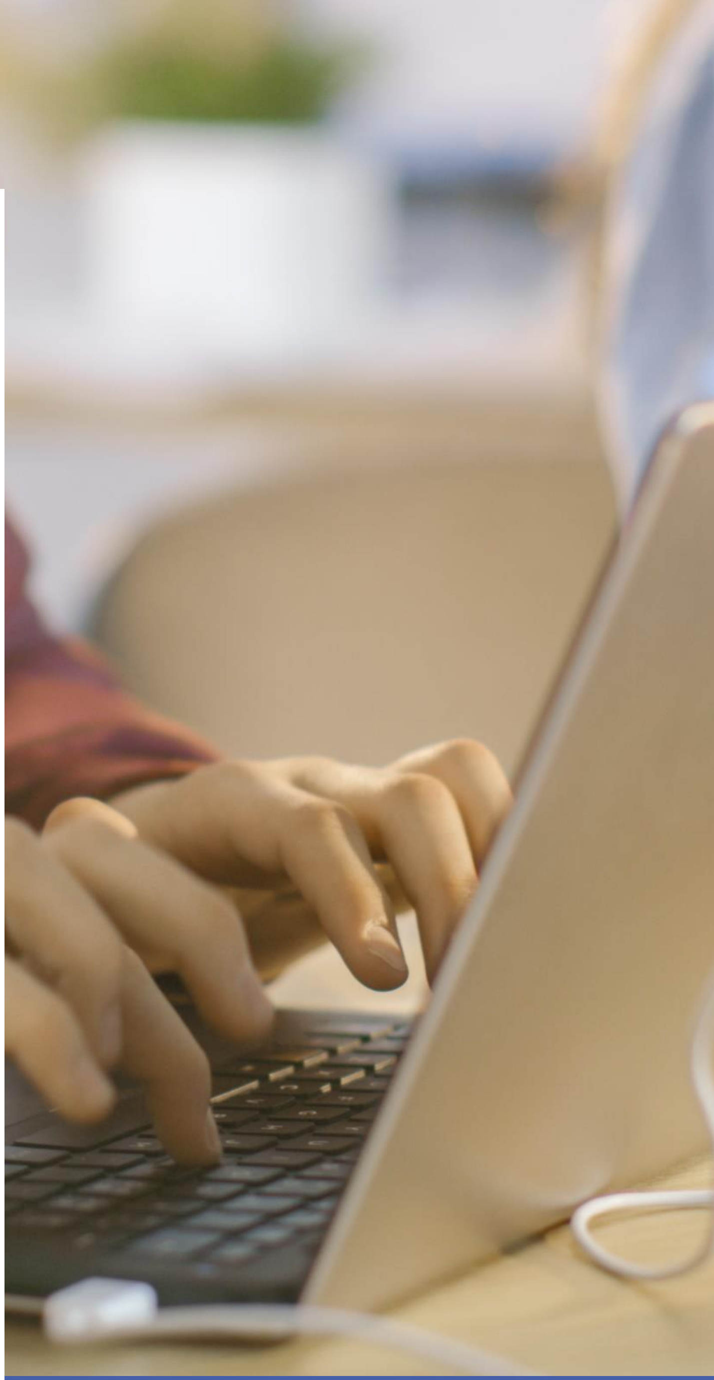


School Data Submissions Handbook

2023-24

CSI Data Submissions Team
Charter School Institute

COLORADO
CHARTER SCHOOL INSTITUTE

This handbook has been created as a tool for CSI school data submission contacts. The CSI Data Submissions Team has compiled information regarding the general process and resources related to data collections. More specific trainings will also be provided for each data collection just prior to them opening.

Please note that this is NOT a comprehensive resource. As all school offices operate differently, this resource guide may not include every aspect of working with CSI on submissions for state and federal collections. If you have specific questions pertaining to any of the information located in this handbook or need further resources, please contact the data submissions team at submissions_CSI@csi.state.co.us.

CSI seeks to ensure its resources are as accessible as possible. If you experience any difficulty in accessing a resource, please reach out to Communications_CSI@csi.state.co.us.

Thank you and we hope you find this handbook helpful. We also welcome suggestions for improving the content.

Contents

CSI Data Submissions

All public schools are legally required to report data through various state and federal data collections throughout the year. Several of the collections have funding implications (like October Count and December Count) or are used for compliance monitoring purposes (like End of Year and Special Education End of Year) at the federal, state, and local (CSI) levels. In fact, data from most data collections are used by CSI staff for the CSI Annual Review of Schools (CARS), Equity Screener, determination of tiered supports, and/or compliance monitoring.

For a comprehensive list of the legislation behind and uses for each mandatory data collection, please see CDE's *Mandatory Data Pipeline Collections: Legislation, Uses and Resources*.

See the Appendix for a **Purpose and Use of Data Collections** table for a quick reference.

Data Submissions Contacts

The Role of the CSI Data Submission's Team

The role of the CSI Data Submissions Team is to support schools in the timely and accurate submission of data for state and federal reporting requirements, and to ensure that CSI meets all state and federal submission deadlines. The CSI Data Submissions Team serves as the liaison between CSI schools and the Colorado Department of Education (CDE) for each data collection and provides training, technical assistance, and access to resources to CSI School Data Submissions Contacts. All school submissions data for state collections is submitted by CSI through the CDE web-based Data Pipeline system.

The CSI Data Submissions Team

A listing of members of the CSI Data Submissions Team follows. Schools should send requests related to processing data submissions files, troubleshooting errors, and audit-related questions to submissions_CSI@cde.state.co.us. A member of the data submissions team will process requests within 48 business hours.

CSI Staff	Key Responsibilities	Email	Phone
Janet Dinnen, Chief of Staff	Team lead	janetdinnen@csi.state.co.us	720-357-7435
Julie Eddy, Data Manager	Support for October Count/At-Risk Audit and data validations, data processing support	julieeddy@csi.state.co.us	720-417-6870
Ryan Hartung, Data Specialist	Data processing, error troubleshooting, EDID requests	ryanhartung@csi.state.co.us	720-471-6553
Cherish Trammell, Data Specialist	Data processing, error troubleshooting, SASID requests	cherishtrammell@csi.state.co.us	720-498-0840

Your Role as a School Data Submissions Contact

School leaders are asked to designate one main Data Submissions Contact to oversee the majority of data collections before the beginning of the school year. (This is done through the annual School Contact Identification form.) School leaders have the option to designate *separate* HR and/or SPED data collection contacts due to the sensitive nature of that data. It should be noted that schools may request that a secondary submissions contact be added for one or more collections (ex: Special Education December Count and End of Year collections) and can do so by contacting the CSI Data Submissions Team.

'Data integrity' is the combined accuracy, consistency, and validity of data over its lifecycle.

Each school is responsible for the data integrity and the submission process of school data through:

1. Detailed set up and maintenance of SIS
2. Regular extraction and submission of data files
3. Meeting CSI submission deadlines
4. Updating SIS to correct for reporting errors
5. Using and referencing CSI resources and troubleshooting documentation
6. Reading the **Weekly Update** email (for current submissions statuses and important announcements)

While the School Data Submissions Contact serves as the expert on the data submissions process, the role additionally requires coordination and collaboration with other school staff. The input of staff who are considered content experts, such as Special Education (SPED, English Learner (EL), Gifted & Talented (GT), homeless, 504 coordinators, School Lunch/Nutrition Coordinators, etc., are needed to ensure data accuracy and validation. It is the role of the School Data Submission Contact to reach out to and engage with these staff members and other stakeholders.

Schools are encouraged to identify and connect with key stakeholders well in advance of each collection to ensure there is an understanding of how the data is being collected, entered, and regularly updated in the data system(s).

> Example: October Count Staff Engagement
>
> While the **School Data Submissions Contact** will be the primary point of contact during the duration of the collection and submission process, it is expected that they will work with the various content experts (EL, GT, homeless, 504 coordinators, etc.) at the school before and during the data collection to ensure data is accurate, including participation in the summary report review and signature assurance process.

See the Appendix for a **School Collaboration by Data Collection** worksheet to help you identify the necessary school-level content experts for each data collection.

Onboarding Plan for New Data Submissions Contacts

The CSI website includes a Data Submissions Onboarding Letter that lists the key tasks new data submissions contacts should complete to be prepared for their data submissions role.

Tasks to Complete Independently Before You Meet with a CSI Team Member

To ensure your meeting is as productive as possible, please be sure to complete each of the following tasks before the meeting. If you have not been able to complete the tasks, it would be best to reschedule the meeting until you have had the opportunity to do so. *Plan to allocate 3-4 hours to complete these tasks.*

- ☐ **Read the** CSI Data Submissions Handbook.
- ☐ **Watch the** Data Submissions Training Modules**.**
- ☐ **Review** the current year's Data Submissions Calendar to ensure you know all collection deadlines. Make sure to print or bookmark for future use.
- ☐ **Ensure you have access to your school's student information system and plan management system (if the latter is applicable).** Most schools use either PowerSchool or Infinite Campus as their student information system. Most schools use Infinite Campus or Enrich as their plan management system.
- ☐ **Ensure you can access all relevant systems (secure file share system, RITS, EDIS) maintained by CSI.** Please be sure you are able to log into RITS and/or EDIS as applicable with the account information CSI will have provided to you.

Related resources for these tasks can be found on the CSI General Data Submissions Resources page.

