# Regular Phase Instructions

# Student End of Year (SEY) Snapshot



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### Overview

The 'Regular Phase' is the primary data collection and clean-up phase for the Student End of Year (SEY) snapshot. During the regular phase, district must upload the Student Demographic, Student School Association, and Graduation Guidelines files to create the Student End of Year Snapshot. For more information about these files see the <a href="Student Endodes Student">Student</a> Interchange website.

The SEY data snapshot compiles information (data elements) from multiple data files uploaded by the school district and CDE.

### **Required Student Interchange Files:**

- Student Demographic (DEM)
- Student School Association (SSA)
- Graduation Guidelines (GG)

#### **Additional Data Files:**

- <u>Title I Interchange</u> (Targeted Assistance Schools)
- Special Education IEP Interchange (Special Education Students only)
- Adjustment File (If prior year exit adjustments are needed for HSED transfers, expulsion, and dropouts)

#### Data calculated by CDE through support files:

- School Wide Title I
- Foster Student List
- Migrant Student List
- CTE Student List

The Regular Phase begins when the snapshot opens in May and ends the first week of September. Please see the collection timeline posted on the SEY website for specific dates.

## Regular Phase Steps

- 1. Upload Student Interchange Files (DEM, SSA, GG)
  - a. Upload Title I Interchange if your district has targeted assistance schools.
  - b. Upload Special Education IEP interchange files if your student has Special Education students.
  - c. Upload adjustment file if prior year exit adjustments are needed. This file is typically utilized during the Cross LEA phase, but can be uploaded at any point throughout the collection.
- 2. Resolve interchange errors.
  - a. Records with errors on the DEM or SSA files will not pull into the SEY snapshot.
  - b. Records with errors on the GG file may cause errors on the SEY snapshot for graduating students. (School Exit Type 90, 95, or 96)
- 3. Create a SEY snapshot.
- 4. Resolve SEY Snapshot errors.
  - a. Update corresponding student interchange file data to correct SEY snapshot errors.
- 5. Repeat steps 1 through 4 as needed.
  - a. Request reporting exceptions if needed.
- Validate SEY data using CEDAR/COGNOS reports.
  - a. Graduation/Completion/Dropout/Mobility/Stability rates
- 7. Submit error-free SEY snapshot by the September deadline.
  - a. SEY~LEYApprover role in Identity Management (IdM) required.

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## **Identity Management Roles**

SEY data respondents must be assigned permissions to both the Student End of Year collection and the Student Interchange collection in Identity Management (IdM) to complete the collection. Your district's Local Access Manager (LAM) assigns accounts/privileges in IdM for your district. This website provides more information about IdM and access management instructions for LAMs.

Application	Collection	User Role	Access Level	Notes
Pipeline	Student Interchange	LEA User	Upload and edit records for the DEM, SSA, & GG files.	Required for SEY data respondents.
Pipeline	Student End of Year	LEA User	Create Snapshot	Users with this role can complete the majority of the SEY collection but will need support from a LEA Approver for a few steps.
Pipeline	Student End of Year	LEA Approver	Create Snapshot, submit snapshot, download sign-off form	At least one person in the district must have this role.
Pipeline	Any	LEA Viewer	View CEDAR/COGNOS reports related to the assigned collection – cannot edit data.	Useful role for district staff who need access to collection related CEDAR/COGNOS reports for data validation but are not actively completing the data collection.

Note: A user may only have <u>one</u> role per collection in IdM. Users assigned to more than one collection role will not be able to login to Data Pipeline correctly because the user roles are competing and will lock up their account.

## **Uploading Files**

These steps can be used to upload any file into data pipeline, not just the three primary files needed to complete the SEY collection. One common supporting file for the SEY collection is the *Adjustment File*. Adjustment files are used to provide additional information about a 7<sup>th</sup>-12<sup>th</sup> grade students who were previously enrolled in a district and did not enroll in the current school year. This file is typically used during the Cross LEA phase but can be uploaded at any point during the SEY collection.

