded Assistance Field 43

- Report sources of state aid not reported elsewhere. Examples include:
  - American Indian Endowment Scholarship
  - GEAR UP
  - Scholars
  - WAVE

Need-Related Fields Fields 24, 25, 26, 27, 64

- Data reported in the following fields are related to one another – review definitions & calculations carefully
  - Amount of Need (Field 24)
  - Duration of Need (Field 25)
  - Parent Contribution (Field 26)
  - Student Contribution (Field 27)
  - Cost of Attendance (Field 64)

Amount of Need Field 24

- Generally calculated by subtracting Parent & Student Contribution (Fields 26 & 27) from Cost of Attendance (Field 64)
- The amount should:
  - be based on Duration of Need (Field 25)
  - be greater than zero for need-based aid recipients (Field 69 = 1)
  - varies by student
- May be greater than zero for some non-need based aid recipients (Field 69=0)

New Edit for Need

Cost of Attendance (Field 64)
- Expected Family Contribution *
= Amount of Need (Field 24)

**Total of Parent and Student Contribution (Fields 26 and 27)*

- All items above should be based on the number of months in Duration of Need (Field 25)
- Amount of Need should be reported as '0' or higher (do not report negative values)

Duration of Need Field 25

- Should be greater than zero for need-based aid recipients (Field 69=1)
- Should be greater than zero if Amount of Need (Field 24) is greater than zero

Cost of Attendance Field 64

- Report the student budget amount related to amount of need (Field 24) and duration of need (Field 25)
  - The amount of need should not exceed the cost of attendance in most cases
- Most campuses use several student budgets to reflect changes in living expenses

Number of Family in College Field 63

- Include parents' enrollment only if included as a part of needs analysis through an exception (Field 24)

- Can not exceed Number of Family Members (Field 22)

Need-Based Aid Recipient Field 69

- Did the student receive any need-based aid?
  - If yes, at least one type of need-based aid must be reported.
  - If no, at least one type of non-need based aid must be reported.
  - See Appendix A of the manual for aid types.

FAFSA on File Field 70

- Does the student have a FAFSA on file?
- Most need-based aid recipients should have a FAFSA on file
  - Not required to report Workforce students without FAFSA (SBCTC Opp. Grant, Worker Retraining, etc.)
- Non-need based loan recipients may or may not have a FAFSA on file for 2012-2013

EDITS

Edits

- Edits help ensure data quality
- Edits are “softened” for non-need based aid recipients without a FAFSA

Non-Overrideable Edits

Page 40 in the manual – "Just can't be true" edits

- Invalid codes
- No financial aid
- Need-based without that type of aid
- Non-resident with SNG or other state aid
- Need-based student without a FAFSA

Overrideable Edits

Page 41-42 and field content (Appendix C) in the manual – "Really?" edits

- Amount of Need is zero with Need Based Aid
  - Budget changes with dropped credits
- Year In School for Aid Type (Grad PLUS Loan)
  - Student graduated mid year
- Date of Birth outside expected range

TIPS

Best Practices

- Start early
- Review the manual & training materials
- Use the URR informational reports to check for consistency & validity
- Call or email if you have questions or problems that are not addressed in the manual

USING THE WEB APPLICATION

Washington Student Achievement Council

Logon to the Secure Site

https://fortress.wa.gov/wsac/secure/login.asp

State of Washington [US] https://fortress.wa.gov/wsac/secure/login.asp

[MAIN MENU] allysonb@wsac.wa.gov [LOGOFF]

This Web site is a tool for authorized users only.

It is not designed for students, parents, or other members of the general public.

The HECB has updated our website to conform to Washington State Department of Information Services password requirements.

1) Passwords will expire after 120 days. You will then be required to select a new password

2) Passwords must be between 8 and 32 characters long

3) Passwords must contain characters from three of the following four categories: Uppercase, Lowercase, Numbers, Special Symbols (!@#$%^&*)

4) Passwords history will be tracked to prevent the re-use of passwords

Email Address: allysonb@wsac.wa.gov

Password: ••••••••

Login

Call (360)704-4153 if you're having problems logging in.

