



U.S. DEPARTMENT OF EDUCATION

EDPass

EDPass User Guide

Version 2.0

March 2024

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March 2024

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PREFACE

This user guide is for the EDPass application. EDPass is used to submit data for *EDFacts*.

EDFacts is a collaborative effort among the U.S. Department of Education (ED), state education agencies (SEAs), and industry partners to improve the quality and timeliness of education information. *EDFacts* is the foundation and primary collection system for elementary and secondary education data, and a centralized information management tool for ED and SEAs. By centralizing ED's data collection and business intelligence capabilities within one repository, *EDFacts* brings a critical level of coordination and efficiency among Program Offices within ED, and reduces the burden put upon states to report data to ED.

This guide will be updated when changes are made to EDPass.

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1.0 Introduction

EDPass is used by SEAs to submit data to the U.S. Department of Education (ED). This document explains how to:

- Update the State Submission Plan (SSP)
- Upload files
- Review data quality results and add data notes
- Download data
- Complete metadata collections
- Submit data files and metadata to ED

All date and times in EDPass are Eastern Time Zone (ET).

1.1 Technological Requirements

EDPass works on internet browsers Google Chrome and Microsoft Edge versions released 2022 and later.

1.2 Availability

EDPass is unavailable from 8:00 a.m. ET to 2:00 p.m. ET on Saturdays for regularly scheduled maintenance.

After a due date, EDPass will be closed for uploading, adding, or changing data notes, or submitting file specifications (FSSs) or metadata collections that were due. EDPass SEA managers can still make changes and additions to user and role management. Authorized users can still make changes to the SSP.

Due dates are available in the [Data Submission Organizer](#) on the *EDFacts* Community of Practice site.

1.3 Concurrency

EDPass is designed to allow multiple users within the SEA to access the application. For instance, one user can upload data files while another is resolving data quality errors by adding data notes. However, if two users work on the same screen (or page) simultaneously, there is a risk that one of the users' inputs will be omitted; the data saved last will be the data written into the database. To avoid confusion and omission of data, assign responsibilities to try and avoid two users working on the same pages at the same time.

1.4 Technical Assistance

In addition to this guide, the *EDFacts* Partner Support Center (PSC) can assist users with EDPass.

The PSC is available between 8:00 a.m. – 6:00 p.m. ET, Monday through Friday, excluding federal holidays. The PSC contact information can be located on the [EDFacts Initiative Contact Us](#) page or by using the following options:

Telephone: 877-457-3336 (877-HLP-EDEN)

Telecommunication Relay Services (TRS): *If deaf, hard of hearing, or have a speech disability, please dial 7-1-1 to access telecommunications relay services.*

Email: EDFacts@ed.gov

Website: [PSC Self-Service Center](#)

1.5 High-level Process Overview

Below is a high-level overview of the process in EDPass from upload to submission:

1. START on the Upload Page: Upload data file(s) to EDPass (review [Section 4.2](#) for upload sequence)
 - If a status of *Format* or *File Errors* are received, resolve and re-upload
 - If a status of *Upload Successful* is received, move on
2. Upon successful upload, data quality business rules are run against the data
3. Submission List: Navigate to the Submission List to review the status of successfully uploaded files and required metadata collections:
 - On the *Data Submission List* (DSL) tab (default view):
 - Access the SSP via the kebab menu for each file specification
 - If a status of *ERRORS* is displayed, the file has data quality errors
 - Select **DQ Results** from the kebab menu to access the Data Quality Results List to see an overview of the errors. To download this page, select the download icon
 - Select **VIEW DETAILS** to access the Data Quality Results Details page to see all instances of a particular data quality error
 - For *Rule Failures*: Resolve instances of errors by adding data notes
 - For *Data Errors*: Resolve instances of errors by updating the file accordingly and re-upload
 - To download a list of all data quality errors for the file specification, select **RUN REPORT** from the Data Quality Results page (after the report is run once, the button will display as **DOWNLOAD**)
 - If *Ready to Submit* is displayed, either the file did not trigger any data quality errors, or all errors were resolved.
 - All required levels of a file specification must be in a *Ready to Submit* status before data can be submitted to ED
 - Select the *Metadata Submission List (MSL)* to access the metadata collections.

- Select the kebab menu to access the data entry page of a metadata collection.
 - See the metadata user guides located on the [EDFacts Initiative](#) for guidance on completing the metadata collections.
4. Submit data by navigating to the submit screen from the kebab menu for each file specification.
 - The metadata collections are submitted as a data package with the respective file specifications

Important! Once data are considered final, select **SUBMIT DATA** from the kebab menu to navigate to the submit screen.

2.0 Getting Started

EDPass can be accessed through the [EDFacts Initiative](#) website or by navigating to the EDPass website: <https://edpass.ed.gov>.

2.1 Signing into EDPass

Upon accessing the EDPass website, accept the *Terms of Service* agreement by selecting the checkbox next to “I agree.”

Click **SIGN IN WITH LOGIN.GOV** and the system will redirect you to enter your Login.gov credentials. Enter one form of multi-factor authentication (previously set up). Once accepted, the system will redirect to the EDPass landing page.