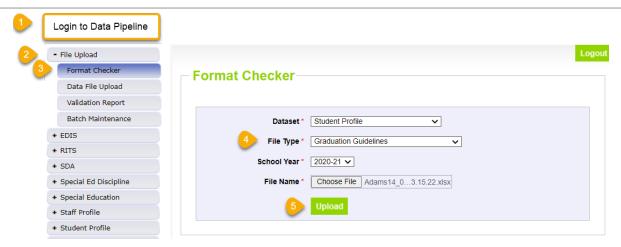
#### **Format Checker**

The format checker can be used to ensure a file is in the proper format for the given file type and school year.

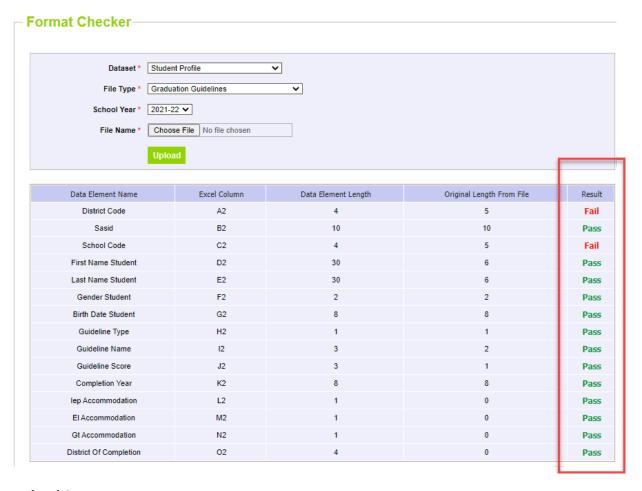
- 1. Login to Data Pipeline
- 2. Select File Upload
- 3. Select Format Checker
- 4. Complete the Dropdown menus, indicating the specific file you are uploading.
  - a. Dataset = Student Profile
  - b. File Type = Student, Student School Association, Graduation Guidelines, or Adjustments
  - c. School Year = SEY collection year (Note: Other years may be available, so please ensure you select the correct year)
  - d. Organization/LEA = Your district
  - e. File Name: Choose File → Select file from your computer
    - i. .csv, .xls, .xlsx (.xlsx is preferred)
    - ii. Spaces are not allowed in the file name
- 5. Select *Upload*

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The format checker screen shows data fields that are the incorrect length based upon the first row of data. This may indicate the file layout does not have the data elements listed in the correct order or that leading zeros are missing for some data fields. Note: It is possible for a file to pass the format checker and still have underlying errors.



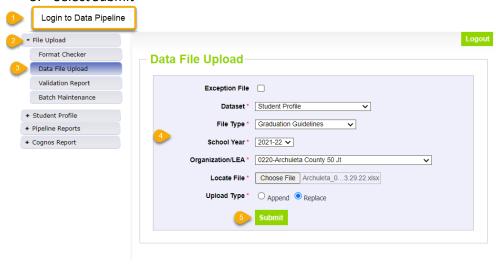
### **File Upload Steps**

- 1. Login to Data Pipeline
- 2. Select File Upload
- 3. Select Data File Upload

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- 4. Complete the Dropdown menus, indicating the specific file you are uploading.
  - a. Dataset = Student Profile
  - b. File Type = Student, Student School Association, Graduation Guidelines, or Adjustments
  - c. School Year = SEY collection year (Note: Other years may be available select the desired year)
  - d. Organization/LEA = Your district
  - e. File Name: Choose File → Select file from your computer
    - i. .csv, .xls, .xlsx (.xlsx is preferred)
    - ii. Spaces are not allowed in the file name
  - f. Upload Type = Append or Replace
    - i. Relace is recommended
- 5. Select Submit



A message will be displayed across the top of the screen indicating a batch number or that there was an error uploading the file. Data pipeline sends an email to data respondents once the file has processed. This email will indicate the number of records uploaded into data pipeline and the number of errors related to this file upload. If you receive an email indicating a file upload error, double check the formatting of your file and try again. Alpha characters or symbols included in data fields that are numeric only is a common cause for file uploads to fail. This includes if an alpha character/symbol in a single data field for a single row of data.

