Unit Record Report
Submitting the 2016-17 Report Via the Portal

Training Webinar Presentation
August 3, 2017
Council Staff on the Webinar

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

August 14:  Unit Record Report (URR) application opens
October 20:  Finalized report due
October/November:  WSAC analysis
December:  Reports to policy makers
January 2018:  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

• 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
Portal CSV File Submission

• Building a CSV file for submission

  • Report only students who received financial aid based on the 2016-17 FAFSA (or WASFA) 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 – 2016-17 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

• 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 2016-17 FAFSA (or WASFA)
  • Report on next year’s URR all financial aid received based on the 2017-18 FAFSA (or WASFA)
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) **
  • 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

• Need-Based Recipients – Other Programs

  • Federal TEACH Grant
  • Federal Health Professional Scholarships & Grants
  • Federal Health Professional Loans
  • Opportunity Scholarship
  • SBCTC Opportunity Grant
  • Other State Funded Assistance
  • Worker Retraining Program Funds
  • 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 for your recipients.

• Should be reported as WorkForceTrainingFunds
Programs to Report

• 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.
Changes for 2016-17 Unit Record Report Portal

• Refer to Page iii in the Manual

• Cost of Attendance (COA) and Tuition Waivers – Requesting assistance this year to report full assessed tuition amounts in COA before application of tuition waiver(s). This will be required for 2017-18 URR. Report waivers in appropriate category (i.e., Need- or Non-Need Based Institutional Gift Aid).

• Consistency with other WSAC Reporting
  
  • SNG Unserved on the Final Interim Report will be compared with URR records. NOTE: Procedure has changed for return of annotated unmatched Unserved list.

  • Family Size, Number in College, and Family Income – Overrideable edit if URR does not match CSAW reporting.

  • Expected Family Contribution – Report using Federal Methodology, not Institutional Methodology
Changes for 2016-17 Unit Record Report Portal

• **Student Teaching Grant** - New program with 2016-17 disbursements. Report as “OtherStateFundedGiftAssistance”

• **Teacher Shortage Conditional Grant** – Expect new program for 2017-18.
## Valid Input Ranges – Changes for 2016-17

<table>
<thead>
<tr>
<th>Category</th>
<th>Old Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family Income</td>
<td>-300000 to 600000</td>
<td>No change</td>
</tr>
<tr>
<td>Cost of Attendance</td>
<td>0 to 250000</td>
<td>No change</td>
</tr>
<tr>
<td>Expected Family Contribution</td>
<td>0 to 250000</td>
<td>No change</td>
</tr>
<tr>
<td>Need Amount</td>
<td>0 to 250000</td>
<td>No change</td>
</tr>
<tr>
<td>Federal Pell Grant</td>
<td>0 to 5775</td>
<td>0 to 5815</td>
</tr>
<tr>
<td>Federal TEACH Grant</td>
<td>0 to 99999</td>
<td>0 to 4000</td>
</tr>
<tr>
<td>Federal Perkins Loan</td>
<td>0 to 8500</td>
<td>0 to 12000</td>
</tr>
<tr>
<td>Federal Direct Subsidized Loans</td>
<td>0 to 20000</td>
<td>No change</td>
</tr>
<tr>
<td>Federal Direct Unsubsidized Loans</td>
<td>0 to 90000</td>
<td>No change</td>
</tr>
<tr>
<td>College Bound Scholarship</td>
<td>0 to 18000</td>
<td>0 to 15000</td>
</tr>
<tr>
<td>Opportunity Scholarship</td>
<td>0 to 99999</td>
<td>0 to 12000</td>
</tr>
</tbody>
</table>
Reporting Requirements

• For all financial aid recipients reported

  • Required fields:
    • SSN
    • First Name
    • Last Name
    • Gender
    • Is State Resident
    • Year In School
    • Financial Aid per term – even if ‘0’
    • 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 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)
Reporting Requirements

• When to include summer aid in your reporting

  • Review Chapter 2 of Manual for detailed information
  • Summer aid reported are amounts received based on 2016-17 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 2016-17 FAFSA & WASFA filers
  - 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