Tasks that will be Completed Upon Meeting with a CSI Data Specialist

Once you have completed the independent tasks listed above, it's time to schedule a meeting with a CSI Data Specialist. (In many cases, a CSI Data Specialist will have already reached out to welcome you and to share this letter.) *Plan to allocate at least one hour for this meeting.* By the end of this meeting, the following will be accomplished:

- ☐ **High level overview of the collection process, including upcoming collection deadlines.**
- ☐ **Initial questions from your independent preparations will be addressed.**
- ☐ **Diving into any topics where additional clarity is needed.**

Resources

Key resources for data submissions are highlighted below, which schools are encouraged to use to successfully complete each collection. Please reach out to CSI's Data Submissions Team should you need support beyond the resources provided. Staff are happy to connect over email, phone, or screen share options, and will try to accommodate in-person meeting requests.

It is our goal for school staff to have access to the necessary knowledge, skills, and resources to reduce the time spent on clearing errors and adjust focus to data accuracy all while meeting required deadlines.

Weekly Update Email (WU)

The CSI Data Submissions Team sends out a weekly email to School Data Submissions Contacts (plus any other recipients designated by a school). This email includes a current submissions status table specific to each school that displays each active data collection as well as the school's status for each, including receipt of initial submission files, the number of Level 1 & 2 Errors that need addressing, and the due dates and receipt of a signed certification as part of the summary report review.

The WU also includes updates and reminders related to existing collections or other data related announcements. New information for the week is always highlighted in yellow so that schools can quickly review each version.

Note: Schools can designate additional recipients by emailing the CSI's Data Submissions Team and listing the additional email addresses that should receive the WU.

School Status as of **5/25/2022 at 9:00AM**

This table contains data specific to your school. Please review it each week.

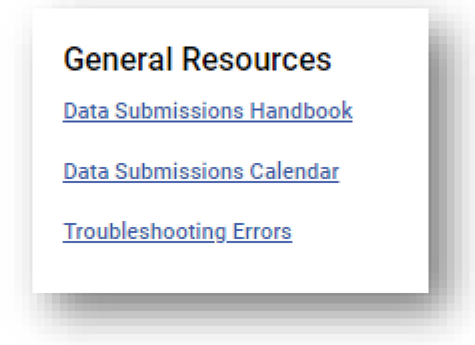
School Year	Collection	Initial File Received	Level 1 Error Count	Level 2 Error Count	Summary Report Provided to School	Signed Certification Received by CSI	Other
21-22	Teacher Student Data Link (TSDL)	*Due 2/18/2022* N/A (not required)	*Clear by 6/15/2022* N/A	N/A	N/A	*Due 7/8/2022* N/A	
21-22	End of Year (EOY)	*Due 3/8/2022* Yes	*Clear by 6/9/2022* *SD:* 0 *SSA:* 0 *Title I:* N/A *Grad:* N/A	*Clear by 7/13/2022* Attendance: 0 *Clear by 7/13/2022* EOY: 0		*To be Announced Later*	
21-22	SPED EOY	*Due 3/11/2022* Yes	*Clear by 5/11/2022* Child: 0 Participation: 0	*Clear by 6/3/2022* 0		*Due 6/17/2022*	

Website Resources

The Data Submissions Library (screenshot below) is broken into sections based on information type.

1. **General Resources** – includes information on School Calendar and Instructional Hours, SASID and EDID requests, FRL, Student Information Systems, and Plan Management Systems, along with a General Submissions Resource page, where onboarding resources are housed.
2. **School Collections** – Report Card March and Civil Rights Data Collection.
3. **Special Education Collections** – December Count and SPED-EOY
4. **Staff Collections** – Human Resources
5. **Student Collections** – Includes information on student collections, including October Count, End of Year, Discipline, and TSDL among others.

Each collection page includes a variety of resources, including the following:



General Resources: The following, general resources can be found on each main collection's page and on our [General Data Submissions Resources webpage]:

1. CSI Data Submissions Handbook (this very document).
2. CSI Data Submission Calendar – Contains main collection deadlines, including Initial Submissions, Level 1 and 2 Error Clearance, and Signed Summary Certifications among other important dates. Be sure to print this two-page document and mark important dates on your work calendar.

   Note: deadlines are also included on CSI's online calendar (where events can be exported to a user's own calendar).
3. Troubleshooting Errors Spreadsheet – This is one of the best tools available when reviewing and correcting errors listed in collection Error Reports. This document outlines most Level 1 & 2 Errors for every CSI collection *and* includes potential solutions to many errors. Check the tabs at the bottom to navigate through collections and refer to this document often as you progress through a collection. Use CTRL+F to search for specific Error Codes or keywords.

More details about the CSI Data Submissions Calendar and Troubleshooting Errors Spreadsheet are included later in this handbook.

Collection Specific Resources:
The following resources are available for each of the main data collection webpages:

1. **Trainings** – Recorded training resources (some are tailored to covering only what is new for the year and others are more detailed) will be posted for most collections. Some collections that are smaller in size and/or scope may have guidance in just an electronic document.

2. **File Layouts with CSI Additions** – These documents are a strong resource and should be referenced before each data collection begins and throughout the entire submissions process, especially when troubleshooting errors. The file layouts with CSI additions include specific instructions on how data needs to be formatted, what information to include, how data should be coded, and what field lengths are valid. It also includes any required data codes, code definitions, and scenarios on when to use these codes.

3. **Templates** – Most collection data should be extracted directly from a school's SIS. However, there is occasionally a need or convenience to manually enter data (such as the HR or RCM collections). Templates are provided as a starting point for schools manually entering data.

4. **Data Validation Strategies Toolkits** – These resources are typically in check list format and are intended for use to double-check and verify your data before submission. Using this will help to keep errors low, making the submission process smoother.

5. **Record Checker Tools –** Major collections include a Record Checker Tool. This tool flags potential errors in data files prior to submission to CSI. Using this tool prior to the initial submission deadline allows school data submissions contacts to review and update data based on the tool's findings, ultimately leading to fewer errors with initial submissions.

6. **Coding Scenario Documents** – To further help in the reduction of errors, the Data Submissions Team has created coding scenario documents to help School Data Submission Contacts understand which coding options to use for specific scenarios. Two examples are the Quick Reference: Entry/Exit Fields document found on the EOY website and the Special Education (SPED) Participation File Coding Scenarios with Supplemental Guidance found in SPED EOY.

A Tip on Resource Management: Keep it all in a binder.

Creating a binder for each collection not only helps to manage the resources but also serves as a quick review on a collection from one year to the next. A collection binder can also be a source of training and communication for new data submission contacts.

Things to include in the binder are the collection timeline, file layouts, SIS specific guidance, and any other resources unique to each collection.

Tiered Support

To best serve School Data Submission Contacts, CSI's Data Submissions Team follows a tiered support process. CSI's Data Submissions Team uses the tiering process to provide additional supports and interventions to schools that are newer to the data collection process as well as schools that have persistent issues related to submission quality or submission timeliness for key data collections.

All schools receive standard support from CSI's Data Submissions Team for each data collection. Types of supports include:

- General Submissions training
- Training for each data collection
- Weekly Email Updates
- Error clearance assistance upon request

Some schools receive additional, Tier 2 supports. Tier 2 supports are collection-specific and may include:

- Earlier submission, error clearance, and certification deadline(s)
- Regularly scheduled call or calls scheduled prior to deadlines
- Screen sharing/walk throughs
- Regular email updates on progress

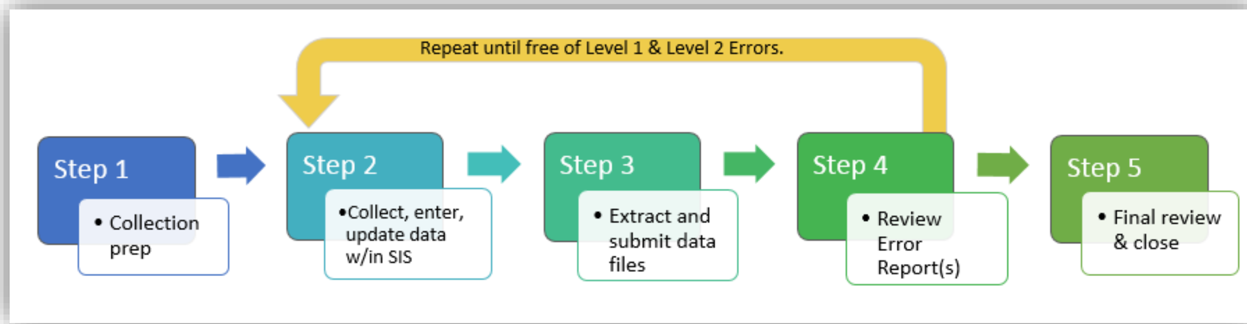
Tier 2 supports are available to schools with:

- New Data Submission Contacts ,
- Historic or existing issues in the timely and accurate submission of data for key data collections, and
- A request to access one or more Tier 2 supports.

Tier 2 supports are collection-specific and determined annually. A school may be receiving Tier 2 supports for October Count, for example, but not for December Count. Similarly, a school may receive Tier 2 supports for October Count this year, and based on strong performance this year, would not be required to receive Tier 2 supports for October Count next year. Tier 2 supports continue for the duration of a data collection.

The Data Submissions Process

The data submissions process can be summarized as a five-step iterative process. Steps 2 through 4 are repeated until a school is error free.