SEY Tip: Upload your Student Demographic file first and allow it to fully process before uploading your Student School Association and/or Graduation Guidelines file. All three files need to fully process before creating a SEY snapshot.

Note: File uploads are the preferred method for updating data during the Regular and Cross LEA phases of the SEY data collection. During the Post-Cross phase data must be updated using the edit record screen. See the Data Pipeline Tools section below for directions.

### **Validation Report**

The Validation Report shows a high-level view of the errors for a specific file upload.

- 1. Login to Data Pipeline
- 2. Select File Upload
- 3. Select Validation Report
- 4. Complete the Dropdown menus, indicating the specific file you are uploading.
  - a. Dataset = Student Profile
  - b. File Type = Student, Student School Association, Graduation Guidelines, or Adjustments

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- a. School Year = SEY collection year (Note: Other years may be available select the desired year)
- c. Organization/LEA = Your district
- d. Batch ID = number and date of the specific file upload as indicated on the data file upload screen and/or the subsequent email.

#### 5. Select View Report

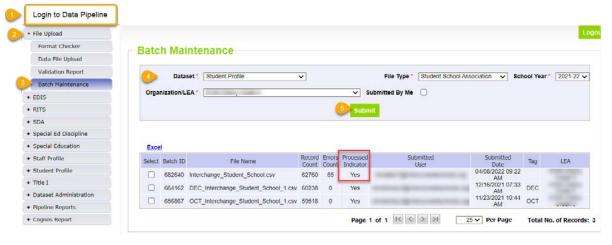


#### **Batch Maintenance**

This screen provides information regarding the status of a file upload and can be used to determine if a file has completed processing.

Note: If a file is taking a significant amount of time to process (an hour or more) and you have not received an automated email from Data Pipeline regarding the file, please contact the SEY collection lead for support.

- 1. Login to Data Pipeline
- 2. Select File Upload
- 3. Select Batch Maintenance
- 4. Complete the Dropdown menus, indicating the specific file you are uploading.
  - a. Dataset = Student Profile
  - b. File Type = Student, Student School Association, Graduation Guidelines, or Adjustments
  - b. School Year = SEY collection year (Note: Other years may be available select the desired year)
  - c. Organization/LEA = Your district
- 5. Select Submit



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## Creating a Snapshot

Creating a snapshot triggers the data elements from the source files (DEM, SSA, GG) to combine with any additional information (Title 1, SPED Interchange, Adjustments file) and internal information called 'internal flags' to create the SEY snapshot file. This also triggers the Data Pipeline system to check all the business rules for the snapshot to look for errors and warnings (or clear errors/warnings based upon updated Student Interchange files).

Note: Whenever a snapshot is created during the Regular Phase and Cross-LEA phase, all existing SEY snapshot records are removed and replaced by the new snapshot information. During the Post-Cross LEA phase snapshots are only updated. This means only data for specific students/scenarios is updated.

### **Snapshot Creation Steps**

- 1. Login to Data Pipeline
- 2. Select Student Profile
- 3. Select Snapshot
- 4. Complete the drop-down menus
  - a. File Type = Student End of Year
  - b. School Year = current school year
  - c. Organization/LEA = Your district
- 5. Select Search
- 6. Select Confirm Snapshot Creation



A message will display across the top of the screen indicating a snapshot creation has been triggered and is processing. You will receive a notification email from Data Pipeline once the snapshot has completed processing. If a snapshot creation is already in progress, you will receive a message to ask you to try again later.

Snapshot creation triggered and processing. A notification email will be sent upon completion.

Snapshot create/update/validate already in progress. Please try again later.

Note: Snapshots may take a while to process, especially for larger school districts. If your snapshot is taking a significant amount of time to process (3 hours or more), please contact the SEY data collection lead.