• 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

• SSNs of Passport to College recipients will be compared to recipient Portal records

• Discrepancies will show on edit reports
<table>
<thead>
<tr>
<th>Year in School</th>
<th>Required for all recipients. Report the status as of the beginning of the term of the recipient’s last financial aid disbursement for the 2015-16 year.</th>
</tr>
</thead>
<tbody>
<tr>
<td>‘1’ or ‘Freshman/1st Year’</td>
<td></td>
</tr>
<tr>
<td>‘2’ or ‘Sophomore/2nd Year’</td>
<td></td>
</tr>
<tr>
<td>‘3’ or ‘Junior/3rd Year’</td>
<td></td>
</tr>
<tr>
<td>‘4’ or ‘Senior/4th Year’</td>
<td></td>
</tr>
<tr>
<td>‘5’ or Unclassified/5th Year’</td>
<td></td>
</tr>
<tr>
<td>‘6’ or ‘Graduate’</td>
<td></td>
</tr>
<tr>
<td>‘7’ or ‘Professional’</td>
<td></td>
</tr>
<tr>
<td>‘8’ or ‘Other’</td>
<td></td>
</tr>
</tbody>
</table>
Year in School – Things to Consider

• 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

• 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 2016-17 FAFSA or WASFA

• Often will be the 2015 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
Expected Family Contribution

• Report the Expected Family Contribution (EFC)

  • Often will be the Federal Methodology calculation produced by U.S. Department of Education based on the 2016-17 FAFSA, or WASFA

  • 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

- 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

<table>
<thead>
<tr>
<th>Undergraduate Enrollment Status</th>
<th>Credits</th>
<th>Scheduled Clock Hours</th>
<th>URR Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Enrolled</td>
<td>n/a</td>
<td>n/a</td>
<td>‘0’ or ‘Not enrolled’</td>
</tr>
<tr>
<td>Full-Time</td>
<td>12.0 or more</td>
<td>300 or more *</td>
<td>‘1’ or ‘Full time’</td>
</tr>
<tr>
<td>Half-Time</td>
<td>6.0 – 8.9</td>
<td>150 – 224</td>
<td>‘2’ or ‘Half time’</td>
</tr>
<tr>
<td>Three-Quarter Time</td>
<td>9.0 – 11.9</td>
<td>225 – 299</td>
<td>‘3’ or ‘3/4 time’</td>
</tr>
<tr>
<td>Less Than Half-Time</td>
<td>3.0 – 5.9</td>
<td>75 – 149</td>
<td>‘5’ or ‘&lt; Half time’</td>
</tr>
</tbody>
</table>

*Typically clock hour term awards are for full-time enrollment status, except that the final term may be paid for part-time enrollment status.*
Approximate Term Date Ranges for Clock-Hour Institutions

<table>
<thead>
<tr>
<th>Term</th>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer 1</td>
<td>July 1, 2016</td>
<td>September 11, 2016</td>
</tr>
<tr>
<td>Fall</td>
<td>September 12, 2016</td>
<td>November 22, 2016</td>
</tr>
<tr>
<td>Winter</td>
<td>November 23, 2016</td>
<td>February 5, 2017</td>
</tr>
<tr>
<td>Spring</td>
<td>February 6, 2017</td>
<td>April 18, 2017</td>
</tr>
<tr>
<td>Summer 2</td>
<td>April 19, 2017</td>
<td>June 30, 2017</td>
</tr>
</tbody>
</table>
State Need Grant, College Bound Scholarship, and Passport to College

• Report the final awards received by the student

• The Unit Record Reporting tool checks against Final Interim Report – Critical

• Review the “SNG, CBS, & Passport Differences Report” to verify all SNG, CBS, and Passport recipients and awards are correctly reported
Reporting of tuition waiver dollars for SNG and CBS recipients

• To the extent possible, institutions are encouraged to report full or partial tuition waivers received by their needy students