Don't have an account? Register Here.

*The Higher Education Coordinating Board (HECB) is now the Washington Student Achievement Council (WSAC).

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Click on Unit Record

Main Menu

- EOG - redirect to portal
- Future Teachers - redirect to portal
- SNG Interim Reporting Tool
- State Need Grant - redirect to portal
- State Work Study - redirect to portal
- Unit Record

HECB Internal Use Only Menu

- FAFSA Lookup
- Secure Site User Administration

Communications Menu

- All communications functionality has now been moved to the HECB portal website

Utilities Menu

- Change Your Password

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Review Main Menu

Data Entry
Add Record Level Data
Edit Record Level Data
Upload Data From a File
Edit Reports
Edit Report Listing by SSN
Edit Report Listing by Error Type
Edit Report Listing by Last Name
SNG Students Not Reported
Utilities
Erase All Data
View Instructional PDF

Informational Reports
Program Totals Report **
**Program Total Report takes a while to run, please be patient.
Residency Status Distribution
Race Distribution
Hispanic/Non Distribution
Gender Distribution
Dependency Status Distribution
Marital Status Distribution
Age Distribution
List of All Possible Edits

Finalize Your Report
Submit Your Unit Record to the HECB

Manually Enter Records

Data Entry

- Add Record Level Data
- Edit Record Level Data
- Upload Data From a File

Edit Reports

- Edit Report Listing by SSN
- Edit Report Listing by Error Type
- Edit Report Listing by Last Name
- SNG Students Not Reported

Utilities

- Erase All Data
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Informational Reports

- Program Totals Report **

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- Residency Status Distribution
- Race Distribution
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- List of All Possible Edits

Finalize Your Report

- Submit Your Unit Record to the HECB

Manually Enter Records (cont'd)

Use this screen to enter records, one student at a time. Make sure to save. This screen can also be used to edit student records after a file has been uploaded.

Unit Record Details					Save Student Record
SSN		Parent Contribution		First and Middle Initial	
Resident	SELECT ONE	Student Contribution		Institutional ID	
Fall Enroll	SELECT ONE	Pell Grant		Need Associated Disbursement	SELECT ONE
Winter Enroll	SELECT ONE	Federal SEOG		Disbursement AssociatedNeed	SELECT ONE
Spring Enroll	SELECT ONE	Federal Perkins Loan		Federal Academic Competitiveness Grant - Year 1	
Summer 1 Enroll	SELECT ONE	Federal Work Study		Federal Academic Competitiveness Grant - Year 2	