2.2 Signing out of EDPass

To minimize security risks, sign out of EDPass when the application is not being used. To sign out, click the user icon on the top right-hand corner of the screen and select **Logout** from the dropdown. Before signing out, save changes to avoid losing work.

After 2 minutes of inactivity, a timer in red font will appear in the upper right-hand corner counting down to when EDPass will automatically sign out the user (see fig. 2.1). Automatic sign out occurs after 20 minutes of inactivity. Simply moving the computer mouse resets the timer.

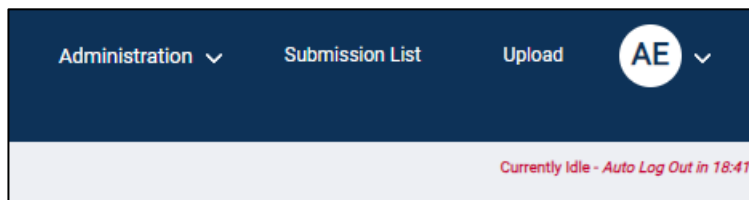


Figure 2.1: Inactivity timer appears in the top right corner and counts down

2.3 EDPass Landing Page

After successfully logging in, the landing page will display (see fig 2.2).

The top of the landing page contains links to:

- Administration (if an SEA EDPass Manager)
- Submission List
- Upload

The middle of the page contains:

- **Quick Links**
 - Links to *EDFacts* reporting documentation
 - Links to EDPass-related documentation
- **We are here to help**
 - *EDFacts* PSC contact information

The bottom of the page provides the Paperwork Burden Statement (see fig 2.2).

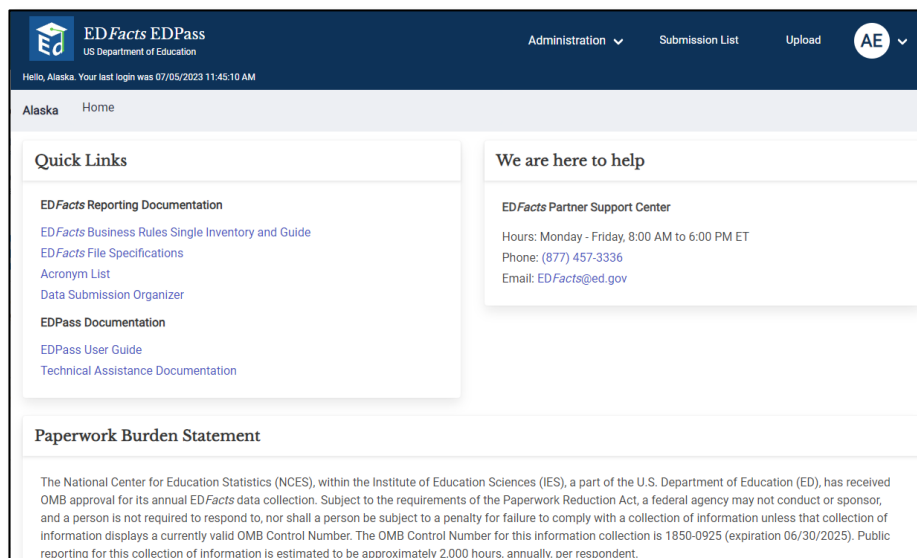


Figure 2.2: EDPass Landing Page

Note! Only SEA EDPass Managers have **Administration** in the top menu bar.

2.4 Your EDPass Account

In the upper right corner of the page header is a circle with your initials. Hover over the circle and a dropdown with options to view your user account or to log out of EDPass will appear. To review your information, select **View User Account**. If there are errors in your user information, contact your SEA EDPass Manager.

Your EDPass permissions are set by your SEA EDPass Manager. Permissions are assigned via a role defined by data areas and by functions. You will only be able to work on data areas and perform functions that your SEA EDPass Manager has granted to you. Only your SEA EDPass Manager can change your permissions.

3.0 EDPass Navigation

EDPass is designed to have a common look and feel. All pages contain the following at the top of the page (see fig. 3.1).

- **Administration** is accessible by SEA EDPass Managers and provides access to user account and role management.
- **Submission List** navigates to the Data Submission List with a list of *EDFacts* files required to be submitted for each school year and their status and to the Metadata Submission List with a list of metadata collections required to be submitted for each school year and their status.
- **Upload** navigates to the page to upload data files.
- **Date and time of last login** (left side of the header).

Below the header banner, pages may have a breadcrumb trail (grey space on fig. 3.1). These are not active links. To navigate back to the main Data Submission List or Upload pages, use the links in the blue header.