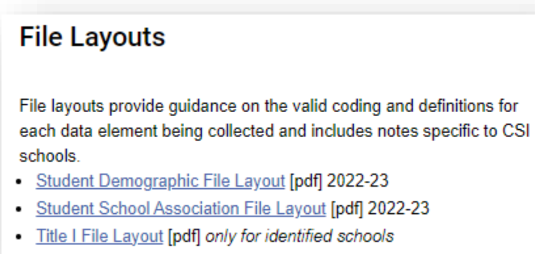
Step 1: Collection Prep

There are approximately 12 data collections that are required by CDE, and it is important to note that data requirements change from collection to collection and even within a collection from one year to the next. For this reason, the very first step in any collection should be to review the *File Layout - CSI additions* and other resources provided.

Navigate to the collection-specific page on the CSI Data Submissions Library website, and scroll through the resources, opening any you are unfamiliar with to get a feel for the information each resource contains. In addition to reviewing the *File Layout - CSI additions*, make sure to set aside time to review collection training videos, the *Troubleshooting Errors* spreadsheet for the specific collection, and the *Validation Strategies Checklist/Toolkit*. Finally, be sure to review and mark on your calendar all collection specific deadlines. Some schools choose to block data collection work time on their calendars or set earlier, internal deadlines to stay on track throughout a collection.

Preparing for a collection by reviewing the *File Layouts – CSI Additions* resource will save you time and reduce your errors in the long run. As previously mentioned, the File Layout resources identify:

- what data the collection is capturing
- how the data must be formatted to be valid
- definitions of data fields and codes
- removed fields (red strikethrough)
- new or changed fields and codes (highlighted in yellow).



An example of File Layouts for the October Count Data Collection.

For a quick tutorial on how to use the File Layout and Definition document, review the [How to Use the File Layout and Definition Document module.]

Most collection pages have a *Data Validation Resources* section. It is always good to review all materials found in any collection's 'Data Validation Resources' section before you submit your initial file and throughout the collection. The screenshot below is taken from the October Count collection resources page which contains a total of four data validation resources, including a toolkit and record checker tool.

Data Validation Resources

Data validation resources should be utilized prior to submitting initial files to CSI and throughout the collection to ensure data is comprehensive and accurate. Regularly using the data validation resources will reduce the number of updates needed at the end of the collection after receiving the Summary Report.

- October Count Record Checker Tool [instructions] [tool]
- October Count Validations Toolkit [pdf]
- Finding District of Residence [pdf]

An example of Data Validation Resources for the October Count Data Collection

Step 2: Data Collection, Entry and Initial Review Processes

The next step in the data submissions process is for schools to collect, enter, and complete an initial review of their data prior to each data collection initial submission deadline. This step can be considerably less time consuming with proper SIS set-up, regular SIS maintenance, diligent data entry and update, and occasional SIS data audits.

Collecting Data

It is important to *be consistent in how data is collected and entered* to save time during the collection process. Data can be created in several ways:

- Internally, such as when Special Education staff create an IEP for a student.
- Self-reported by families (when parents identify student race and ethnicity in student enrollment paperwork)
- Identified by staff (when new hires identify their prior experience and qualifications in new employee paperwork).
- Externally, such as when the CDE generates a SASID number for a student new to the Colorado education system.

New data is collected and should be entered into your SIS when:

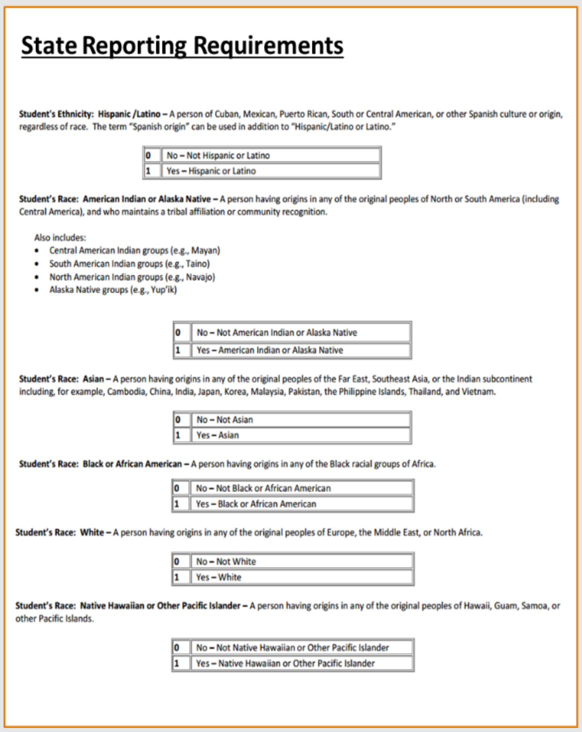
- A student enters, exits, or transfers
- A student was involved in an incident and discipline

- An IEP is created
- Accounting for daily attendance
- A course schedule is created for a student
- Grades are entered

If your school already has forms and procedures in place for data collection it would be best to check annually that the forms are aligned with state required fields and eligible codes and that you are collecting all required information.

CSI has several policy related resources to assist schools in following best practices with data entry. See the CSI Legal and Policy webpage under the Policy Guidance by Topic for information in areas such as Admissions and Enrollment, Attendance, Homeschool Guidance, among others.

Example: Crosswalk State Reporting Requirements to Your School Forms



State Reporting Requirements

Student's Ethnicity: Hispanic /Latino – A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race. The term "Spanish origin" can be used in addition to "Hispanic/Latino or Latino."

0	No – Not Hispanic or Latino
1	Yes – Hispanic or Latino

Student's Race: American Indian or Alaska Native – A person having origins in any of the original peoples of North or South America (including Central America), and who maintains a tribal affiliation or community recognition.

Also includes:
- Central American Indian groups (e.g., Mayan)
- South American Indian groups (e.g., Taino)
- North American Indian groups (e.g., Navajo)
- Alaska Native groups (e.g., Yup'ik)

0	No – Not American Indian or Alaska Native
1	Yes – American Indian or Alaska Native

Student's Race: Asian – A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.

0	No – Not Asian
1	Yes – Asian

Student's Race: Black or African American – A person having origins in any of the Black racial groups of Africa.

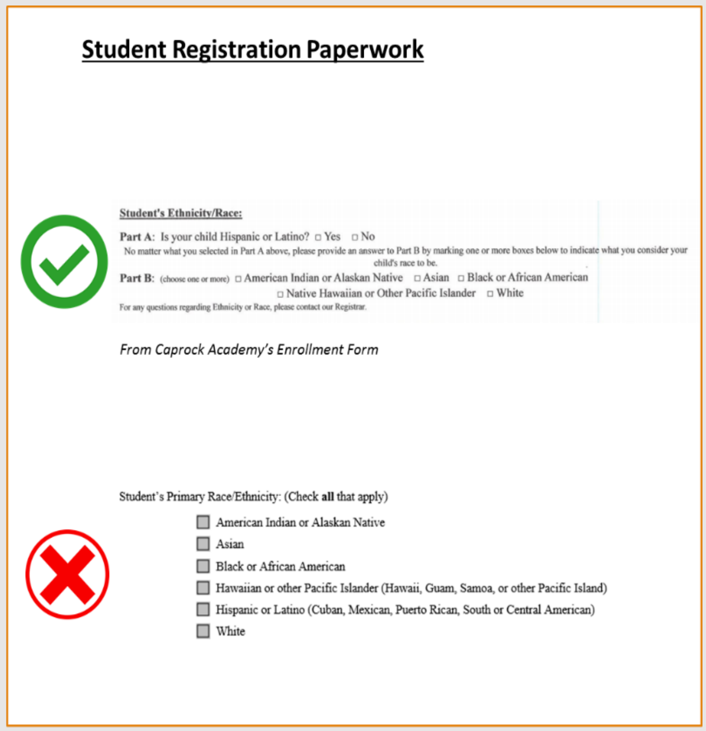
0	No – Not Black or African American
1	Yes – Black or African American

Student's Race: White – A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.

0	No – Not White
1	Yes – White

Student's Race: Native Hawaiian or Other Pacific Islander – A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

0	No – Not Native Hawaiian or Other Pacific Islander
1	Yes – Native Hawaiian or Other Pacific Islander



Student Registration Paperwork

Student's Ethnicity/Race:

Part A: Is your child Hispanic or Latino? ☐ Yes ☐ No

No matter what you selected in Part A above, please provide an answer to Part B by marking one or more boxes below to indicate what you consider your child's race to be.

Part B: (choose one or more) ☐ American Indian or Alaskan Native ☐ Asian ☐ Black or African American ☐ Native Hawaiian or Other Pacific Islander ☐ White

For any questions regarding Ethnicity or Race, please contact our Registrar.

From Caprock Academy's Enrollment Form

Student's Primary Race/Ethnicity: (Check **all** that apply)

- ☐ American Indian or Alaskan Native
- ☐ Asian
- ☐ Black or African American
- ☐ Hawaiian or other Pacific Islander (Hawaii, Guam, Samoa, or other Pacific Island)
- ☐ Hispanic or Latino (Cuban, Mexican, Puerto Rican, South or Central American)
- ☐ White

Following a crosswalk strategy to compare the data collection file layout document (left) with your school's forms (right) can ensure your school is collecting the right information in the right way. In this example, the school compared the state-required race and ethnicity fields (left) with what was included on the school's student registration paperwork. There are two examples of how schools collected race/ethnicity. The top example aligns with state requirements where the family must choose a response for Ethnicity and then has the option to check one or more race. The bottom example does not align with state requirements because it does not require the family to choose both ethnicity and one or more races.