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Upload a CSV Data File

Data Entry
Add Record Level Data
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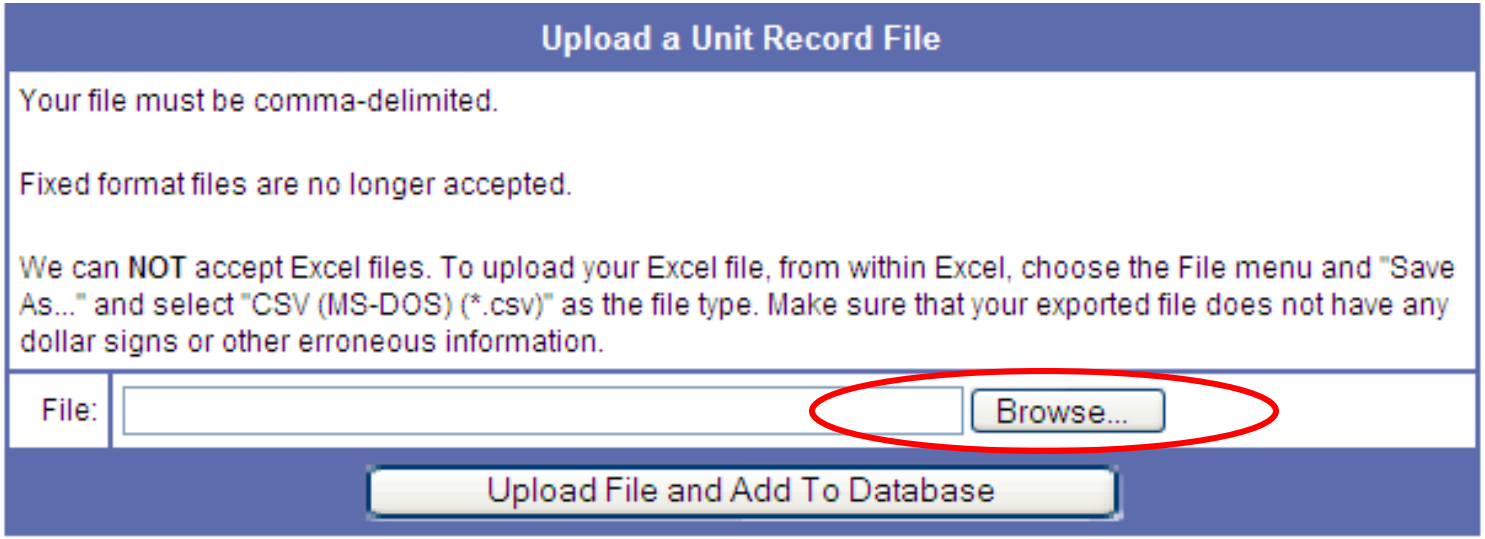
Finalize Your Report
Submit Your Unit Record to the HECB

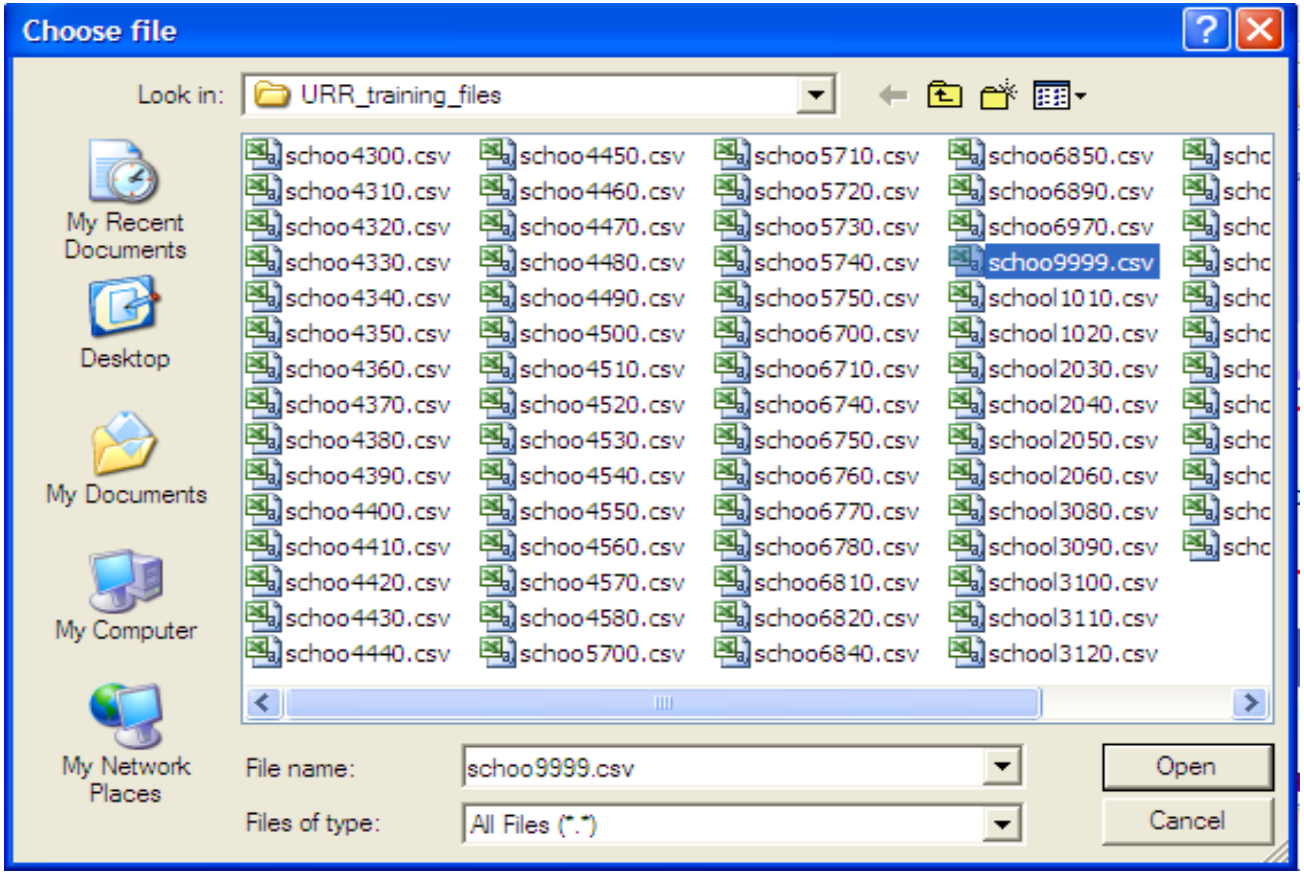
Upload a CSV Data File (cont'd)

