

Steps for Completing the HR Data Collection

1. Review the training modules pertaining to the steps of the data submissions process located on the [General Data Submissions Resource Page](#). This will guide you through all the necessary steps of any data collection.
2. The trainings specific to the collection are also available on the HR homepage of the CSI website. The two trainings include a [General Overview](#) and a [New this Year](#) training module along with a Data Collection Prep document. Schools with newer submissions staff should plan both trainings and the document.
3. Familiarize yourself File Layout and Definition documents reviewing the latest [Staff Profile](#) and [Staff Assignment](#) File Layout and Definition Documents with CSI Additions for the current year. These files contain a listing of all fields collected and the proper coding options associated with them.
4. Update your existing Staff Profile and Staff Assignment starting point files (for returning schools) or start adding the required data into the latest [Staff Profile](#) and [Staff Assignment](#) templates (for new schools), using the File Layout and Definition Documents as guides for what data to input for each field.
 - a. Make sure fields have the necessary leading zeroes! Ex: the Gender column should include 01 and 02, NOT 1 and 2.
 - b. Verify you are **not** updating fields that have already been updated by CSI for your convenience. The full listing is available on the Collection Prep Quick Training.
 - c. Ensure that you are marking all applicable grade levels for staff who are teachers (201-206 Job Classification).
 - d. All fields must be populated including ones that just contain zeros. The only field that can be left blank is the End Date of Assignment.
5. Save your files using the standard naming convention (SchoolCode_SchoolAbbreviation_FileName_Date) Examples:
 - i) 1505_CMA_StaffProfile_09302023
 - ii) 5453_MMS_StaffAssignment_09302023
6. It is recommended that schools run their files through the Record Checker at this point. If issues are identified, they can be corrected prior to initial submittal. Both the [Tool](#) and [Instructions](#) are available on the Human Resources page or in the links above.

7. Once your files include all required information (or before the initial file submission deadline), upload them to our secure file transfer system. CSI will be using Google Drive again in the 23-24 school year.
 - a. You do not need to wait until the initial file submission deadline to submit. Submit early and often! It is expected that schools submit at least monthly, if not more, while the collection is open to ensure errors are being cleared and any changes are reflected.
8. Email submissions_CSI@csi.state.co.us to let us know that you've uploaded your files to Google Drive. CSI will process those files in the data pipeline and extract error reports.
9. You should then receive an email from us letting you know that error reports are available in the G-Drive, download the error report(s). Use these reports to make corrections on your original files.
 - a. There should be an error report for the Staff Profile and an error report for the Staff Assignment file. These error reports are referred to as Level 1 error reports.
 - b. Once you have cleared your Level 1 errors, CSI will run the HR snapshot to generate one Level 2 error report, referred to as the HR snapshot error report.
10. Using the error reports as a checklist, walk through each error (i.e. row of data in the error report), updating your Staff Profile or Staff Assignment Excel file to resolve the error. Do not update the error report as these cannot be processed.
 - a. For guidance on how to resolve various errors, please make use of [CSI's Troubleshooting Errors](#) document. There's a tab for Staff Profile Level 1 Errors, Staff Assignment Level 1 Errors, and HR Level 2 Errors.
 - b. Please note that all updates should be made to your most recently updated Staff Profile and Staff Assignment Excel files.
 - c. If you are unsure of how to resolve a particular error, please review resources listed on the [HR homepage](#) for resources that may aid in resolving. If this does not result in a solution, email submissions_CSI@csi.state.co.us with the error code and CSI staff will provide assistance.
11. Go back to #4 above and walk through this process again until you have cleared all errors.