See the Appendix for a listing of forms that aid in the data collection process for student and staff registration.

Requesting Student/Staff ID's

As part of the data collection process, Data Submissions Contacts will need to confirm whether incoming students and staff have a unique state identification number (required for the key identifier in the student and staff collections).

The student identification number is known as a **SASID (generated through RITS).**
The staff identification number is known as an **EDID (generated through EDIS).**

Returning students and staff as well as students and staff who have attended or been employed at a public school previously should already have a unique state identification number. Those new to the Colorado public education system will require an identification number to be generated through the state systems.

To determine whether student or staff members already have a SASID or EDID, please access the CDE RITS system for students and the CDE EDIS system for staff. Be sure to search these systems thoroughly first before requesting new identifiers. Accounts for the RITS and EDIS systems will be created for school staff by CSI upon request. An account for the EDIS system typically requires permission from a school leader or their next in line approver.

Review the SASID Request/UpdateGuide and the EDID Request/Update Guide for step by step instructions for checking for, requesting, and updating student or staff ID numbers.

Data Entry

Once data has been collected, it needs to be entered into the school's data management system(s). Data management systems commonly include:

- A Student Information System (SIS) like PowerSchool or Infinite Campus
- A Student Plan Management System like Enrich, or Infinite Campus

Resources on how to enter data into each data management system are available through CSI or directly through the data management system vendor.

Diligent, careful, and consistent data entry practices will significantly reduce errors in your data and shorten the time you spend on a given data collection. Data entry staff should be aware of the valid and appropriate codes to use when entering data into the data management system(s). Data field codes for a specific collection are always found in the *File Layout – CSI additions. Data fields and codes can change annually, so schools should always use the most current version posted on the CSI collection webpages.*

Schools should access the following resources when seeking SIS support:

1. Schools should utilize the SIS online community, trainings, and resources as the primary method for accessing support related to student information system set up and troubleshooting.
2. Each SIS vendor provides troubleshooting support through a ticket system if the available resources to do not address the specific issue you are experiencing.
3. Additionally, CSI has posted several SIS resources in the CSI Data Submissions Library to address common questions or challenges related to state reporting.
4. Finally, schools can reach out to the CSI Data Submissions Team with SIS questions related to state reporting.

See the following table below for helpful links to resources when using the main student information systems (SIS) used by CSI schools, which are Infinite Campus and PowerSchool. CSI can provide support in limited SIS-related issues. Therefore, schools should reach out directly to the SIS support team when troubleshooting an issue.

<table>
<tr><th>Data System Resource</th><th>Screenshot of Data Entry Resource</th></tr>
<tr><td>Infinite Campus: Campus Community (login required)</td><td>Check the “Report Layout” table and refer to the “Campus Interface” column

Report Layout

This table includes fields returned in 2015-16 format and the 2016-17 format.

<table>
<tr><th>Data Element</th><th>Description</th><th>Format, Type and Length</th><th>Campus Database</th><th>Campus Interface</th></tr>
<tr><td>District Code</td><td>The number assigned to a school district by the state department of education.</td><td>Numeric, 4 digits</td><td>District.number</td><td>System Administration > Resources > District Information > District Information > State District Number</td></tr>
<tr><td>SASID</td><td>A unique number assigned to a student by the Department of Education.</td><td>Numeric, 10 digits</td><td>Person.stateID</td><td>Census > People > Demographics > Person Identifiers > Student State ID</td></tr>
</table></td></tr>
<tr><td>PowerSchool: Student Setup OR CSI PowerSchool/Data Collection Mapping Guide</td><td>PowerSchool’s Student Setup page identifies all student fields used for state reporting, where to find them in PowerSchool, and notes about the field. Alternately, schools can use CSI’s PowerSchool Data Collection Mapping Guide for similar information.
<table>
<tr><th>SD Field</th><th>Find in PowerSchool</th></tr>
<tr><td>District Code</td><td></td></tr>
<tr><td>SASID</td><td>State/Province - CO --> CO Demographics --> State ID (SASID)</td></tr>
<tr><td>LASID</td><td>Demographics --> Student Number</td></tr>
<tr><td>First Name</td><td>Demographics --> First</td></tr>
<tr><td>Middle Name</td><td>Demographics --> Middle</td></tr>
<tr><td>Last Name</td><td>Demographics --> Last</td></tr>
<tr><td>Gender</td><td>Demographics --> Gender</td></tr>
<tr><td>DOB</td><td>Demographics --> DOB</td></tr>
<tr><td>Ethnicity</td><td>Demographics --> Ethnicity</td></tr>
</table>
* While most data is generally hand input, there are opportunities to mass import data into some systems. For example, PowerSchool has the capability to mass import some fields. For more information on using this capability, please access the Data Manager Distance Learning module in PowerSource (login required). It is strongly recommended that mass imports not be done without appropriate training and practice. When in doubt, consult PowerSchool staff for support.</td></tr>
</table>

Data Review

Once data has been entered into the data management system(s), the School Data Submissions Contact should do an initial review of data prior to any data collection initial submission deadlines for the year.

For each major data collection, the CSI Data Submissions Team has developed a **Record Checker Tool** to supports schools in reviewing and validating data prior to submission to CSI by automatically flagging data that may be inaccurate or incomplete.

For collections that do not have a Record Checker Tool, School Data Submissions Contacts should engage in an internal data review process that should include one or more of the following:

- **Use the search/reporting features of the data system to search for blank fields**, then fill the blanks in with appropriate data. This can help to reduce the number of errors you are having to address from the Data Pipeline error reports.

- **Use the search/reporting features to search for certain fields/codes** which may be set to a certain value by default. For example, full time funding code of 80 may be set by default (or roll over automatically from the prior year) so it would be up to school staff to adjust the funding status for students who are not eligible to receive full time funding.

- **Use reporting features to pull enrollment counts by classroom, grade, etc.** to ensure alignment with class rosters. Sharing the various SIS reports available with appropriate school staff can help to validate data further. For example, providing a class roster to the teacher can help validate its accuracy.

- **Extract collection files and review:** The final data review process prior to submittal is to extract the files and open them to review for missing information. Checking for anomalies or zero filled cells may help diagnose data entry issues.

A Tip on Timing

The time it takes to enter student data each year is dependent on several factors including number of new students, scheduling, changes to existing student information, etc. Similarly, the time it takes to enter staff data each year is dependent on the number of new staff, changes in existing staff assignments, etc.

Because schools are required to submit student level data for the October Count data collection in September, it is **strongly recommended** that schools allocate appropriate resources (staff, time) to ensure data is entered in a timely manner.

Step 3: File Extraction & Submission to CSI

Extracting Files from the Data System

Most of the required files can be created from your school's data management systems (ex: Infinite Campus, PowerSchool, and Enrich).

Data System	Report Extract
Infinite Campus	Campus Community State Reporting Pages (login required) Infinite Campus' Campus Community has a resource page for every state data collection, and each resource page includes step by step instructions for extracting files for state reporting. Typically, state reports can be extracted from Infinite Campus by clicking on CO State Reporting → Data Pipeline then selecting the appropriate collection.
PowerSchool	PowerSchool Colorado Reports PowerSchool's State Reporting Guide has a section for every state data collection, and each section includes step by step instructions for extracting files for state reporting. Typically, state reports can be extracted from PowerSchool by clicking on System Reports → State tab then selecting the appropriate collection.
Enrich	Access to trainings, documents, and other resources can be found on the Enrich Learning Center page.

Please keep in mind that while these systems can generate state reports, the quality of data is dependent on proper system setup and accurate data entry. For example, while PowerSchool *can* generate a Discipline report, the data generated is reflective of system set-up and data entry. Thus, for this report to be accurate, the system needs to be set up according to the vendor's specifications and accurate data need to be input into the correct fields.

Schools are responsible for ensuring their student and plan management systems have all necessary system updates to ensure for accurate and up-to-date state reporting. Schools should run a test data collection extract before the initial CSI submission due date to confirm that data is extracting as expected and that the extracted file is not blank.

SIS vendors will typically send emails to each school's technical contact, letting them know when updates are available, and which updates are necessary for state reporting. It is extremely important that schools ensure that updates are installed in a timely manner and make sure your technical contact is up to date with your SIS vendor. When practical, CSI will communicate required SIS updates through the Weekly Update Email.

See the Appendix for a **Student Information Systems Resources** page to help you identify materials to ensure appropriate system setup.

Each main data collection includes a **Data Validation Strategies Toolkit** which outlines some types of data to check for accuracy prior to and during the submissions process. These can be found on each collection's webpage.

A Tip on Extracting Files from your Data System
Schools should consider testing the file extract from their data system in advance of the CSI initial submission deadline for each data collection. Doing so will help you to identify whether the extract is working or whether a system update may be required. It will also help to identify any fields with missing data so you can update these fields prior to your initial submission, reducing the number of initial errors received on your first error report. Additionally, schools should always plan to use the Record Checker Tool early and often to review and validate data prior to submission to CSI.