## Checking Business Rules: Errors & Warnings

Business rules are the list of errors and warnings that are checked when a file is uploaded, or a snapshot created, for a specific data collection. They help ensure data accuracy by alerting you to common coding irregularities. SEY business rules are focused on ensuring accurate data when calculating graduation/completion, dropout, and mobility/stability

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rates. Whereas student interchange business rules (file specific) address common data irregularities that apply to the several data collections that utilize the student interchange files.

Most business rules are related to a specific student's information, but some indicate a data inconsistency that applies to all data within a data field. These are sometimes referred to as 'snapshot level' or 'collection level' errors/warnings. For example, a warning triggers if no students are indicated as being Free/Reduced lunch eligible. This might indicate missing information for many students instead of just one student as it is unlikely (thought not impossible) that no students within the district are Free/Reduced Lunch eligible within a given year.

#### **Errors**

Errors must be addressed to submit data for a given data collection such as Student End of Year. Errors on student interchange files will prevent a student's records from pulling into the SEY snapshot. Errors can be addressed by updating the related data field and reuploading your interchange files or by requesting an exception. For more information about exceptions review the documentation posted on the <a href="SEY Website">SEY Website</a> in the Templates section (exception request template spreadsheet and how to request an exception PDF).

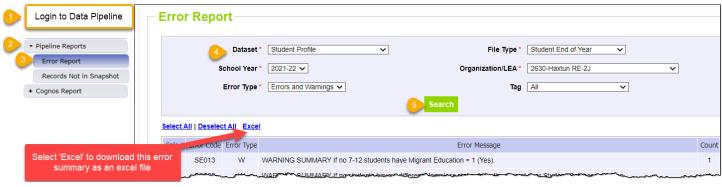
### Warnings

Warnings indicate possible data inconsistencies/coding issues. It is beneficial to review warnings to ensure data accurately reflects a student's educational history. Some SEY warnings indicate issues that will turn into errors in the post collection phases if not addressed. A snapshot <u>can</u> be submitted even if warnings are present. During the SEY collection it is common for warnings to indicate a student's demographic information or instructional program information has changed from the Student October to the Student End of Year collection.

## Data Pipeline

The data pipeline error report is the preferred method for reviewing errors.

- 1. Login to Data Pipeline
- 2. Select Pipeline Reports
- 3. Select *Error Report*
- 4. Complete the drop-down menus for the desired file/snapshot
  - a. Dataset = Student Profile
  - b. File Type = desired file/snapshot (Student, Student School Association, Graduation Guidelines, Student End of Year, Adjustments)
  - c. School Year = SEY collection year (Note: Other years may be available select the desired year)
  - c. Organization/LEA = your district
  - d. Error Type = Desired type of Business Rules (Errors and Warnings recommended)
  - e. Tag = None (SEY does not use Tags.)
- 5. Select Search



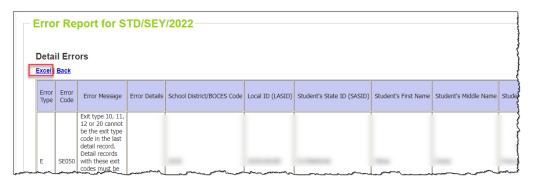
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To view specific student records that are triggering an error/warning, select View Details at the bottom of the screen.



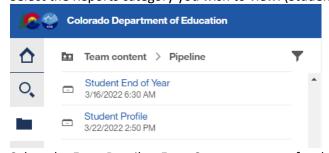
The detailed list of student records can be downloaded using the 'excel' button at the top of the new page.



### CEDAR/COGNOS

The Colorado Education Data Analysis and Reporting System (CEDAR) is often referred to as COGNOS since this is the software powering this reporting system. These two terms are synonymous. Data respondents automatically have access to the CEDAR/COGNOS reports that match their level of access in the Data Pipeline system. Student End of Year data respondents can view 'Student Profile' and 'Student End of Year' reports in CEDAR/COGNOS. Respondents with 'LEA Viewer' access to the Student End of Year collection may also view the Student End of Year reports.