Click on browse to locate the data file, which must be in csv format.



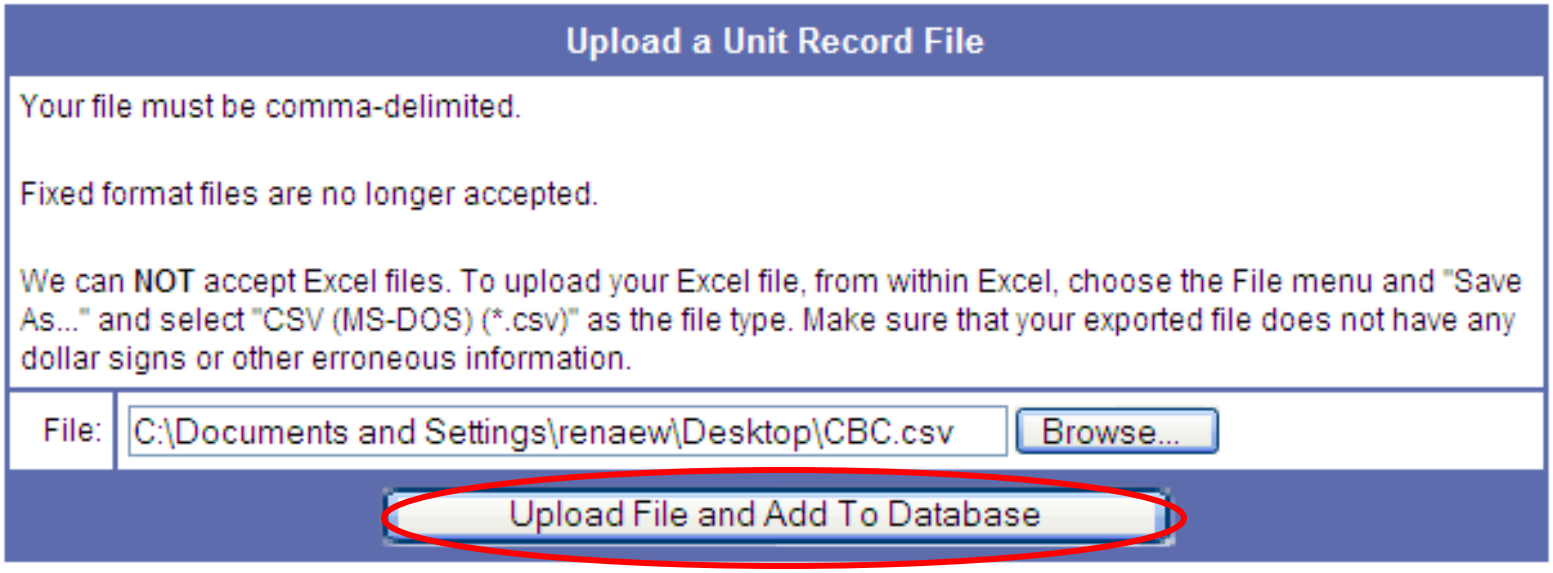
Upload a CSV Data File (cont'd)

Select your file from the appropriate directory.