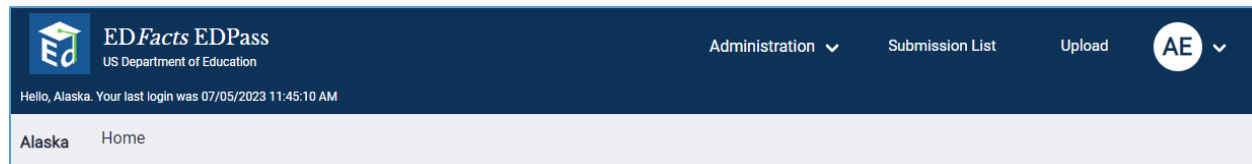


Figure 3.1: EDPass Page Header

3.1 Grids

Several pages contain grids which have common functionality.

| Feature | Functionality |
|------------|--|
| Sorting | All columns within grids are sortable using alphanumeric sort logic. Users can click to toggle between ascending and descending. The icon indicates the direction of the sort. |
| Filtering | <ul style="list-style-type: none"> • Columns within grids are filterable. Multiple columns can be filtered simultaneously. • As the user navigates between List pages and Details pages, the filter details are retained (when the user navigates to a new page or leaves the current session and opens a new session, the filter(s) are retained). • As filters are applied to the grid, chips display across the top of the grid indicating which column filters have been applied. |
| Pagination | The content of all records in the list are divided into separate pages displaying 10 (default), 25, or 50 records (rows). The number of records displayed can be changed as needed to produce fewer or more results (see fig. 3.2). |

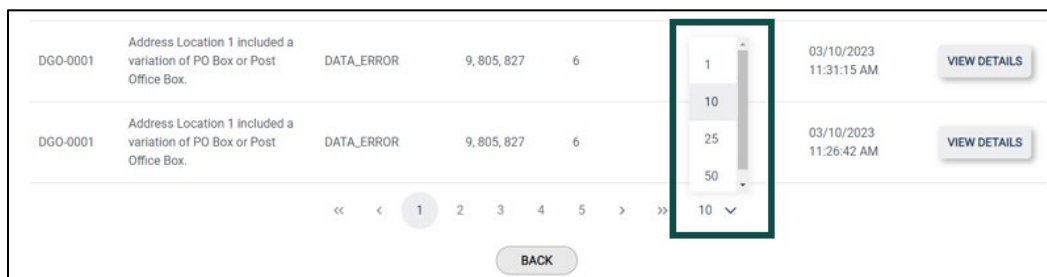


Figure 3.2: Pagination feature at the bottom of a page

3.2 Page Modes

Pages can be opened in the following modes.

| Mode | Functionality |
|------|--|
| View | When a page opens in View mode, the fields on the page are display only and cannot be edited. |
| Add | When a page opens in Add mode: <ul style="list-style-type: none"> • editable fields will be blank or have a default value • values can be entered, selected, changed, or deleted in any editable field |
| Edit | When a page opens in Edit mode: <ul style="list-style-type: none"> • editable fields display current values • values can be selected, changed, or deleted in any editable field |

3.3 Controls

Controls depend on permissions set by the SEA EDPass Manager.

| Control | Functionality |
|--------------|---|
| VIEW DETAILS | When clicked, the Details page displays in View mode. |
| EDIT | When clicked, the page displays in Edit mode. |
| SAVE | When clicked, the information entered will be saved to the database and the page will revert to View mode. |
| CANCEL | When clicked, if changes were made, a popup will display stating, "If you continue, your entries will not be saved. Click OK to continue. Click CANCEL to cancel." <ul style="list-style-type: none"> • If "OK" is clicked, the popup will close, the changes will not be saved, and the page will revert to View mode. • If "CANCEL" is clicked, the popup will close, and the information entered will remain as entered. |
| BACK | When clicked, if changes were made, a popup will display stating, "If you continue, your entries will not be saved. Click OK to continue. Click CANCEL to cancel." |

| Control | Functionality |
|---------|--|
| | <ul style="list-style-type: none"> If “OK” is clicked, the popup will close, the changes will not be saved, and the page will revert to View mode. If “CANCEL” is clicked, the popup will close, and the information entered will remain as entered. |

4.0 Uploading Data Files

The Upload page allows data files to be uploaded to EDPass. The columns of the Upload page are:

| Label of Column | Description of Column |
|-----------------------|---|
| SY | School Year |
| FS | Identifier for the file specification |
| FS Name | Name of the file specification |
| DG | IDs of data group(s) assigned to the file specification |
| File Identifier | File identifier assigned by the state |
| File Name | Name of file assigned by the SEA |
| File Level | Level of the file specification |
| Status Effective Date | Date and time the status changed for the uploaded file (Eastern Time) |
| Status | Where the file is in the upload process |

Each file uploaded will reflect a status. The statuses available are:

| Status | Explanation |
|------------------------|--|
| Processing | File is being checked by system for format and validation. |
| Format Errors | File is not in the correct file format. The file must be corrected and re-uploaded. |
| File Errors | File has validation errors. The file must be corrected and re-uploaded. |
| Upload Successful | File passed format and error validation and is uploaded to EDPass. Data quality business rules are triggered to begin running. |
| Invalid File Extension | File was uploaded in an invalid file format type (must be tab, .csv, .txt, or .zip file type). |
| File Inactive | File is not yet enabled in EDPass to be uploaded. |
| Past Due Date | Due date for file has passed; uploads not accepted for files when a due date has passed. |

EDPass accepts files in .tab, .csv, .txt and .zip formats. If a chosen file is not in the acceptable format, EDPass will not allow it to display as a selected file and will display

an error message that reads “One or more selected files has an invalid file extension. Only tab, csv, txt, and zip file formats are accepted.” (see fig. 4.1).