- 1. Login to CEDAR/COGNOS
- 2. Select the *Pipeline Reports* folder on the left.
- 3. Select the Reports category you wish to view. (Student Profile or Student End of Year)



- 4. Select the Error Detail or Error Summary report for the file/snapshot you wish to review.
  - a. Select 'Student Profile' to view Student Demographics, Student School Association, Adjustments, or Graduation Guidelines error reports.

Pipeline Reports

b. Select 'Student End of Year' to review the Student End of Year error reports.

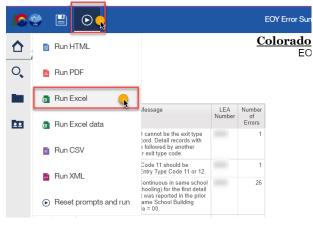
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- 5. Complete the drop-down menu selections.
- 6. Select Finish to view the report. Finish

Reports can be downloaded using the 'run excel' feature at the top of the page.



## Reporting Exceptions

Reporting Exceptions, or 'exceptions' refer to overriding Data Pipeline errors. CDE occasionally overrides these business rule errors because, although errors are legitimate, the case needs to be corrected to accurately reflect the student's educational history. This occurs under unique circumstances when a student's educational history does not follow the anticipated coding patterns outlined in the business rules for an interchange file or snapshot. The student's coding must still fall within the parameters of the data collection for an exception to be granted.

Typically, exceptions are used to clear errors, but in some cases an exception may be used to clear a warning too. Exceptions used to clear warnings are most often used during the Post-Cross LEA phase of the SEY data collection cycle. Exceptions are also used during the Post-Cross LEA phase to allow approved data updates for records that are not causing SE900 series errors.

Most reporting exceptions are requested using an exception request template, found on the <u>SEY website</u>. Some SEY reporting exceptions may require additional supporting documentation.

Please see the SEY Reporting Exceptions how-to guide posted on the <u>SEY website</u> for detailed information regarding the steps needed to request an exception and possible additional supporting documentation needed for some SEY exception request.

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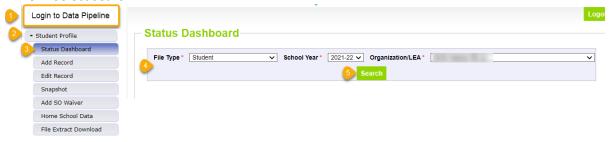


## Data Pipeline Tools: Student Profile

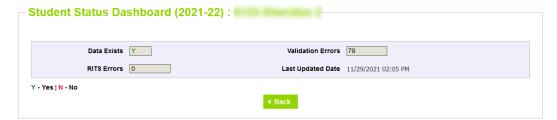
### Status Dashboard

The status dashboard shows the last date a file or snapshot was updated, the quantity of validation errors, and if data has been submitted (locked) for a collection.

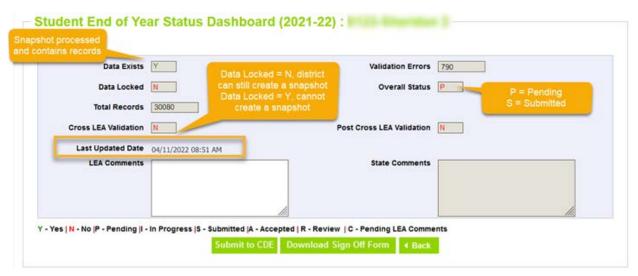
- 1. Login to Data Pipeline
- 2. Select Student Profile
- 3. Select Status Dashboard
- 4. Complete the drop-down menus
  - a. File Type = desired file (Student, Student School Association, Graduation Guidelines, Adjustments, Student End of Year)
  - b. School Year = current year
  - c. Organization/LEA = your district
- 5. Select Search



## Sample Interchange File Dashboard:



### Sample Student End of Year Dashboard:



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Note: Order of file submission and snapshot creation matter. A snapshot won't reflect the changes made to a file upload unless the last updated date for the snapshot is later than the last updated date for a file upload.