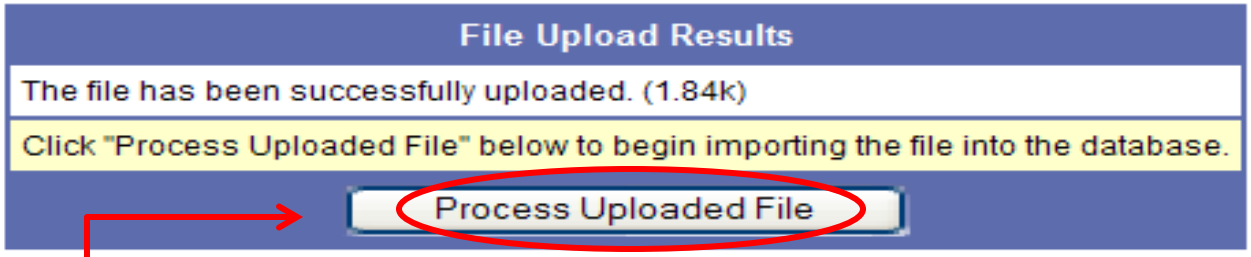
Upload a CSV Data File (cont'd)

Click on "Upload File and Add to Database" button

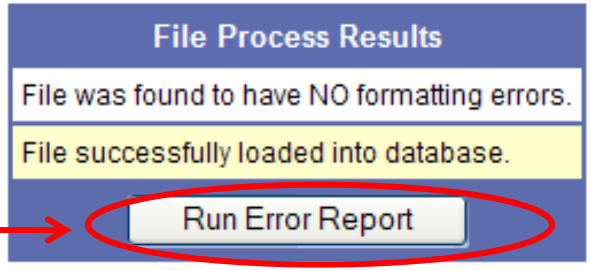


Upload a CSV Data File (cont'd)

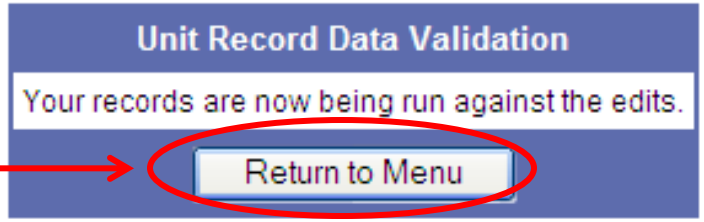
This screen will appear if no format errors exist.



Click on "Process Uploaded File" to load the file into the system.



Click on "Run Error Report" to check for additional errors.



Click on "Return to Menu" to begin resolving other errors.

Review Edits

View any of the 3 edit reports noted below to begin reviewing & correcting errors.

Data Entry
Add Record Level Data
Edit Record Level Data
Upload Data From a File
Edit Reports
Edit Report Listing by SSN
Edit Report Listing by Error Type
Edit Report Listing by Last Name
SNG Students Not Reported
Utilities
Erase All Data
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Informational Reports
Program Totals Report **
**Program Total Report takes a while to run, please be patient.
Residency Status Distribution
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List of All Possible Edits

Finalize Your Report
Submit Your Unit Record to the HECB

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Sample Edits

Records with Errors					
SSN	Student ID	Name	Error	Edit	Overrides
012345678		First G	Race indicator is set to TRUE, but no race information has been specified	Edits	Non
012345678		First G	Spring enrollement not entered	Edits	Non
012345678		First G	SNG Award not found in HECB records	Edits	Override
012345678		First G	Number of family in college outside expected range (1 - 20)	Edits	Override
123456789		Second CM	Married student, minimum family members must be at least 2	Edits	Override
456789717		Wilson We	Total aid reported is zero	Edits	Non
456789717		Wilson We	Need-Based Aid Recipient selected, but no need-based aid given	Edits	Non
678901234		Apple BB	Federal SMART Grant Year 4 outside expected range ($0 - $4,000)	Edits	Override

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Make Corrections

Data Validity Edits

This record is saved, but did not pass the Edits.