Submitting Data to CSI

Schools are responsible to:

1. Extract the state reporting data files from your SIS
2. Name the file according to the CSI file naming format:
    a. [schoolcode]_[schoolinitials]_[filetype]_[date]
    b. Ex: 1234_CSI_ EOY_06212019
    c. ***No spaces are allowed in the file name*** – please use underscores (_) or dashes (-)
    d. If you submit more than one file for the same collection within the same day, simply append it with a version number, such as v2, or v3
3. Unless CSI staff instruct otherwise, upload the files to the secure file share system, placing in the proper collection folder (see the Data Privacy and Security section for more information
4. Email the CSI Data Submissions Team at submissions_CSI.state.co.us to inform them that files are available to be processed

DO NOT email personally identifiable information (PII). This includes name, SSN, address, birthdate, and gender. Email is not a secure channel and a person's privacy and data security could be compromised and should therefore not be used to transfer files containing PII of educators or students.

Instead, schools should use CSI's secure data share system (Google Drive) to securely share files. More information about PII and the process of sharing data can be found in the Data Privacy and Security section of this handbook.

Once a member of the Data Submissions Team processes your files, they will place the error reports (if there are any) within the **Error Reports** shared folder and email the school data submissions contact that error reports are available. Please allow 24-48 hours (business days) for this process to be completed, but typically the wait time is shorter. During peak collection times or limited staff availability it may take longer for CSI to process files and provide error reports. CSI will inform schools when there may be an extended period between file submission and receiving an updated error report.

When a school has cleared all errors (and corrected invalid data indicated by warnings), then summary reports will be generated and placed in the **Summary Certification** shared folder for the school to review and sign off on.

Step 4: Troubleshoot and Resolve Data Errors

Errors and Warnings

There are two levels of error clearance a school needs to pass for most collections. At each level an error report is generated for each file submitted. There are typically two main levels of error checking that take place using the CDE Data Pipeline system:

Level 1 Errors

Level 1 errors are generated if data in an interchange file submitted does not meet one or more of CDE's business rules for the file.

Errors can be caused by incorrect formatting (i.e. missing leading zeroes), missing information (i.e. blank cells), or data that does not follow the state's business rules for a particular field (i.e. incorrect values). Example: Are student's birthdates in line with grade level?

Level 2 Errors

Level 2 errors are generated after CSI runs a snapshot, which combines data from multiple interchange files within and across collections. Similar to Level 1 errors, an error would be generated if the data in the files submitted does not meet one or more of CDE's business rules for the particular snapshot. Unlike Level 1 errors, Level 2 errors can be caused by interactions between data your school has submitted and data submitted by another CSI school. Some collections may not have a Level 2 error check.

Within each error report, there can be both Errors and Warnings.

Resolving Errors

It is very rare to have a data submission pass both Level 1 and Level 2 errors on the first submission, so please know that there is not an expectation for all errors to be resolved within one submission. That said, schools are strongly encouraged to work through as many errors as possible on their initial error report to reduce the number of file submissions to CSI needed to resolve all errors.

Schools should use the error report to identify data that needs to be reviewed and updated to ensure accuracy. **Never change data manually on the Error Report or the data file. Data *must* be updated in the SIS and a new report extracted and submitted. There is an exception here for collections such as the Human Resources, sometimes the Report Card March, and sometimes the End of Year after rollover where you will update the data file/template itself.**

For support on understanding the cause of an error and how/where to resolve it, please review the CSI Troubleshooting Errors resource in conjunction with the ***File Layout – CSI additions***. The ***Troubleshooting***

Errors resource is a working document that provides detailed notes about what fields to review and how to resolve most errors. Find the collection from the tabs at the bottom. Schools can then search/filter this resource by ‘Error Code’ then review the ‘Troubleshooting Notes’ column for details on error cause and resolution. This is a working document updated as CSI encounters solutions to errors. If there is not an intuitive solution for your error, we will happily work with you to troubleshoot your data and update this resource when new solutions are found.

Submission File Field Name	Submission File Excel Column	Data Element Name	Error/ Warning Code	Error Type	Message	Troubleshoot Notes
Attends District Funded HSED Program	U	ATTENDS_GED_PROGRAM	SP49	Error	Attends GED Program does not contain a valid code.	Allowed values for the "Atends District Funded HSED Program" are 0=No and 1=Yes.
Language Background Bilingual	SY	BILINGUAL	SP152	Error	Students with a Language Background of English (eng) can only have a Bilingual code of 0. English speaking students cannot be in a Bilingual program.	Consult the SD file layout if more clarification is needed for coding scenarios of these fields. Correct the student record in your SIS.
Language Background Bilingual	SY	BILINGUAL	SP156	Error	Students with a Language Background other than English (eng) cannot be enrolled in both a Bilingual and a ESL program.	Consult the SD file layout if more clarification is needed for coding scenarios of these fields. Correct the student record in your SIS.
Language Background	S	BILINGUAL	SP161	Error	Students with a Language Background other	Consult the SD file layout if more clarification is needed for

Screenshot of CSI Troubleshooting Errors Resource

Exception Requests

Errors almost always identify inaccurate data that needs to be updated. *Sometimes, there is a unique situation in which the data is correct and the error needs to be overridden. In this case, an exception can be granted by CDE to ignore the error within the Data Pipeline.* **Schools should not be modifying data to clear errors if the modification is not accurate. If you are unsure on how to clear an error after exhausting the available collection resources, please reach out to the CSI Data Submissions Team for help.** If an exception is needed, CSI will request an explanation for the exception from the school to provide to CDE.

Step 5: Review and Certify Data

The last step in the data submissions process is for schools to review and certify their data before the final submission of a collection by CSI to CDE. Once the data has cleared Level 1 (Interchange) and Level 2 (Snapshot) errors, CSI will provide a **summary report** that will include the final data that was submitted by the school. In addition to providing the raw data, CSI will sometimes provide aggregate and trend data or highlight data to review for accuracy.

The summary report includes a certification (signature) tab. Typically multiple school contacts will be required to sign, including the school leader. This certifies that data has been reviewed for accuracy. In the example below for the October Count collection, multiple school-level contacts are all required to sign off that each has reviewed the relevant data and confirmed its accuracy. Schools should consider all the signatures required and plan accordingly to ensure that all required staff will be available to review data and sign by the CSI deadline.

It is a school’s responsibility to ensure that all appropriate parties have reviewed the data for accuracy and sign off on the certification. It is to the school’s advantage for appropriate parties to be reviewing summary data *prior* to receiving the CSI-created summary report to allow adequate time for school staff to make changes in the data system if an inaccuracy is identified.

October Count Certification

By signing below, I agree that I have reviewed all applicable data for the **2021-2022** October Count submission and certify its accuracy to the best of my knowledge (all staff positions listed should review the data in this report and sign on the designated signature line).

	Signature	Date
School Leader:		
Data Submissions Coordinator:		
Special Education Coordinator:		
Section 504 Coordinator:		
ELL Coordinator:		
Gifted/Talented Contact:		
Free and Reduced Lunch Contact:		
Homeless Liaison:		
Business Managers/Finance Contact:		

If you find issues in the data, please see the Instructions tab for guidance on next steps you need to take.

This signed certification is due to CSI no later than November 4, 2021. Simply email just this signed page to submissions_csi@csi.state.co.us

Screenshot of 2021 October Count Certification Tab

Data Collection Timeline

The CSI Data Submissions Team set submission deadlines ahead of CDE deadlines to allow schools adequate time for data review and validation. Deadlines for each collection are posted to the CSI Submission Calendar and to the CSI website calendar annually. The CSI Submission Calendar is updated annually and may not contain all the deadlines within some collections. When changes need to be made to deadlines, such changes are communicated via training resources and the Weekly Update email.

Most collections have the following types of dates associated with them (posted each year on the CSI Submissions Calendar). Schools need to strive to meet each collection deadline, but if there are extenuating reasons where you will not be able to meet a deadline, then please notify the CSI Data Submissions Team as soon as possible. **Please know that missing deadlines interrupt the project flow for each collection and possibly lead to issues in completing needed data validation checks and with meeting state mandated deadlines.**

Training

Date of live/recorded webinar training. Smaller collections may not have a webinar training but will instead have an instruction sheet listing out requirements.

Initial Submission

Date schools submit initial files. It is not expected that these files are error free or comprehensive. However, it is expected that schools utilize the Record Checker Tool and update data in the SIS prior to initial submission.

Level 1 Error Clearance

Date files are required to be error free at Level 1. Schools should be regularly updating their SIS and resubmitting files to ensure this deadline is met.

Level 2 Error Clearance

Date files are required to be error free at Level 2. Schools should be regularly updating their SIS and resubmitting files to ensure this deadline is met.

Certification Due

Date schools submit a signed certification to CSI to confirm accuracy of data in the Summary Report

The CSI Data Submissions Team welcomes schools to submit files earlier than the initial submission deadline and encourages schools to clear errors well in advance of the error clearance deadlines.

Additionally, some data collections extend over school breaks, including the summer. If a school would like to try to work around school breaks, please communicate in advance with the CSI Data Submissions Team and staff will do its best to accommodate such requests.

CSI Data Submissions Calendar

A printable version of the CSI Data Submissions Calendar can be found on the CSI Data Submissions Resource Library.

All deadlines are subject to change and CSI will sometimes revise the calendar midyear if changes are needed.

Each posted calendar version will show a last updated date; therefore, schools are advised to check the website for revised versions periodically throughout the year.

The CSI website calendar will also list each of the primary collection deadlines.