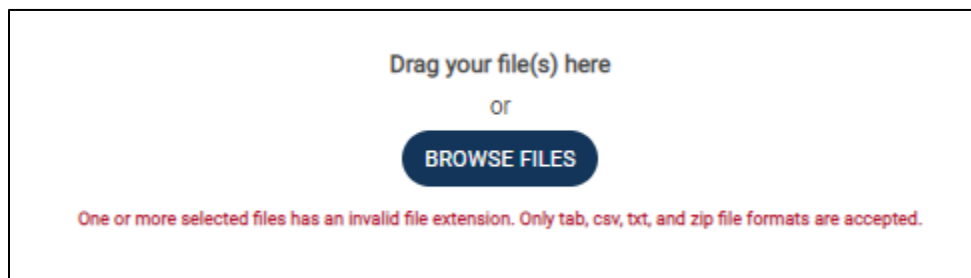


Figure 4.1: Error message when attempting to upload a file in an unacceptable layout

To upload data files, select **Upload** from the top menu bar (see fig 4.2).

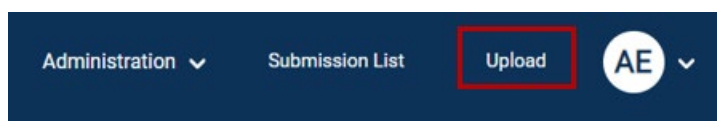


Figure 4.2: Select Upload from the top menu bar to access the upload page

To avoid format errors (file errors), SEAs can check the format of files prior to uploading to EDPass by using the file format checker tool, accessible on the [EDFacts Community of Practice](#) website.

4.1 Upload Options

- Prior to uploading a data file, select one of the upload options to proceed (see fig. 4.3): **Merge with existing file(s)**:
 - Use this option to add to data already uploaded in EDPass
 - Use this option when loading data for a single FS level using more than one file
- **Replace existing file(s)**:
 - Use this option when loading the data for a single FS level using one file
 - Use this option to completely replace data previously uploaded
 - This option deletes all the data for the FS at that level and replaces it with the data in the new file

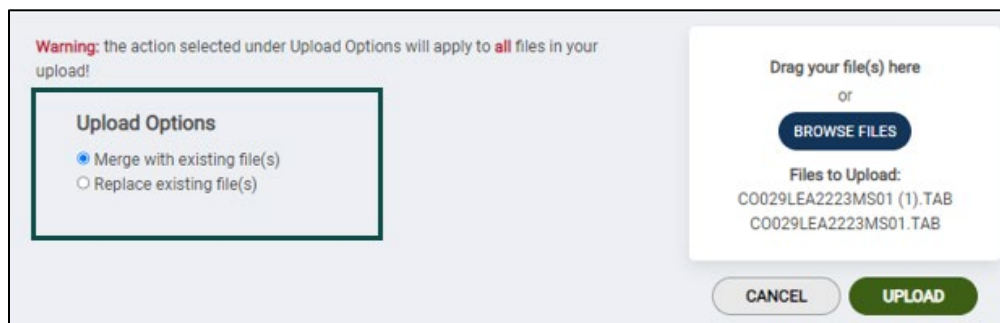


Figure 4.3: Choosing an upload option before uploading data files

Important! Do not upload a partial file using the *Replace existing file(s)* option and then plan to submit that partial file. This will only submit partial data.

There are two ways to choose a file to upload:

- **Updated! Drag your file(s) here:** Select up to three (3) files from your computer's File Explorer and drag the files to the white box (see fig. 4.4).
- **BROWSE FILES:** Clicking this button will open your computer's Documents folder. Select one or multiple files to upload.

The file names of the selected files will display on the screen after being selected (see fig. 4.4).

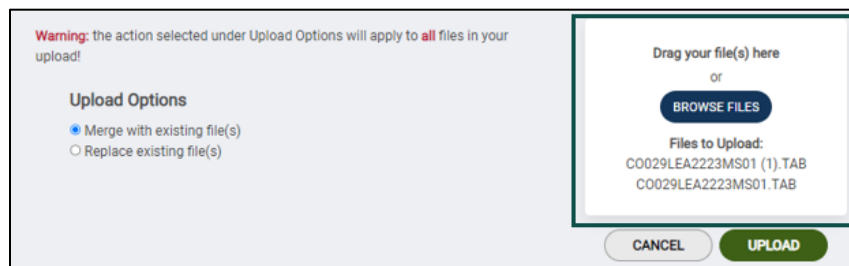


Figure 4.4: Viewing file name of chosen files to upload

Once the files to upload are selected, click the **UPLOAD** button.

To see whether a file uploaded successfully, click the internet browser's Refresh button (see fig 4.5). The page will flicker and refresh the upload page.

