Interim Helpful Hints

First Interim Helpful Hint #14 – SACS Web System – First & Subsequent Imports

11/5/26

First Import

1. Log in to the SACS Web System and select Import → Single Import.
2. Select the CompassEdu extract file.
3. Use Type of Import: Other, Reporting Period: First Interim, and Dataset Format: SACS.
4. Upload and review the pre-scan results.

Subsequent Imports

Open the existing First Interim dataset and use the import function within that dataset. Use the overwrite option that deletes only the forms/funds/supplements being imported so existing manually completed data is not unnecessarily replaced.

Reminder: Be aware of SACS form/submission locking. Users with the appropriate management role can unlock forms when changes are required.

Additional Resource: Refer to the 2026-27 First Interim Reporting presentation, slides 15–22.

If you need assistance with anything related to Interim Reports, please contact your Business Services Advisor