# Excel for Data Submissions/The Record Checker Tool (Part 2)

Data Submissions Recorded July 2021





COLORADO CHARTER SCHOOL INSTITUTE

## Record Checker Tool



#### Purpose of the Record Checker Tool

The purpose of the Record Checker is for schools to review their initially extracted files prior to initial submittal. The tool is an Excel template file where initial extract files can be pasted and reviewed for accuracy.

#### The overall goal of the tool is to:

- Identify errors and correct prior to submittal
- Fewer errors received upon initial submittal
- Fewer submissions until error clearance
- Collection errors cleared earlier in the process

Available for the Student, SPED and HR Interchanges!

#### PART II: Record Checker Tool

The Record Check Tool has been updated for the 20-21 October Count. If you had downloaded the Record Checker Template for the 19-20 EOY collection, you will need to download the updated Record Checker Template in order for the results to be accurate.

#### Use this tool at least once two days prior to the October Count Initial Submission deadline (September 3<sup>rd</sup> for 2020). Detailed instructions follow below and you can also view a recorded training at <a href="https://resources.csi.state.co.us/record-checker-walk-through/">https://resources.csi.state.co.us/record-checker-walk-through/</a>

 $\hfill\square$  Download Record Checker Tool template from the October Count website, under the Validations heading.

- Extract an SD and SSA file from your SIS.
- Copy and Paste data into the corresponding tabs.
- Highlighted cells indicate potential errors. Review this data in your SIS and update if needed.
- Repeat this process until errors are clear

#### Purpose

The Record Checker Tool is an Excel template that helps schools to quickly identify missing data and potential errors by highlighting data cells that could cause errors (see screen shot on following page).

The Record Checker Tool is one downloadable Excel file that can be used to find errors on both the Student Demographic (SD) and Student School Association (SSA) files <u>prior</u> to initial submission to CSI. While the Record Checker Tool cannot flag every possible potential error (examples listed below), using it in conjunction with the Data Validation Strategies Checklist, found on the End of Year and October Count website, should greatly reduce errors upon initial submission to CSI. Fewer errors leads to fewer submissions needed to achieve error clearance, and less time spent on the overall collection.

This tool can be used for both the End of Year and October Count collections. While CSI encourages schools to use this tool prior to the initial submittal to CSI, schools are welcome to use this tool prior to any submittal to CSI, particularly during the October Count collection if students have been added to the SIS after the initial submittal to CSI. The instructions below describe the steps necessary to utilize this resource successfully.

\*\*\*This process automates many of the processes described in Part 1\*\*\*



#### **Record Checker Instruction Overview**

Follow these steps to complete a review on initial data files:

- 1. Extract the applicable Interchange files directly from your schools SIS or Plan Management System and save as a CSV
- 2. Navigate to the CSI website and open the Record Checker Tool
- 3. Open the applicable files and paste into the Raw Data tabs in the template
- 4. Review the "Error Checks" tabs in the template paying attention to any highlighted fields that indicate potential errors
- 5. Make updates directly in the school's applicable system and extract new files. These can be pasted into the template again to double check nothing has been missed
- 6. Once all are corrected, the newly extracted files can be submitted to CSI for processing

Instructions can also be found: <u>https://resources.csi.state.co.us/sped-record-checker-tutorial/</u> for SPED or <u>https://resources.csi.state.co.us/the-record-checker-training-video-13-min/</u> for the Student Interchange



## Steps 1 and 2 – Extract Files and Access Tool

- Extract files directly from your SIS (PowerSchool/IC) or Plan Management System (Ascent, IC, Enrich). If using Starting Point files for HR, open those directly.
- Access the Record Checker Tool (links below), open and save the template to your computer.
- Open the tool and prepare to paste your files.

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#### **Record Checker Tool Links:**

<u>https://resources.csi.state.co.us/the-sped-record-checker-tool/</u> https://resources.csi.state.co.us/student-interchange-initial-submission-file-check-template/



#### Step 3: Open and Paste Data Files

- Navigate to the saved collection files and open them directly.
- The files will lose their leading zeros, which are not needed during checks.
- Copy the entirety of the raw file and paste directly into the Raw Child tab located in the template.
- Complete the same process for any other necessary files in the collection and paste them into the other "raw" tabs.

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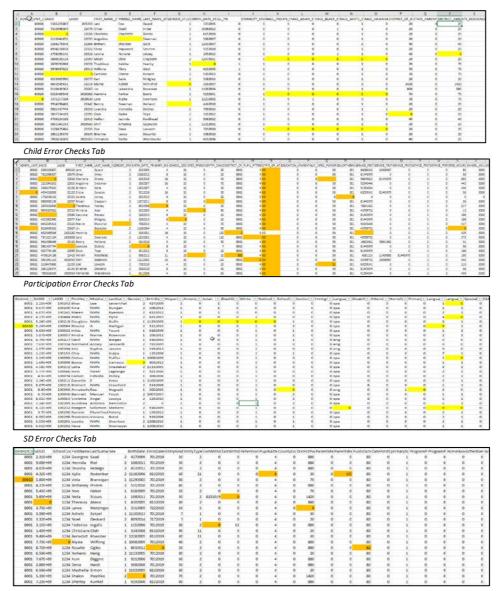
## Record Checker Demo – Opening and Pasting

Recording removed to reduce file size and for PDF formatting. Watch the recorded module to review the demo



#### Step 4: Review Error Check Tabs

- After pasting, navigate to both the File Checks tabs located in the applicable template.
- Any field that may present an issue or potential error will be highlighted directing the user what needs to be updated.
- This tool is not designed to catch every error or issue, but many of the common data entry errors a student may have within their SIS/PMS.



SSA Error Checks Tab



### Step 5 and 6: System Updates and submittals

- Once issues are reviewed and identified, navigate back to your SIS PMS and make any necessary updates.
- As all highlighted issues have been updated, new files can be extracted from your system.
- After newly extracted files have been reviewed and correctly named, submit your initial files to FileZilla and email the Submissions Inbox (<u>Submissions\_CSI@csi.state.co.us</u>)

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## Thank you!

For questions contact the CSI Submissions Inbox at: <u>submissions csi@csi.state.co.us</u>