Married student, minimum family members must be at least 2. Override

Dependent Students must have family size of at least 2. Override

Unit Record Details

Save Student Record

G FIRST

SSN	012345678	Net Family Income	27515	SWS On Campus	1000
Resident	1: Washington Resident	Need Amount	39308	SWS Off Campus	0
Fall Enroll	1: Full-Time	Need Duration	11	SWS Total	1000
Winter Enroll	5: Not Enrolled	Parent Contribution	0	Ed Opp Grant	0
Spring Enroll	5: Not Enrolled	Student Contribution	416	3%/4% Tuition Fee Waiver	0

Make Corrections (cont'd)

Most edits can be identified by locating the fields highlighted in pink. See No. of Family Members below (bottom left).

Race	6: White	Nurse/Health Loans	0	Outside Scholarships	0
Asian/Pacific Islander	: Not Asian/Pacific Isl	Fed Sub Stafford Loan	7500	Other Agency Assistance	0
Hispanic	9: Unknown/No Response	Fed PLUS/Unsub Stafford Loans	0	Age Youngest Child	1
Dependant Status	1: Dependent	SNG	6000	Impaired	1: Yes
Maritial Status	2: Married		Last Name	FIRST	
No. Of Family Members	1		First/Middle Initial	G	

Save Student Record

Delete This Record | View Error Listing | Return to Menu

Override Edits

Some edits can be overridden by submitting an explanation. Providing adequate details here can reduce the number of questions from Council staff.

Error Override Details	
Record:	345678901 -- Third, R
Error:	Total Family Income outside expected range (greater than $350,000)
Reason:	Income data has been verified.
Note:	Provide a brief explanation of your data for this edit error.
	Override Edit

Your override has been saved.

Return to Errors

Next Overrideable Record

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Review Informational Reports

Review each of these reports thoroughly before doing the final submission. These reports can help identify errors & reduce the number of questions from Council staff.

Informational Reports
Program Totals Report **
**Program Total Report takes a while to run, please be patient.
Residency Status Distribution
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List of All Possible Edits

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Totals Report

Review program totals and percent changes from the previous year to identify errors in reporting. Large percentage changes may indicate reporting errors.