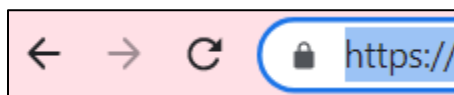


Figure 4.5: Refresh button on internet browser

4.1.1 Successful File Upload

If a file uploads successfully to EDPass, a line item will be added on the upload list (see fig. 4.6). If multiple files are uploaded at once, a line item will be added for each individual file.

The screenshot shows the 'Texas Upload > File Upload' page. A warning message states: 'Warning: the action selected under Upload Options will apply to all files in your upload!'. Below this, 'Upload Options' are listed: 'Merge with existing file(s)' (selected) and 'Replace existing file(s)'. A 'BROWSE FILES' button is present. Below the options are 'CANCEL' and 'UPLOAD' buttons. The main area displays a table of uploaded files.

| SY | FS | FS Name | DG | File Identifier | File Name | File Level | Status Effective Date | Status |
|-----------|-----|-----------|--|---------------------|----------------------------------|------------|------------------------|-------------------|
| 2022-2023 | 029 | Directory | 21, 7, 8, 4, 804, 27, 10, 743, 1, 529, 669, 11, -531, 570, 9, 531, 559, 5, 571 | TX 029 SCH DQ Rules | 6_TX_DQ_2022-23_029_SCHmerge.CSV | SCH | 03/10/2023 11:25:33 AM | Upload Successful |
| 2022-2023 | 029 | Directory | 453, 4, 669, 9, 571, 11, 570, 551, 653, 559, -16, 1, 8, 10, 16, 7 | TX 029 LEA DQ Rules | 6_TX_DQ_2022-23_029_LEAmerge.CSV | LEA | 03/10/2023 11:25:29 AM | Upload Successful |
| 2021-2022 | 029 | Directory | 21, 7, 8, 4, 804, 27, 10, 743, 1, 529, 669, 11, -531, 570, 9, 531, 559, 5, 571 | TX SCH Update | 5_TX_2021-22_029_SCHupdate.CSV | SCH | 03/10/2023 11:24:39 AM | Upload Successful |

Figure 4.6: Files that uploaded successfully to EDPass

After a file is uploaded, the file is checked for format and validation errors.

After a file passes the format and validation checks, the file will display a status of *Upload Successful* on the upload page.

- The status on the Data Submission List will reflect *Errors* (if data quality business rules are triggered) or *Ready to Submit* (if the file does not trigger any data quality business rules).

4.1.2 Unsuccessful File Upload

If a file does not upload successfully (example: wrong file format), a line item will not be added to the upload list and the data are not uploaded to EDPass. The file will need to be updated and re-uploaded.

- The status of **Format errors** is assigned if a file is not in the correct .tab, .csv, .txt, or .zip format (see fig. 4.7). A format error is issued when there is a fundamental problem with the transmittal and the software is unable to process the uploaded file any further.
 - For example, format errors will occur if a delimited file does not have the correct number of delimiters, or an incorrect file extension is used in the file name.

| | | | | | | | | | |
|-----------|-----|-----------|--|---------------------|-----------------------------------|-----|------------------------|---------------|--|
| 2022-2023 | 029 | Directory | 669, 804, 4, -531, 570, 8, 531, 571, 1, 7, 9, 11, 5, 743, 559, 10, 529, 21, 27 | TX 029 SCH DQ Rules | 3_TX_DQ_2022-23_029_SCHupdate.CSV | SCH | 03/12/2023 07:56:43 PM | Format Errors | |
|-----------|-----|-----------|--|---------------------|-----------------------------------|-----|------------------------|---------------|--|

Figure 4.7: Status of Format Errors received for uploaded file

- The status of **File Errors** will appear when a data file fails a data validation. This status is also issued when a data element value is determined to be inconsistent with other data within the referenced transmittal file. To view the File Errors Report, select **View Errors** from the kebab menu to the right (see fig. 4.8).
 - For example, an invalid permitted value will cause a validation error.
 - For example, the sum of category set A equaling 200 and the education unit total equaling 150 will cause a file error.

| | | | | | | | | | |
|-----------|-----|-----------|---|-------------------------------|----------------------|-----|------------------------|------------|---|
| 2022-2023 | 029 | Directory | 1, 11, 7, 8, 669, -16, 571, 653, 570, 4, 559, 9, 16, 10, 453, 551 | FS029 LEA - TransVAttal Ok | VA029LEA2223DLO1.TAB | LEA | 03/14/2023 09:58:18 AM | File Error | ⋮ |
|-----------|-----|-----------|---|-------------------------------|----------------------|-----|------------------------|------------|---|

Figure 4.8: Status of File Errors received for uploaded file

- **NEW!** Files that get stuck in processing will be assigned the status of **File processing error**.

| | | | | | | | | | |
|-----------|-----|--|--|-------------------------|---------------------|-----|------------------------|-----------------------|---|
| 2023-2024 | 207 | State Appropriations for Charter Schools | | FS027 SCH - TAB | MA_207_SCH_2324.tab | SCH | 02/22/2024 01:52:24 PM | File processing error | ⋮ |
| 2023-2024 | 039 | Grades Offered | | FS039 SCH - Replace TAB | MA_039_SCH_2324.tab | SCH | 02/22/2024 01:52:23 PM | File processing error | ⋮ |

Note! EDPass will not accept file uploads in the following scenarios. Additionally, files will not upload successfully in the following scenarios:

- After the due date. If an attempt is made to upload a file after the official due date, the upload status will display as *Past Due Date* and the data will not be loaded into the EDPass database.
- Before the file specification has been enabled in EDPass. If a file is uploaded prior to the file specification being enabled or ‘unlocked’ in EDPass, the upload status will display as *File Inactive*, and the data will not be loaded into the EDPass database. Once the file specification is enabled, the file must be re-uploaded.