• Requested for 2016-17 and required for 2017-18
  • This helps state data show more accurately 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
  • 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 2016-17 FAFSA or WASFA

  • Non-Need Based Institutional Gift Aid – all institutional grants, scholarships, and/or waivers awarded without regard to the FAFSA or WASFA
Other State Funded Gift Assistance

• Report sources of state aid not reported elsewhere. Examples include:

  • American Indian Endowed Scholarship
  • Washington Scholars
  • Student Teaching Residency Grant
EDITS
Edits to Ensure Data Quality

• Edits help ensure data quality

• Edits are “softer” for students receiving only Non-Need Based Federal Loans

• FAFSA related edits also are “softer” for students not receiving FAFSA (or WASFA) required aid types
Edits that Prevent File Upload

• Refer to Appendix C (page 44) 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!
Non-Overrideable Edit Examples

• Refer to Appendix C (page 45 - 47) in the Manual
  
  • Total Aid Reported is Zero
  
  • Non-resident with SNG or other state aid
  
  • Number in College greater than Family Size
Overrideable Edit Examples

- Refer to Appendix C (pages 45 – 47) – 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 college
Tips and Best Practices

- Upload your CSV file early – don’t wait for the deadline!
- Review 2016-17 URR Manual and training materials, and test upload using the Portal training environment:
  
  https://fortress.wa.gov/wsac/portaltraining/

  (Data entered is temporary; information clears overnight)
- Use URR informational reports to check for consistency & validity
- CTCs – Review SBCTC 2016-17 URR Manual when available
- Contact us with questions or problems not addressed in Manual
USING THE WEB APPLICATION
Logon to the Portal
https://fortress.wa.gov/wsac/portal/
In the Programs menu, click on Unit Record.
• 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

1. Browse to select a CSV File.
2. Upload.

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

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.
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 the file, correct the error, and re-upload.
Discard Upload button:

- Interrupts upload and deletes the defective file mid-process
- Alleviates long wait time associated with processing of high volume file upload before discard is possible
- Discard button also remains available at same traditional screen intervals
Once the file upload is complete, verify the total number of students and the number of students by year in school. Proceed to Edits.
Processing Edits

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

Unit Record Edits

<table>
<thead>
<tr>
<th>SSN</th>
<th>Student ID</th>
<th>Last</th>
<th>First</th>
<th>Middle</th>
<th>Error</th>
<th>Overridable</th>
</tr>
</thead>
<tbody>
<tr>
<td>9999999559</td>
<td>Stu0484</td>
<td>Smith</td>
<td>A</td>
<td></td>
<td>Student not Enrolled</td>
<td>Overrideable</td>
</tr>
<tr>
<td>9999999560</td>
<td>Stu0483</td>
<td>Johnson</td>
<td>D</td>
<td>D</td>
<td>College Bound Scholarship award not found in WSAC records</td>
<td>Overrideable</td>
</tr>
</tbody>
</table>
Filter by Edit Type, or Sort by SSN, Student ID, Name, Error message, or Overrideable status.

<table>
<thead>
<tr>
<th>SSN</th>
<th>Student ID</th>
<th>Last</th>
<th>First</th>
<th>Middle</th>
<th>Error</th>
<th>Overrideable</th>
</tr>
</thead>
<tbody>
<tr>
<td>999999955</td>
<td>STU0484</td>
<td>Smith</td>
<td>K</td>
<td></td>
<td>Date Of Birth outside expected range</td>
<td>Overridden</td>
</tr>
<tr>
<td>999999955</td>
<td>STU0484</td>
<td>Smith</td>
<td>K</td>
<td></td>
<td>Student Id Number must be at least 9 characters for publics</td>
<td>Overrideable</td>
</tr>
<tr>
<td>999999955</td>
<td>STU0484</td>
<td>Smith</td>
<td>K</td>
<td></td>
<td>Student not Enrolled</td>
<td>Overrideable</td>
</tr>
<tr>
<td>999999955</td>
<td>STU0484</td>
<td>Smith</td>
<td>K</td>
<td></td>
<td>Total aid reported is zero</td>
<td></td>
</tr>
</tbody>
</table>
Processing Edits