Recommended Order (always create a snapshot last)

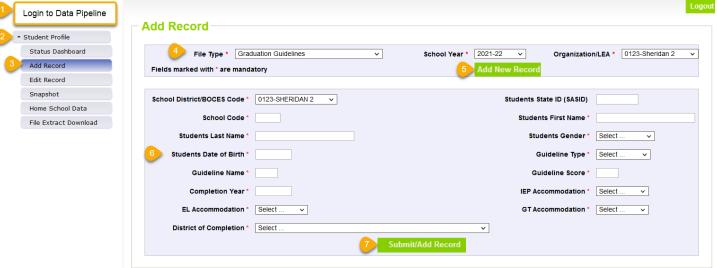
Student Demographic → Student School Association → Graduation Guidelines → Student End of Year Snapshot

#### Add Record

This screen can be used to add a single record to a Student Interchange file without uploading a new file. This is typically reserved for use during the post collection phases of the SEY collection when working with only a few records.

Important Note: A new file upload will delete any manually added records, so only use this step if you are no longer planning to upload new data files *or* if you have also updated your file before the new upload.

- 1. Login to Data Pipeline
- 2. Select Student Profile
- 3. Select Add Record
- 4. Complete the drop-down menus for the desired file.
  - a. File Type = desired file (Student, Student School Association, Graduation Guidelines, Adjustments)
  - b. School Year = current year
  - c. Organization/LEA = your district
- 5. Select Add New Record
- 6. Complete all fields on the add record screen.
  - a. \* indicates required fields (SASID is always a required field)
  - b. Zero fill any optional fields
  - c. Refer to the file layout on the <u>Student Interchange</u> website for more information about each data field on a specific file. (Adjustment File layout is on the <u>SEY website</u>)
- 7. Select Submit/Add Record



#### Edit Record

This screen can be used to update a record to a Student Interchange file without uploading a new file. Filters allow you to search for records in error (interchange level errors only) or to search for an individual student by SASID. This is typically reserved for use during the post collection phases of the SEY collection when working with only a few records.

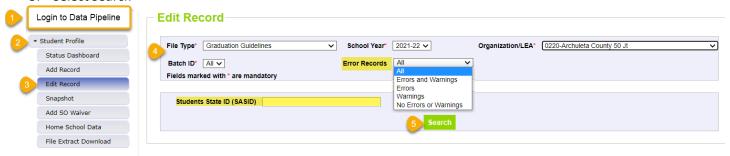
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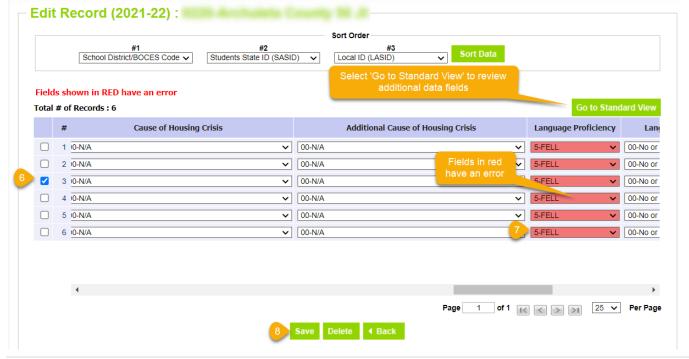
Important Note: A new file upload will delete any manually added records, so only use this step if you are no longer planning to upload new data files *or* if you have also updated your file before the new upload.