4.2 Uploading Directory and Charter Directory Files

SEAs should upload the directory and charter directory data using the guidelines listed in this section. EDPass will not prevent these files from being uploaded out of order; however, format or data quality errors could fire when the files are uploaded out of order. If that happens, contact PSC for assistance.

1. SEA Directory is rolled over year to year – no action required by the SEA. The SEA directory for SY 2023-24 will be preloaded into EDPass.
2. LEA Directory (FS029) – With supervisory unions^[1]
 - A local education agency (LEA) record must exist before schools belong to that LEA can be uploaded.
 - An LEA record must exist before any data can be uploaded for that LEA.

^[1] SEAs with no supervisory unions and subordinate LEAs can upload its LEAs in a single LEA file.

- If a state has supervisory unions, a file transmittal with the LEAs that are supervisory unions must be uploaded *before a file transmittal with the subordinate LEAs can be uploaded.*
3. LEA Directory (FS029) – With subordinate LEAs
 4. Charter Authorizer Roster (FS190), if applicable
 - Charter Authorizers are associated with charter schools in the school directory. The charter authorizers must already exist before uploading the school directory.
 5. School Directory (FS029)
 - A school record must exist before any data can be uploaded for that school
 6. Management Organization Roster (FS196), if applicable
 - Management Organization Roster must be submitted before Crosswalk of Charter Schools to Management Organizations (FS197).

4.3 Upload Errors List

When a file receives an upload status of *File Error* or *Format Error*, access the specific business rules that failed by clicking the kebab menu on the right followed by the *File Errors* option (see fig. 4.9).



Figure 4.9: File Errors Option from Kebab Menu

The errors page will provide a summary of every failure of a business rule. Select **VIEW DETAILS** next to a particular error to view all the entities and/or specifics of the uploaded data that failed the upload (see fig. 4.10).

| Texas Upload > Upload Errors | | |
|--|---|------------------------------|
| Format errors for file 3_TX_DQ_2022-23_029_SCHupdate.CSV | | |
| Rule ID | Error Message | |
| FMTE-0026 | Effective Operational Status - School is Reopened (8), but the School Identifier (NCES) does not match a School Identifier (NCES) in the current or prior SY with Effective Operational Status - School Closed (2). | VIEW DETAILS |
| FMTE-0028 | Effective Operational Status - School was Open (1), Closed (2), Changed LEA affiliation (5), Inactive (6) or Reopened (8), but the LEA Identifier (State), School Identifier (State), LEA Identifier (NCES) and School Identifier (NCES) did not match the LEA Identifier (State), School Identifier (State), LEA Identifier (NCES) and School Identifier (NCES) in the same record of the current or prior SY directory. | VIEW DETAILS |
| FMTE-0041 | When changing the state LEA ID for a school, the State Agency Number/Prior State LEA ID/School Identifier (State) was not present in the current or prior SY directory. | VIEW DETAILS |
| FMTE-0024 | The Operational Status - School was a status other than Reopened (8), but the reported School Identifier (NCES) did not match an School Identifier (NCES) in the current or prior SY directory. | VIEW DETAILS |
| BACK | | |

Figure 4.10 Upload errors summary page.

Remember to download a copy of the uploaded data file! To download a file that was uploaded, follow steps in Section 10.0 Downloading Data in EDPass.

5.0 EDPass Submission List Page

This page lists the SEA's required EDFacts submissions separated into two lists; Data Submission List (data files) and Metadata Submission List (see fig. 5.1).

Each EDFacts submission requirement is a single row.

The default view of the Submission List is the Data Submission List.

| Alaska Data Submission List | | | | | | | | | |
|--------------------------------------|-----------|--|--|--------------------------------|-----------------|-------------------------------------|------------------------|--------------------------|--|
| Data Submission List | | Metadata Submission List | | | | | | | |
| | | | | SEA SSP REPORT | | <input type="text" value="Search"/> | | Download | |
| Due Date | SY | FS # | File Specification Name | Last Submission Date | SEA | LEA | SCH | SSP | |
| 05/10/2023 11:59:59 PM | 2022-2023 | 029 | Directory | 08/02/2023 07:50:16 AM | Errors | Errors | Errors | | |
| 05/10/2023 11:59:59 PM | 2022-2023 | 039 | Grades Offered | 08/02/2023 07:50:16 AM | Not Collected | Errors | Errors | | |
| 05/10/2023 11:59:59 PM | 2022-2023 | 190 | Charter Authorizer Directory | 08/02/2023 07:50:16 AM | Ready to Submit | Not Collected | Not Collected | | |
| 05/10/2023 11:59:59 PM | 2022-2023 | 196 | Management Organization for Charter Schools Roster | 08/02/2023 07:50:16 AM | Unknown | Not Collected | Not Collected | | |
| 05/10/2023 11:59:59 PM | 2022-2023 | 197 | Crosswalk of Charter Schools to Management Organizations | 08/02/2023 07:50:16 AM | Not Collected | Not Collected | Not Required to Submit | | |
| 05/10/2023 11:59:59 PM | 2022-2023 | 198 | Charter Contracts | 08/02/2023 07:50:16 AM | Not Collected | Not Collected | No Data in EDPass | | |