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

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

<table>
<thead>
<tr>
<th>SSN</th>
<th>Student ID</th>
<th>Last</th>
<th>First</th>
<th>Middle</th>
<th>Error</th>
<th>Overridable</th>
</tr>
</thead>
<tbody>
<tr>
<td>999999559</td>
<td>Stu0484</td>
<td>Smith</td>
<td>A</td>
<td></td>
<td>Student not Enrolled</td>
<td>Overrideable</td>
</tr>
<tr>
<td>999999999</td>
<td>Stu0483</td>
<td>Johnson</td>
<td>D</td>
<td>D</td>
<td>College Bound Scholarship award not found in WSAC records</td>
<td>Overrideable</td>
</tr>
</tbody>
</table>
Processing Edits

Fall term Enrollment Status cannot be Not Enrolled when Fall term aid has been reported
 State Need Grant Amount Differs From Interim Report (interim: 0, unit record: 659)
 State Need Grant award not found in WSAC Interim Report

SSN or WASFA Id: 101-11-1111
Last Name: Adrenaline
Date of Birth: 2/16/1985
Gender: Male

Institution Student Id: 
First Name: Rush
Is Dependent: No / false
Family Size: 1
Is State Resident: Yes / true

Cost of Attendance: 38392
Expected Family Contribution: 0
Need Amount: 38392
Total Family Income: 22122
Need Duration (months): 0
Processing Edits

Edit the data or override with a reason.

<table>
<thead>
<tr>
<th>Enrollment Status</th>
<th>Summer 1</th>
<th>Fall</th>
<th>Winter</th>
<th>Spring</th>
<th>Summer 2</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Not enrolled</td>
<td>Full time</td>
<td>Full time</td>
<td>3/4 time</td>
<td>Full time</td>
<td></td>
</tr>
<tr>
<td>Federal Pell Grant</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>5730</td>
</tr>
<tr>
<td>Federal SEOG</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>900</td>
</tr>
<tr>
<td>Federal TEACH Grant</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Federal Nursing Scholarships</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Federal Work Study</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Federal Perkins Loan</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Federal Nursing Health Loans</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Federal Direct Subsidized Loans</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>3500</td>
</tr>
<tr>
<td>Federal Direct Unsubsidized Loans</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Federal Parent PLUS Loans</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Federal Grad PLUS Loans</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>State Need Grant</td>
<td>0</td>
<td>0</td>
<td>859</td>
<td>0</td>
<td>0</td>
<td>859</td>
</tr>
<tr>
<td>College Bound Scholarship</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
Processing Edits

1. If overriding, enter reason in the pop-up box and click “save.”

2. Hover mouse over the information icon to review the override reason.
Checking for Missing Data
Previously Reported in WSAC Records

Click “Show SNG/CBS/PTC discrepancies report” from the Edit page
Discrepancies already overridden are flagged with a ‘Y’ to differentiate those records from discrepancies not yet addressed.
Checking for Missing Data Previously Reported in WSAC Records

If additional discrepancies exist, click “Download differences to .csv” to review a separate file and identify missing student records that must be added or corrected.
To add missing data to an existing record in your upload file, “Search” to locate and edit the student record.
Adding Data for Record Missing from URR Upload

To add a missing student record, click “Add a new unit record to the report” from the Edits page.

![Image of Edits page showing how to add a new unit record to the report]
Adding Data for Record Missing from URR Upload

This will open a new, blank record. Complete the fields in the “Student Demographics and Need” and “Student Aid” tabs. Remember to “Save” your work.
All aid must be reported by term. If the term is not applicable, report “Not enrolled” and ‘0’ funding (typically).
Missing SNG Unserved Students Report – new procedure

### Review the SNG, CBS & Passport differences below, then Click to Continue

Edit or add student records if necessary. A ‘Y’ in the Override column denotes an addressed edit. You may be asked to explain significant discrepancies before your report is finalized by WSAC.