- 1. Login to Data Pipeline
- 2. Select Student Profile
- 3. Select Edit Record
- 4. Complete the drop-down menus for the desired file.
  - a. File Type = desired file (Student, Student School Association, Graduation Guidelines, Adjustments)
  - b. School Year = current year
  - c. Organization/LEA = your district
  - d. OPTIONAL: Error Records = desired category
  - e. OPTIONAL: Student State ID (SASID) = Student's SASID

#### 5. Select Search



- 6. Check the box indicating the record being updated.
- 7. Input the updated information into the desired data field. Some fields are drop-down menus and others are text fields.
  - Use the scroll bar across the bottom of the screen to locate the desired data field.
  - b. If the desired data field is not showing, select 'Go to Standard View' to view additional data fields.
- 8. Select Save
  - a. Use the *Delete* button to delete the entire selected record.



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### File Extract Download

A copy of a desired student interchange file or the SEY snapshot can be extracted from data pipeline for future reference. This is especially beneficial if you want to download a copy of an interchange file after you've made several manual additions or edits to the data, allowing you to have record of those updates.

- 1. Login to Data Pipeline
- 2. Select Student Profile
- 3. Select File Extract Download
- 4. Complete the drop-down menus
  - a. File Type = desired file (Student, Student School Association, Graduation Guidelines, Adjustments, Student End of Year)
  - b. School Year = current year
  - c. Organization/LEA = your district
  - d. Batch ID = All (or desired date/time of a file upload)
  - e. Extract Type = desired value
  - f. File Content Type = CSV, TEXT, or Excel
  - g. Records Edited Online = All Records or Online Edits
- 5. Select Download Standard Extract
- 6. Open the downloaded file and/or save it to your computer.



## Validating Data

A file/snapshot may still have data inaccuracies even if no business rules are triggering for that file/snapshot. To support districts in validating their data there are many CEDAR/COGNOS reports available for review. Student End of Year CEDAR/COGNOS reports are focused on the information needed to accurately report a student's educational history and validating graduation, completion, dropout, mobility, and stability rates.

After you've successfully created an error free SEY snapshot, use CEDAR/COGNOS reports to review graduation, completion, dropout, mobility, and stability rates for your district/schools. Look for data that seems inconsistent with prior year information or with the known circumstances of your district/schools.

For more information about available CEDAR/COGNOS reports and directions for navigating CEDAR/COGNOS, please see the SEY CEDAR/COGNOS Report Guide posted on the SEY website under the 'Rate and Report Information' section.

## Submitting SEY Snapshot

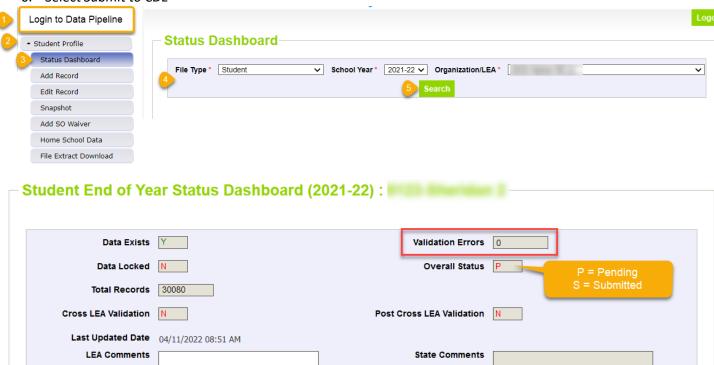
To complete the Regular phase, submit your SEY Snapshot. This will lock your data and indicate to the CDE Collection lead that you are ready for the next phase of the data collection. The submission button is located on the status dashboard. Only snapshots with zero validation errors can be submitted.

- 1. Login to Data Pipeline
- 2. Select Student Profile

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- 3. Select Status Dashboard
- 4. Complete the drop-down menus
  - a. File Type = desired file (Student, Student School Association, Graduation Guidelines, Adjustments, Student End of Year)
  - b. School Year = current year
  - c. Organization/LEA = your district
- 5. Select Search
- 6. Select Submit to CDE



Y - Yes | N - No | P - Pending | I - In Progress | S - Submitted | A - Accepted | R - Review | C - Pending LEA Comments

Submit to CDE

Download Sign Off Form

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