Data Privacy and Security

Schools should NOT email personally identifiable information (PII). This includes name, SSN, address, birthdate, and gender. Email is not a secure channel and a person's privacy and data security could be compromised. Therefore, email cannot be used to transfer files containing personally identifiable information of educators or students.

Instead, schools should use CSI's secure data share system described below to securely share files.

Google Drive (G-Drive)

CSI will share applicable folders within G-Drive for school Data Submissions Contacts identified on the School Contact Information Form that school leaders complete each summer. If the Data Submissions Contact at the school changes, please email the CSI Data Submissions Team so that CSI can adjust folder sharing permissions.

Schools should upload their files to the appropriate shared folders and then email the CSI Data Submissions Team to inform CSI staff of the files ready to be processed. Please do be sure to identify the collection you are referring to within emails to CSI as there are multiple collections taking place simultaneously throughout the year.

CSI will upload documents to the school (error reports, summary reports, other documents containing PII, etc.) to the appropriate shared folders and then notify the school.

CSI will keep data from the prior year's collection until the collection is finalized at the state level. At that time, CSI will notify schools that prior year's files will be removed from the secure file share system. It is the school's responsibility to ensure they are keeping necessary files within the school's network as appropriate.

Instructions for using the secure file share system can be accessed on the CSI General Data Submissions Resources webpage under the Training Modules section within the Data Security topic.

Quickbase

CSI is rolling out implementation of Quickbase, an online database system, to streamline a variety of tasks across the organization. This system may be used in limited circumstances in the coming year to trial some processes that would streamline state reporting for CSI and school users. Watch for more information in the Weekly Update emails.

Records and Documentation Retention

Schools should plan to keep records and documentation related to data collections/submissions for at least seven years unless advised otherwise relative to specific collections within the Records Management Manual for School Districts or according to the retention and disposition schedules outlined by the Colorado State Archives in its State Agency Records Management Manual.

CDE does provide specific retention guidance for the October Count collection within the CDE October Count Audit Resource Guide found on the CDE Pupil Count webpage, the English Language Learner Count Audit Resource Guide found on the English Language Learner Count webpage, and the CDE At-Risk Audit Resource Guide found on the At-Risk Count webpage. The wording in each resource currently varies, but essentially requires that *schools retain any associated documents supporting certifications made to CDE or any data provided to CDE for the purposes of administering the Public School Finance Act of 1994 until audited by CDE, or until five years from any certification due dates, whichever comes first*. We recommend retaining documents until after audits have been completed by CDE, and CSI will notify schools once an October Count audit has been complete.

Documentation for Carryover Status

For the At-Risk audit on free and reduced-price lunch eligibility statuses reported in the October Count collection, if a carryover status from a prior year is used to report eligibility for the next year, then the documentation and forms (items such as federal meal applications, state FEDS forms, and McKinney-Vento forms, etc.) used to determine eligibilities in the prior year *must be kept until the audit is complete* for the next year. If there is any doubt about whether carryover status has been used into the next year, then schools should retain these types of documents an additional year beyond the last completed audit.

Appendix

I: Purpose and Use of Data Collections Quick Reference

COLLECTION	DESCRIPTION	MAIN PURPOSE/IMPACT
RITS	Collects basic student demographic information for assigning a student number (SASID)	Necessary for every student data collection
EDIS	Collects basic employee demographic information for assigning an employee number (EDID)	Necessary for the staff data collection and special education student data collections
October Count	Collects student demographic and enrollment information as of the pupil enrollment count date.	October Count determines a school's per pupil revenue funding (PPR), At-Risk, and ELL Count funding for the year as outlined in the Public School Finance Act of 1994, as amended (22-54-101, C.R.S.). Data is also reported in the federal EDFacts system.
Human Resources	Collect information on all staff employed by each school as of December 1.	One of the primary purposes of this collection is to ensure that necessary staff is qualified and effective.
Report Card March	Collects characteristics of the school's programming.	Data from this collection provided in CDE's School View application, which can help inform guardians about school offerings as they determine which school students should attend.
School Discipline	Includes school-level counts of discipline by student behavior (e.g., bullying or vandalism).	Data from this collection provided in CDE's School View application, which can help inform guardians about school offerings as they determine which school students should attend.
End of Year	Collects student enrollment and attendance information throughout the school year.	Used to calculate dropout, graduation, and completion rates which are used in accreditation rating determination as well as attendance rates.
Teacher Student Data Link	Collects data on student performance in school courses.	CDE's educator identifier system links student data to educators for the purposes of supporting the continuous improvement of teaching and learning.
December Count	Gathers information on students with special needs and SPED teacher qualifications.	December Count is used to allocate federal funding for student special services.
Special Education End of Year	Collects all referrals, evaluations, and special education services offered by a school during a school year.	Information from this collection is used to monitor compliance in the provision of services to students with disabilities.
Student Biographical Data Reviews	Four SBD reviews of state assessment data: ACCESS, CMAS, SAT/PSAT, DLM.	SBD reviews allow schools the opportunity to conduct a final verification on the accuracy of both the demographic and assessment related data prior to the release of test results.

II. Forms to Support in Data Collection

Data required for reporting is typically either self-reported by the student/staff or determined by experts at the school.

Data submissions contacts should connect with appropriate school staff to understand how/where the data is being collected, who is responsible for collecting the data at the school, entering the data into the data system, and updating the data as needed.

Student Data Collection

Student Registration

A majority of the fields on the Student Demographic interchange file and some fields on the Student School Association interchange file can be collected through the annual student registration process for new and returning students. Both of these interchange files are submitted for the October Count and End of Year collections. Please access the current year *File Layout - CSI Additions* documents to see a complete listing of the fields for each of these files (posted on the October Count and EOY collection webpages).

Home Language Survey

All students new to your school must complete a Home Language Survey as the first step in determining English language proficiency. More information about the English Learner identification process can be found on the CSI English Language Learners webpage.

Data from this form, and the subsequent assessment of students with home languages other than English, will be used to populate the state collection English Learner fields (Language Background, Language Proficiency, and Language Instruction Program) in the SIS.

Free and Reduced-Price Meal Eligibility

State statute (Section 22-54-112(4), C.R.S.) requires every school to include the federal Application for Free and Reduced-Price Meals or the state Family Economic Data Survey form in its registration materials. The materials shall include an explanation that these documents will be used to determine whether the school is eligible for at-risk funding on behalf of the pupil and, by filling out the form, the parent is ensuring the district or school will receive the at-risk funding to which it is entitled, based on the population of at-risk pupils served by the district.

State Family Economic Data Survey (FEDS) Eligibility Form

Schools not participating in a federal child nutrition program (contracting with a School Food Authority) can and should request that families complete a current year Colorado Family Economic Data Survey Form (FEDS), which will be posted on the CSI Free and Reduced Lunch Eligibility webpage. School staff reviews the responses against state criteria to determine free or reduced lunch eligibility.

Federal Free and Reduced Meal Benefit Application

Schools participating in a federal child nutrition program will have families complete a Free and Reduced Meal Benefit Application to determine free or reduced lunch eligibility. The form and identification are typically managed by the School Food Authority (SFA) on behalf of the school.

Data from these forms will be used to populate the Free and Reduced Lunch eligibility fields in the SIS.

Residency Information for the McKinney-Vento Act

Schools should use the McKinney-Vento Act Residency Form found on the McKinney-Vento Act webpage to assist in the identification of students experiencing homelessness at the school.

Completed forms should be uploaded to the applicable folder of the CSI secure file share system for the CSI staff to review (do not email because they have PII). Once approved by CSI staff, data from this form can be used to populate the Homeless fields (Homeless and Primary Nighttime Residence) in the school SIS.

Migrant Status
Schools should use the Migrant Student Survey found on the Migrant Education Program webpage to assist in the identification of students who may be eligible. Forms should be submitted through G-Drive. Final determinations will be made by CDE's Migrant Regional Contact.

Internal Forms and Processes
Schools may have internal forms and processes for collecting student data that is provided by school staff (ex: the determination of English learner, gifted, special education status following an identification process).

Staff Data Collection

New Hire Paperwork
Most of the fields in the Staff Profile interchange file and some fields in the Staff Assignment interchange file can be collected through new hire forms. Both of these interchange files are submitted for the Human Resources collection. Please access the current year *File Layout - CSI Additions* documents on the HR collection webpage to see a complete listing of the fields for each of these files.

CSI offers an editable New Hire Form and editable IDEA School Instructor Form for schools to adapt for their own purposes (on the Human Resources collection webpage).

Internal Forms and Processes
Schools may have internal forms and processes for collecting student data that is provided by school staff (ex: determination of a staff's assignment, salary, and contract days for the year).

III: Student Information System Resources

Schools should access the following resources when seeking SIS support:

5. Schools should utilize the SIS online community, trainings, and resources as the primary method for accessing support related to student information system set up and troubleshooting.
6. Each SIS vendor provides troubleshooting support through a ticket system if the available resources to do not address the specific issue you are experiencing.
7. Additionally, CSI has posted several SIS resources in the CSI Data Submissions Library to address common questions or challenges related to state reporting.
8. Finally, schools can reach out to the CSI Data Submissions Team with SIS questions related to state reporting.

Several data systems are programmed to extract data in a way that aligns to state and federal reporting requirements. The following lists which common data systems can be used to extract the various state and federal reports.