Discrepancies due to an SSN mismatch, originating in the Final Interim Report or Portal records instead of the URR, cannot be corrected by the institution without WSAC assistance. Click on the “Send an Email” button to correct the SSN.

### State Need Grant College Bound Scholarship Passport To College Missing SNG Unserved Students

Download the .csv file and review for accuracy as described here, then return the annotated .csv file to WSAC URR team as a secure Portal email attachment, using the “Send an Email” button in the upper half of this screen.

For any students who received need-based aid or federal loan assistance, click “Return to the Edit List” and manually add unit records for those students; then run an updated .csv to remove them from the Missing Unserved list.

For students whose term enrollment statuses ALL are accurate as shown AND no need-based aid or federal loan assistance was received, enter “Yes” in the “Indicate Yes If All Terms OK” column. For remaining students, enter the actual enrollment status (i.e., Full time; 3/4 time; Half time; LTHT; or, Not enrolled) in the “Verify” column corresponding only to the positive enrollment terms shown. Leave blank the “Verify” column corresponding to a term shown as “Not enrolled.” Do not overwrite or edit the original download text. Additional notes may be placed in the ‘Comments’ column.

<table>
<thead>
<tr>
<th>SSN</th>
<th>Last</th>
<th>First</th>
<th>SID</th>
<th>Unserved Summer1</th>
<th>Unserved Fall</th>
<th>Unserved Winter</th>
<th>Unserved Spring</th>
<th>Unserved Summer2</th>
</tr>
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<tr>
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<td>Half time</td>
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<td>Full time</td>
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### Example of Missing SNG Unserved Report

**Example: SNG Missing Unserved .CSV report on download**

| A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S |
| 1 | InstitutionName | AcademicYear | FirstName | MiddleInitial | LastName | Indicate_Yes_i | Summer1Unserved | Summer1Verify | FallUnserved | FallVerify | WinterUnserved | WinterVerify | SpringUnserved | SpringVerify | Summer2Unserved | Summer2Verify | CommentsSection |
| 2 | Example University | 2016-2017 | Aaron | N | Andrews | OK | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | |
| 3 | Example University | 2016-2017 | Betty | C | Bradley | OK | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | |
| 4 | Example University | 2016-2017 | Cathy | R | Calhorn | OK | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | |
| 5 | Example University | 2016-2017 | Dean | A | Dandy | OK | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | |
| 6 | Example University | 2016-2017 | Ella | L | Emerson | OK | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | |
| 7 | Example University | 2016-2017 | Fiona | M | Friendly | OK | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | |
| 8 | Example University | 2016-2017 | Greta | V | Grandy | OK | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | |

### Example: Completed SNG Missing Unserved download report with annotations

| A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S |
| 1 | InstitutionName | AcademicYear | FirstName | MiddleInitial | LastName | Indicate_Yes_i | Summer1Unserved | Summer1Verify | FallUnserved | FallVerify | WinterUnserved | WinterVerify | SpringUnserved | SpringVerify | Summer2Unserved | Summer2Verify | CommentsSection |
| 2 | Example University | 2016-2017 | Aaron | N | Andrews | OK | Not enrolled | Full time | Not enrolled | Full time | Half time | Not enrolled | Full time | Not enrolled | Not enrolled | Not enrolled | |
| 3 | Example University | 2016-2017 | Betty | C | Bradley | OK | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Not enrolled | |
| 4 | Example University | 2016-2017 | Cathy | R | Calhorn | | Yes | Not enrolled | Not enrolled | Not enrolled | Not enrolled | Not enrolled | Not enrolled | Not enrolled | Not enrolled | Not enrolled | |
| 5 | Example University | 2016-2017 | Dean | A | Dandy | OK | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Not enrolled | Not enrolled | Not enrolled | |
| 6 | Example University | 2016-2017 | Ella | L | Emerson | OK | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Full time | Not enrolled | Not enrolled | Not enrolled | Not enrolled | |
| 7 | Example University | 2016-2017 | Fiona | M | Friendly | OK | Not enrolled | Full time | Not enrolled | Full time | Half time | Not enrolled | Full time | Not enrolled | Not enrolled | Not enrolled | |
| 8 | Example University | 2016-2017 | Greta | V | Grandy | OK | Not enrolled | Full time | Not enrolled | Full time | Half time | Not enrolled | Full time | Not enrolled | Not enrolled | Not enrolled | |
Return completed “Missing SNG Unserved” Report as a secure Portal email attachment to WSAC