Figure 5.1 EDPass Submission List with default view of Data Submission List

5.1 Data Submission List

This page lists the SEA's required data file submissions.

The columns of the Data Submission List are:

| Label of column | Description of column |
|-----------------------------|--|
| Updated! Lock Status | Displays status of file in EDPass related to upload/submission ability |
| Due Date | Due date for the data |
| SY | School Year of data |
| FS # | Identifier for the File Specification |
| File Specification Name | Name of the File Specification |
| SEA | Status of file at the SEA level and the date and time the status was assigned |
| LEA | Status of file at the LEA level and the date and time the status was assigned |
| SCH | Status of file at the school (SCH) level and the date and time the status was assigned |
| SSP | Indicates if the SSP has been updated (most recent updated date will display) |

Note! The date and time under the SEA, LEA, and SCH columns displays when an initial action of the status changes (see fig. 5.2).

Data Submission List

Metadata Submission List

SEA SSP REPORT

Search

| Lock Status | Due Date | SY | FS # | File Specification Name | Last Submission Date | SEA | LEA | SCH | SSP |
|-------------|---------------------------|---------------|------|---|----------------------|---|---|---|-----|
| Locked | 05/10/2023 11:59:59 PM | 2022- 2023 | 029 | Directory | | Errors 08/02/2023 07:50:16 AM | Errors 08/02/2023 07:50:16 AM | Errors 08/02/2023 07:50:16 AM | |
| Locked | 02/07/2024 11:59:59 PM | 2022- 2023 | 037 | Title I Part A SWP/TAS Participation | | No Data in EDPass 08/08/2023 09:09:35 AM | No Data in EDPass 08/08/2023 09:09:35 AM | Not Collected 08/08/2023 09:09:35 AM | |
| Locked | 05/10/2023 11:59:59 PM | 2022- 2023 | 039 | Grades Offered | | Not Collected 08/02/2023 07:50:16 AM | Errors 08/02/2023 07:50:16 AM | Errors 08/02/2023 07:50:16 AM | |
| Locked | 01/24/2024 11:59:59 PM | 2022- 2023 | 045 | Immigrant | | No Data in EDPass 08/08/2023 09:09:35 AM | No Data in EDPass 08/08/2023 09:09:35 AM | Not Collected 08/08/2023 09:09:35 AM | |

Figure 5.2: Data Submission List

Note! The date and time are in the Eastern Time zone (ET).

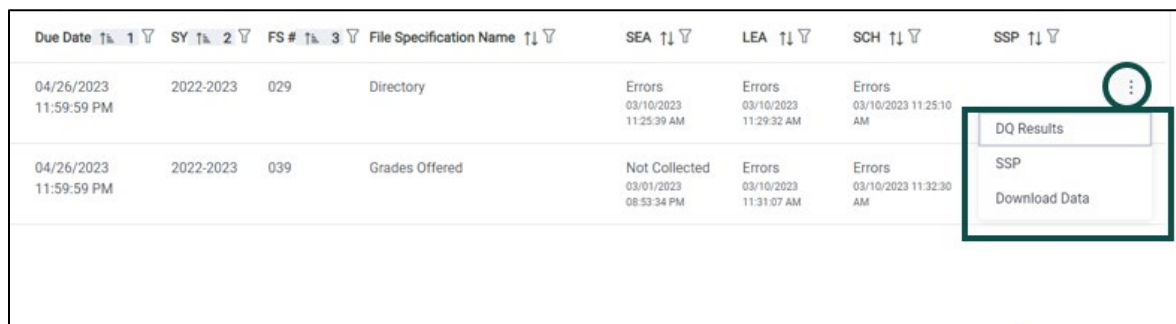
5.1.1 File Status

Each row on the Submission List page displays a status at the SEA, LEA, and SCH level. The statuses are:

| Status | Explanation |
|------------------------|---|
| Not Collected | Level not approved for collection in the Information Collection Request (ICR) |
| Not Required to Submit | Level is approved for collection; however, your SEA is not required to submit |
| No Data in EDPass | No data have been successfully uploaded |
| Errors | Uploaded data has data quality business rule failures |
| Ready to Submit | Data either has no business rule failures OR data notes have been provided for all business rule failures |
| Submitted | Data has been successfully submitted to ED |
| Data in EDPass | This status may display for a short period of time for larger files as they process. If this status remains on the screen for a longer period of time, please contact PSC for assistance. |