Collection	System(s) to Generate Files	Resource
October Count	SIS (PowerSchool OR Infinite Campus)	PowerSchool Start of the Year Guide PowerSchool Student Setup Infinite Campus Beginning of the Year Process
December Count	Infinite Campus* OR Enrich	IC IEP
HR	Excel or HR System	
Report Card March	Excel, PowerSchool or Infinite Campus	PowerSchool users can use the “Report Card March” state report extract. Infinite Campus users will need to use the Excel file provided by CSI.
Teacher Student Data Link	SIS (PowerSchool OR Infinite Campus)	Up to date SCED version crosswalk codes must be entered for each course offering at a school. Course completion status is required for all student records. Schools will need to post final grades in their SIS for the status to be included in the file submissions for TSDL.
End of Year	SIS (PowerSchool OR Infinite Campus)	
SPED End of Year	Infinite Campus* OR Enrich	
SPED Discipline	SIS (PowerSchool OR Infinite Campus)	PowerSchool Incident Management Quick Entry Guide Infinite Campus Entering Behavior Events & Resolutions
School Discipline	SIS (PowerSchool OR Infinite Campus)	PowerSchool Incident Management Quick Entry Guide Discipline Incident Setup Infinite Campus Entering Behavior Events & Resolutions
Civil Rights Data Collection	SIS (PowerSchool OR Infinite Campus) and/or Excel	The majority of data will be prepopulated by CDE from multiple state collections. CSI will work with schools on obtaining missing or incorrect data.

IV: School Collaboration by Data Collection Worksheet

SCHOOL CONTACT LIST FOR EACH COLLECTION

Use this table to record the name of the staff person at your school that fulfills each of these roles. The Data Submissions Contact will be responsible for working with these content experts on the completion of each of these data collections.

Collection	Contacts	Suggested Fields to Review
October Count	English Learner (EL) Coordinator:	Language Background, Language Proficiency, Language Proficiency Program
	Gifted & Talented (GT) Coordinator:	Gifted Fields (there are 14 of them)
	Special Education (SPED) Coordinator:	Primary Disability, Special Education Transition, Alternate Assessment Participation
	504 Coordinator:	Section 504 Handicapped
	Homeless Coordinator:	Homeless, Primary Nighttime Residence, Free/Reduced Price Lunch Eligible
	School Food Authority Contact:	Free/Reduced Price Lunch Eligible
	Postsecondary Counselor/Advisors:	Postsecondary Program Enrollment
	Business Manager:	Public School Finance Funding Status
	Registrar:	Entry Date, Entry Type, Exit Withdraw Date, Exit Withdraw Type # of students per grade in data report vs. # on class rosters
	Dean/Discipline Contact:	Expelled Education
	Attendance Clerk:	Total Days Attended/Excused/Unexcused, Habitually Truant Status, Total Days Missed Due to Out of School Suspensions
Human Resources	Human Resources (HR) Contact: SPED Coordinator:	All employees/contractors are included with accurate information All special education employees/contracts are included with accurate information
December Count	SPED Coordinator: HR Contact:	All special education students are included in the report with their service providers appropriately identified All special education service providers are identified appropriately for each special education student
Report Card March	School Programs Contact:	All Fields
School Discipline	School Discipline Contact:	All Fields
End of Year	EL Coordinator:	Language Background, Language Proficiency, Language Proficiency Program
	GT Coordinator:	Gifted Fields (there are 14 of them)
	SPED Coordinator:	Primary Disability, Special Education Transition, Alternate Assessment Participation
	504 Coordinator:	Section 504 Handicapped
	Homeless Coordinator:	Homeless, Primary Nighttime Residence, Free/Reduced Price Lunch Eligible
	School Food Authority Contact:	Free/Reduced Price Lunch Eligible
	Postsecondary Counselor/Advisors:	Postsecondary Program Enrollment
	Dean/Discipline Contact:	Total Days Missed Due to Out of School Suspensions
	Registrar:	Entry Date, Entry Type, Exit Withdraw Date, Exit Withdraw Type
	Attendance Clerk:	Total Days Attended/Excused/Unexcused, Habitually Truant Status, Total Days Missed Due to Out of School Suspensions
Teacher Student Data Link	School Academic Counselor: Teachers:	All 6-12th grade, tested subject courses are included
Special Education End of Year	SPED Coordinator:	All Fields

V: Overview of Data Collection Files and Error Reports

The following table lists the files required for each data collection as well as the various error reports a school can expect to receive in each collection.

Collection	System(s) to Generate Files	Files	Level 1 Error Report	Level 2
October Count	SIS (PowerSchool OR Infinite Campus)	Student Demographic Student School Association Title I (if applicable)	SD Error Report SSA Error Report Title I Error Report (if applicable)	October Count Error Report
December Count	Infinite Campus* OR Enrich	Child Participation **	Child Error Report Participation Error Report	DC Staff Error Report (sent to HR contact—see below) DC Student Error Report
HR	Excel or HR System	Staff Profile Staff Assignment	Staff Profile Error Report Staff Assignment Error Report	HR Error Report DC Staff Error Report
Report Card March	Excel, PowerSchool or Infinite Campus	Report Card March	Report Card March Error Report	N/A
Teacher Student Data Link	SIS (PowerSchool OR Infinite Campus)	TSDL Interchange	TSDL Interchange	N/A
End of Year	SIS (PowerSchool OR Infinite Campus)	Student Demographic Student School Association Title I (if applicable) Graduation Guidelines	SD Error Report SSA Error Report Title I Error Report (if applicable) Graduation Guidelines	EOY Error Report Attendance Report
SPED End of Year	Infinite Campus* OR Enrich	Child Participation	Child Error Report Participation Error Report	SPED EOY Error Report
School Discipline	SIS (PowerSchool OR Infinite Campus)	Discipline Interchange File	Discipline Interchange Error Report	Discipline Snapshot Error Report
Civil Rights Data Collection	SIS (PowerSchool OR Infinite Campus) and/or Excel	90+% of data is pre-populated by CDE so this collection is completed in an online system where schools can update data and access error reports directly.		

*While Infinite Campus has the ability to maintain special education data and extract it for state reporting, please note that some schools may be using a separate plan management system to maintain special education data. Please confirm which system your school is using to maintain and extract special education data for state reporting.

VI. Sample To Do List

Beginning of the Year

- ☐ **Complete the beginning of the year tasks in your SIS**. Each SIS has a resource guide that lists out all required activities. The setup of your SIS at the beginning of the year directly impacts the accuracy of the data extracted for all state collections throughout the year.
  - **PowerSchool Users**: Start of the Year Guide *(PowerSource login required to access OR access without a login using the PowerSchool Colorado State Reporting Help page)*
    - Confirm District Setup is complete
    - Confirm School Setup is complete
    - Confirm Student Setup is complete
    - Confirm Discipline Incident Setup is complete
    - Confirm Attendance Setup is complete
    - Confirm Graduation Guidelines Test Setup is complete (schools with high school grades only)
  - **Infinite Campus Users**: Beginning of School Year Process *(Campus Community login required to access)*
- ☐ **Send out confirmation of attendance to determine where students went after they left your school the previous year.** This is applicable to 1) schools with highest grade level served as 8th grade or lower and 2) schools where any students were coded in the previous year as expecting to continue at your school but did not show up this school year. Collect this documentation to support the October Count and the EOY collections. While this exit coding can be input to the SIS for some students, students who are now attending a grade level not offered by your school will need to be manually updated through the EOY process. See the CDE Adequate Documentation webpage for record request guidance and Confirmation of Enrollment/Attendance forms.
- ☐ **Ensure summer graduates are reflected in End of Year data submission**. *This is only applicable to schools serving high school grades.* If the school has additional graduates who weren't identified in the SIS prior to the system roll over or who weren't included in the last End of Year Student School Association interchange file submitted to CSI, please inform CSI so this can be accurately reflected in the latest End of Year file for your school.
- ☐ **Review your school's process for receiving free and reduced price lunch statuses for students.** More information can be found on the CSI Free and Reduced Price Lunch Eligibility webpage as well as the CSI October Count Audit Handbook (see the Free and Reduced Lunch Eligibility Checklist appendix).
  - For schools using a School Food Authority (SFA), please connect with the SFA (including the CSI SFA) to confirm that they will provide a file that includes free and reduced-price lunch statuses as of Count Day and then periodically throughout the remaining school year.
  - For schools not using a School Food Authority (SFA), please ensure you have a process for collecting the Colorado Family Economic Data Survey Forms (FEDS Forms) from families, determine eligibility, and input eligibility into your SIS. Be sure to update your SIS as of count

day and then throughout the remaining school year. CSI will assist with providing Direct Certification results from count day to each of these schools.

- Connect with your school's program contacts (ELL, GT, SPED, Homeless) to ensure data for new students and returning students has been added or updated in the SIS. (Some data fields like funding status for the October Count roll over the prior year status which may not be accurate for the current year). Newly identified students and re-designated students should have their data updated accordingly in the SIS as soon as practical. October Count data collection considers these student types for funding determinations.

- **Check schedules for gaps (or for students that do not have enough courses to receive full-time funding).** Please review the guidance for how to use your SIS to identify students who do not meet full time funding criteria on the CSI October Count webpage. Any incorrect schedules should be fixed prior to Count Day. It is the responsibility of each school to ensure that students meet all criteria for part- or full-time funding!