Review the SNG, CBS & Passport differences below, then **Click to Continue**

Edit or add student records if necessary. An ‘Y’ in the Override column denotes an addressed edit. You may be asked to explain significant discrepancies before your report is finalized by WSAC.

Discrepancies due to an SSN mismatch, originating in the Final Intern Report or Portal records instead of the URR, cannot be corrected by the institution without WSAC assistance. Click on the “Send an Email” button to correct the SSN.

**State Need Grant**  **College Bound Scholarship**  **Support To College**  **Missing SNG Unserved Students**

Download the .csv file and review for accuracy as described here, then return the annotated .csv file to WSAC URR team as a secure Portal email attachment, using the “Send an Email” button in the upper half of this screen.

For any students who received need-based aid or federal loan assistance, click “Return to the Edit List” and manually add unit records for those students, then run an updated .csv, to remove them from the Missing Unserved list.

For students whose term enrollment statuses ALL are accurate as shown AND no need-based aid or federal loan assistance was received, enter “Yes” in the “Indicate Yes if All Terms OK” column. For remaining students, enter the actual enrollment status (i.e., Full time; 3/4 time; Half time; LTHT; or, Not enrolled) in the “Verify” column corresponding only to the positive enrollment terms shown. Leave blank the “Verify” column corresponding to a term shown as “Not enrolled.” Do not overwrite or edit the original download text. Additional notes may be placed in the “Comments” column.

### Missing SNG Unserved Students

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Submitting the Report

SSN Mismatches: Note that SSN mismatches originating outside of URR require WSAC assistance. Press “Send an Email” to securely notify WSAC.

Press “Return to the Edit List” or “Search” to make additional corrections, or “Click to Continue” if all errors have been fixed or overridden.
Submitting the Report

Review the preliminary Program Totals Report for missing information or unusual patterns.

Press “Click to Continue”
Submitting the Report

Click “Submit Your Unit Record Report” to submit your report.

The page at portaltraining says:

Once submitted you will no longer be able to update this report. Do you wish to continue?

[OK] [Cancel]
Before Exiting the URR Portal

1. Successful submission takes you to a Confirmation/Reports page.

2. Review and print available URR Summary Reports.
Other URR Summary Reports

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

- **Program Totals Report**: Details the total number of all reported students and aid amounts for the last four years.
- **Demographic Distribution Reports**: Shows student demographic changes for all reported students over the last four years.
- **SNG, College Bound & Passport Differences**: Shows differences between Unit Record data and WSAC Payments and/or Intern Reporting.

**Profile Reports** - These reports allow your institution to compare the assistance your students have received from these programs to all institutions in Washington state and also to all institutions in your institutions sector. The comparison reports for this year will be available in January 2019. To view previous year comparison reports, select a previous year from the options shown above.

- Need-Based Aid Recipients
- State Work Study Recipients
- State Need Grant Recipients
- College Bound Scholarship Recipients
Where to go for help?

• Review the 2016-17 URR Manual, available online at:
  http://www.wsac.wa.gov/unit-record

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

<table>
<thead>
<tr>
<th>Ann Voyles</th>
<th>Carla Idohl-Corwin</th>
</tr>
</thead>
<tbody>
<tr>
<td>360-753-7843</td>
<td>360-753-7847</td>
</tr>
<tr>
<td><a href="mailto:annv@wsac.wa.gov">annv@wsac.wa.gov</a></td>
<td><a href="mailto:carlai@wsac.wa.gov">carlai@wsac.wa.gov</a></td>
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