Institutional Totals												
Aid	UR04-05 Dollars	UR05-06 Dollars	UR06-07 Dollars	UR07-08 Dollars	UR08-09 Dollars	Change 07-08/08-09	UR04-05 Recipients	UR05-06 Recipients	UR06-07 Recipients	UR07-08 Recipients	UR08-09 Recipients	Change 07-08/08-09
Federal Aid												
AcademicCompetitivenessGrantYear1	$0.00	$0.00	$490,711.00	$561,837.00	$546,019.00	-2.82%	0	0	725	826	854	3.39%
AcademicCompetitivenessGrantYear2	$0.00	$0.00	$409,502.00	$398,328.00	$542,047.00	36.08%	0	0	426	401	569	41.90%
Federal Workstudy	$2,139,352.00	$2,359,057.00	$2,458,868.00	$2,085,449.00	$1,615,700.00	-22.53%	909	949	992	826	634	-23.24%
FederalGradPLUSLoan	$0.00	$0.00	$0.00	$0.00	$15,225,545.00	100.00%	0	0	0	0	1320	100.00%
FederalParentPLUSLoan	$0.00	$0.00	$0.00	$0.00	$28,503,894.00	100.00%	0	0	0	0	2663	100.00%
FederalSMARTGrantYear3	$0.00	$0.00	$757,248.00	$932,739.00	$951,963.00	2.06%	0	0	338	369	385	4.34%
FederalSMARTGrantYear4	$0.00	$0.00	$1,029,223.00	$1,110,655.00	$1,180,444.00	6.28%	0	0	400	415	453	9.16%
FederalTEACHGrant	$0.00	$0.00	$0.00	$0.00	$42,079.00	100.00%	0	0	0	0	17	100.00%
Nurse Health Loans	$1,818,761.00	$1,834,004.00	$1,294,854.00	$2,329,736.00	$1,701,506.00	-26.97%	231	218	174	259	245	-5.41%
Nurse Scholarship	$0.00	$0.00	$0.00	$0.00	$0.00	0.00%	0	0	0	0	0	0.00%
Pell	$18,112,080.00	$17,083,030.00	$17,468,957.00	$20,257,555.00	$24,531,318.00	21.10%	6859	6446	6611	7095	7458	5.12%
Perkins	$14,893,067.00	$14,048,652.00	$12,845,403.00	$7,806,425.00	$6,750,167.00	-13.53%	4501	4507	4083	2548	3007	18.01%
PLUS	$58,455,240.00	$60,907,629.00	$74,672,321.00	$82,485,742.00	$0.00	-100.00%	7716	7641	8075	8077	0	-100.00%
SEOG	$3,114,447.00	$2,762,912.00	$2,902,334.00	$2,873,297.00	$2,803,729.00	-2.42%	4646	4458	4510	4801	4825	0.50%
Stafford	$63,541,368.00	$60,635,488.00	$63,524,558.00	$67,126,928.00	$73,639,084.00	9.70%	12911	12407	12840	12949	14038	8.41%

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Totals Report (cont'd)

Compare Percentage Changes – are there significant differences?

Aid
Federal Aid
AcademicCompetitivenessGrantYear1
AcademicCompetitivenessGrantYear2
Federal Workstudy
FederalGradPLUSLoan
FederalParentPLUSLoan
FederalSMARTGrantYear3
FederalSMARTGrantYear4
FederalTEACHGrant
Nurse Health Loans
Nurse Scholarship
Pell
Perkins
PLUS
SEOG
Stafford

Institutional/Other Aid
Institutional Grants, Etc.
Institutional Off Campus Employment
NonNeedBasedWaivers
Other Agency Assistance
Other Loans
Outside Scholarships
ThreeAndOneHalfPercentGrantsAndScholarships

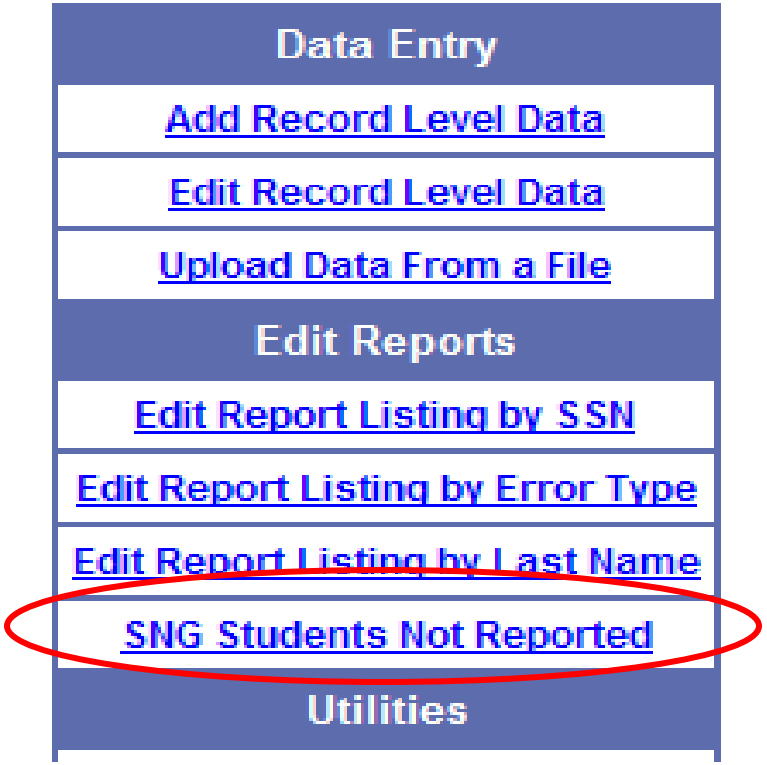
Institutional Totals		
UR09-10 Dollars	UR10-11 Dollars	Change 09-10/10-11
State Aid		
CollegeBoundScholarship		
EOG		
GETReadyForMathAndScience		
Need Based Waivers		
Other State Gift Assistance		
PassportToCollege		
SBCTCOpportunityGrant		
State Need Grant		
State Work Study Off Campus		
State Work Study On Campus		
Workforce Training		