- **Update no-shows in your SIS.** For students who were NOT enrolled in the previous school year, registered for this school year but did not show up, you should mark these students as no shows in your SIS so that they do not extract in your state reports. (Do NOT do this for students who were enrolled in the previous school year.) Schools should monitor enrollment headcounts in the SIS to ensure they are accurate (include checks on totals by grade level). **Ensuring this step is completed in your data will save a great deal of time and effort later due to errors and issues that will arise when these students are reported to the state as enrolled at other schools.**

    - PowerSchool Users: Search for and select the student, click the State/Province-CO link, and select "Yes" from the dropdown next to *Exclude from State Reporting.*

    - Infinite Campus Users: Search for and select the student, expand Student Information, click General, click on the enrollment record, and check the box below *No Show.*

- **Use the Record Checker tool for the October Count collection to ensure that attendance is set up correctly in your SIS and that student data is extracting correctly in your SSA file submissions.**

- **Check and update course information in your SIS.** Add any new courses for the year and make sure that all data fields are complete based on data fields in the TSDL Interchange File Layout – CSI Additions for the TSDL collection. All courses must be mapped to a valid version SCED code. Inactivate any courses that will not be taught for the current year.

- **Review the CSI Submissions Calendar plus the October Count submissions and audit related resources.** Note important October Count submission dates, review all training modules, and begin preparing a copy of the Audit Supporting Documentation Checklist (appendix in the CSI October Count Audit Handbook found on the October Count webpage.

During the October Count 11-Day Attendance Window

- **Check for students with missing attendance.** If students were absent on count day, confirm whether the student was in attendance during this school year prior to count day. If so, contact families of students who were absent on count day to ensure the student returns within 30 calendar days after the count day in order for the student to be eligible for funding. If not, adjust the student's funding code in your SIS as this student typically would not qualify for funding (unless they qualify under one of the specific transfer scenarios as defined in the current year CDE October Count Audit Resource Guide). A student is not eligible if they attended any other Colorado public school district between the pupil enrollment count date and the date in which attendance was resumed.

Schools can also review attendance accuracy by using the October Count Record Checker Tool and review of their SSA interchange file extract.

- It is critical for the October Count audit that attendance is completely accurate, so you should check it carefully.
  - In PowerSchool: Attendance → PowerTeacher Attendance (report showing which teachers have not taken attendance)
  - In Infinite Campus: Attendance → Classroom Monitor → Incomplete Teacher Attendance (follow up with these teachers so that they complete attendance)

End of Grading Term

- **Complete end of term tasks in your SIS**. Each SIS has a resource guide that lists out all required activities.

End of Year

- **Complete the end of the year tasks in your SIS**. Each SIS has a resource guide that lists out all required activities.
  - PowerSchool Users: End of Year Process Guide *(PowerSource login required to access OR access without a login using the* PowerSchool Colorado State Reporting Help page*)*
  - Infinite Campus Users: End of Year Checklist *(Campus Community login required to access)*
- Update school paperwork to align with updates to required data elements.
- Compare student registration paperwork with the current year Student Demographic and Student School Association interchange *File Layouts - CSI additions* documents to confirm all necessary fields and eligible codes are being collected.
- Compare new hire and returning staff paperwork with current year Staff Profile and Staff Assignment interchange *File Layouts - CSI additions* documents to confirm all necessary fields and eligible codes are being collected. Typically, updates to these files are highlighted in yellow. CSI additions are in green font. Alternately, scroll to the end of these documents to see a list of updates by date.
- For schools without an HR system that extracts the necessary Staff Profile and Staff Assignment interchange files, use the prior year files that CSI will provide for you as a starting point. Some columns will need to be updated (years of experience, job code if it changed, etc.) and some rows will need to be updated (remove those not employed for this school year, add those hired for this school year, etc.)

As Needed

- Update data system to reflect changes to student/staff information (enrollment, behavior, staff assignments, etc.) This may become a daily task during peak enrollment times. Some particular scenarios to consider:
  - As behavior incidents arise, be sure the appropriate school contact is updating the SIS accordingly.

        - PowerSchool users can access the Colorado Incident Management Quick Reference Guide (*PowerSource login required to access OR access without a login using the* PowerSchool Colorado State Reporting Help page*)*

        - Infinite Campus users can access the Behavior Management Tool *(Campus Community login required to access)*

    - **As new students enroll or staff are hired, verify if they have an existing SASIDs/EDIDs and request ones if they do not.** The process for requesting and updating SASIDs and EDIDs can be found on the CSI SASID/EDID Requests resource page.

    - **As students withdraw from your school, request records/confirmation of enrollment from the receiving school.** As records are received, update the students exit date, exit type, and always include a comment about the student exit within your SIS (where did they go). This is particularly important for students in grades 7-12 as students without adequate documentation will impact the school's dropout rate. A list of adequate documentation for each type of transfer (transfer to another public school, etc.) can be accessed on CDE's website: https://www.cde.state.co.us/datapipeline/seyadequatedocs

- ☐ **Request/update your SIS so it has the latest state reporting updates.** Each SIS vendor will email the technical contact when a new release is available (cloud-based SIS versions typically update automatically). Release notes will identify whether any of the updates impact state reporting. Information about each SIS's version is included in each CSI Weekly Update Email. Schools can use this information to determine whether an update is needed if they are not cloud based with automatic updates.

Daily

- ☐ **Ensure attendance is being taken for all classes.** Timely recording of attendance will ensure the October Count and Attendance data (impacts October Count funding and accountability) are accurate. Follow up with staff who have not taken attendance. To check for classes with missing attendance:

    - PowerSchool users can access attendance monitoring through System Reports → PowerTeacher Attendance. Review the PowerTeacher Attendance Report for more information *(PowerSource login required to access OR access without a login using the* PowerSchool Colorado State Reporting Help page*)*

    - Infinite Campus users can access attendance monitoring through Attendance → Classroom Monitor. Review the IC Classroom Monitor resource *(Campus Community login required to access)*

Weekly

- ☐ **Review the CSI Weekly Update Email** (more detail under the Resources section above).

- ☐ **Update data system to resolve errors and resubmit files to CSI to check for error clearance.** It is expected that schools work regularly on resolving errors in each data collection to ensure the CSI deadlines are met. Regular work on resolving errors throughout the year reduces the workload for schools during peak collection times.

Monthly

- ☐ Review data in the system. Some ways to review your data include:

- **Check for blanks.** See the Using Excel for Importing and Reviewing Data for how to do this in Excel.
- Generate a list of student groups (ELL, GT, SPED) from your SIS and share it with appropriate school contacts (ELL Coordinator, GT Coordinator, and SPED Coordinator). School contacts should ensure the list is accurate (i.e. not only that listed students are accurate but also that there are no missing students from the list.)
- **Check entry/exit dates/types for accuracy.** Compare dates against attendance records as well as withdraw paperwork. For transfers out of your school, connect with the receiving school to ensure no overlap in enrollment. (While this will not generate an error if the student is transferring out of the CSI portfolio, if the student is transferring from one CSI school to another, an overlap in enrollment will generate an error.) The CSI Data Submissions Team sometimes has to spend quite a bit of time working with schools to resolve these errors, so schools can help reduce this time by proactively updating their SIS with the correct coding.

Annually

- [ ] Update student enrollment/staff hire forms to align with state updates to required data.
- [ ] Print current year Colorado Family Economic Data Survey forms (FEDS) from the CSI Free and Reduced Lunch Eligibility webpage for families to complete (for schools not participating in a federal child nutrition program/SFA). Do not use prior year forms and do not obtain family signatures until July 1 or after for the new year.
- [ ] Update annual calendar and bell schedules (and confirm alignment to statutory minimums for full time funding. See the CSI School Calendar and Instructional Hours webpage for resources). Copies of each are due to CSI in the Spring for the following school year (check the CSI Submissions Calendar for exact date). Updated versions should be submitted to CSI if any changes are made to either the calendar or bell schedules.

VII. Handy Excel Skills

While data management systems typically have multiple features to review data within the system, schools have the option to also use Excel (or a similar spreadsheet software) to review data prior to submission. Below are some of the most commonly used skills Data Submissions Contacts have used to streamline the submissions process and/or reduce the number of errors on their initial submission.

Working with .CSV files
When files extract from your data management systems, they typically download in a .CSV (comma separated values) format. If you open the file without following the below instructions, the file can lose its formatting, including any leading zeroes.

- In order to keep the correct formatting when extracting a file, do NOT choose the option to open it; choose the option to save it to your computer instead.
- You can open a saved .CSV file to review it, but don’t save changes to it or the formatting will be lost. To open a .CSV file that you want to edit, follow the directions on importing to Excel in order to retain the formatting.
- To rename a saved .CSV file to the standard naming convention used for data submissions, simply navigate to where the file downloaded on your computer (by default, it will download to your Downloads folder), right click on the file name to Rename it.

Conditional Formatting
Once you have imported the data from the .CSV format into Excel, you can skim the columns and rows, checking for blank cells. One way to make the blank cells more obvious is to use Conditional Formatting to change the blank cells to a bright color. Directions on how to do this are in the **Using Excel for Importing and Reviewing Data** resource (recording).

Filters
Once you have imported the data from the .CSV format into Excel, you can use Filters within Excel to check for any unusual data by column. Directions on how to do this are in the **Using Excel for Importing and Reviewing Data** resource (recording).