Reports Identify Errors

Gender Distribution						
Gender	UR06-07	UR07-08	UR08-09	UR09-10	Change	Visual
Male	1021	1101	1071	1549	44.63%	
Female	1564	1560	1563	1065	-31.86%	
Total:	2585	2661	2634	2614	-0.76%	

SNG and CBS Discrepancies

Some SNG and College Bound discrepancies do NOT show up in the list with other errors. They can only be viewed by clicking on the link circled below. Reviewing these errors thoroughly & correcting discrepancies can reduce the number of questions from Council staff.



SNG and CBS Discrepancies (cont'd)

- SNG or College Bound payments which have no corresponding record on Final Interim Report
- Final Interim Report records of payments with no corresponding record in Unit Record
- Different award amounts in Unit Record compared to SNG Final Interim Report

Address SNG discrepancies

- Review "SNG Students Not Reported"
- Identify the cause of each discrepancy
- Make any necessary corrections
- Email Council staff at unitrecord@wsac.wa.gov with an explanation regarding any remaining discrepancies

Am I done yet? No…

When you select "Submit Your Unit Record to WSAC" one of two screens will appear. If the report contains errors, the screen below is displayed.
The number of Total Errors must equal zero before a report can be submitted. All errors must be corrected or overridden before the system will accept the file. Also check to ensure the Total Records matches the number of records in the original data file.

Submit Unit Record	
Total Records:	2614
Total Errors:	2
Total Overrides:	1
You cannot submit a unit record that has not passed Edits (or the edits have been overrridden).	

Am I done now? Almost…

The screen below will appear when "Submit Your Unit Record to the WSAC" is selected from the main menu. Fill in contact information for the financial aid staff & for technical support staff, if applicable. Click on the button at the bottom of the screen to upload data into the system.

Submit Unit Record	
Total Records:	255
Total Errors:	0
Person at this institution to contact for questions related to financial aid data is:	
Name:	School_FA_Contact
Email:	FA_info@school.edu
Phone:	360-123-456
Person to contact for techical question related to the data file and layout is:	
Name:	School_tech_contact
Email:	TECH_info@...
Phone:	360-789-1011
Submit Your Unit Record to the HECB	

Washington Student Achievement Council

Are you done yet? Yes!

When you get this screen, you have successfully submitted your data to the Student Achievement Council for review. If you need to make corrections, contact staff to have your file unsubmitted or deleted.

You have already submitted your report to the HECB.
It cannot be submitted again or modified at this point.
If you have any questions, please contact
Allyson Burns at:
UnitRecord@wsac.wa.gov **or (360) 753-7820**

Informational Reports
Program Totals Report **
**Program Total Report takes a while to run, please be patient.
Residency Status Distribution
Gender Distribution
Dependency Status Distribution
Marital Status Distribution
Age Distribution
List of All Possible Edits

Preparing for 2013-14 Reporting

- Become familiar with requirements of the 2012-13 Unit Record Report Portal Manual
- All financial aid received must be reported for each of five terms (even if zero '0')
- WSAC Portal system will offer improvements in institutional reporting and editing

Where to go for help

- Manuals are available online at:

  http://www.wsac.wa.gov/ProgramAdministration/FinancialAid/UnitRecord

- Contact Washington Student Achievement Council staff at unitrecord@wsac.wa.gov

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