5.1.2 Data Submission List Kebab Menu

Each row on the Data Submission List page has a kebab menu. The kebab menu will only have options when data area and functionality has been granted by your SEA EDPass Manager. To open a kebab menu, click on the three dots to the right of the row (see fig 5.3).



| Due Date | SY | FS # | File Specification Name | SEA | LEA | SCH | SSP |
|---------------------------|-----------|------|-------------------------|--|-------------------------------------|----------------------------------|-----|
| 04/26/2023 11:59:59 PM | 2022-2023 | 029 | Directory | Errors 03/10/2023 11:25:39 AM | Errors 03/10/2023 11:29:32 AM | Errors 03/10/2023 11:25:10 AM | |
| 04/26/2023 11:59:59 PM | 2022-2023 | 039 | Grades Offered | Not Collected 03/01/2023 08:53:34 PM | Errors 03/10/2023 11:31:07 AM | Errors 03/10/2023 11:32:30 AM | |

Figure 5.3: Kebab Menu for FS029 expanded

Note! If the kebab menu is blank, access to that data area has not been granted. If the kebab menu does not have a certain option available, access to that function has not been granted (e.g., if you are not authorized to submit, the kebab will not show the Submit Data option). Contact your SEA EDPass Manager for assistance.

If the kebab menu does appear, the options are:

| Option | What does it do |
|-------------|--|
| DQ Results | Opens the Data Quality Results page for that data file – See Section 6.0 |
| SSP | Opens the SSP for that data submission – See Section 9.0 |
| Submit Data | Opens the Submit page – See Section 8.0 |

| Option | What does it do |
|---------------|---|
| Download Data | Opens the Download Data popup to request a download of data for that data submission – See Section 10.0 |

5.2 Metadata Submission List

This page lists the SEA’s required metadata submissions.

The columns of the Metadata Submission List are:

| Label of column | Description of column |
|-----------------------------|--|
| Updated! Lock Status | Displays status of metadata in EDPass related to data entry/submission ability |
| Due Date | Due date for the metadata |
| SY | School year of data |
| FS # | Identifier for the Metadata collection |
| Metadata Collection Name | Name of the Metadata Collection |
| Last Submission date | Displays most recent submission date |
| SEA | Status of metadata collection at the SEA level including the date and time the status was assigned |

Data Submission List

Metadata Submission List

CLEAR FILTERS

School Year: Equals 2023-2024

Search

Download

| Lock Status | Due Date | SY | FS # | Metadata Collection Name | Last Submission Date | SEA |
|-------------|------------------------|-----------|------|-----------------------------------|----------------------|---|
| Unlocked | 07/31/2024 11:59:59 PM | 2023-2024 | 5024 | CCD Membership Metadata | | No Data in EDPass 02/09/2024 11:47:41 AM |
| Unlocked | 07/31/2024 11:59:59 PM | 2023-2024 | 5018 | CCD Staffing Metadata | | No Data in EDPass 02/09/2024 11:47:41 AM |
| Unlocked | 05/08/2024 11:59:59 PM | 2023-2024 | 5017 | CCD Grades Offered Metadata | | No Data in EDPass 02/09/2024 11:47:41 AM |
| Unlocked | 02/19/2025 11:59:59 PM | 2023-2024 | 5016 | CCD Graduates/Completers Metadata | | No Data in EDPass 02/09/2024 11:47:41 AM |

Enter/Edit Metadata

Figure 5.4: Metadata Submission List

5.2.1 Metadata Collection Status

Each row on the Metadata Submission List page displays a status at the SEA level. The statuses are:

| Status | Explanation |
|------------------------|--|
| Not Required to Submit | SEA is not required to submit |
| No Data in EDPass | No data have been successfully uploaded |
| Errors | Uploaded data have data quality business rule failures |
| Ready to Submit | Data either have no business rule failures OR data notes have been provided for all business rule failures |
| Submitted | Data have been successfully submitted to ED |

5.2.2 Metadata Submission List Kebab Menu

Each row on the Metadata Submission List page has a kebab menu. The kebab menu will only have options when data area and functionality have been granted by your SEA EDPass Manager. To open a kebab menu, click on the three dots to the right of the row (see fig 5.5).

The screenshot shows the 'Metadata Submission List' tab selected. At the top right, there is a search bar and a download icon. Below the header, there are several columns: 'Due Date', 'SY', 'FS #', 'Metadata Collection Name', 'Last Submission Date', and 'SEA'. The row for 'Assessment metadata - General' (FS # 5005) is highlighted. The kebab menu for this row is expanded, showing three options: 'Data in EDPass' (with a timestamp), 'Enter/Edit Metadata', and 'Download Metadata'. The other rows show 'No Data in EDPass'.

| Due Date | SY | FS # | Metadata Collection Name | Last Submission Date | SEA |
|------------------------|-----------|------|-------------------------------|----------------------|---|
| 01/10/2024 11:59:59 PM | 2022-2023 | 5005 | Assessment metadata - General | | Data in EDPass 09/29/2023 10:31:57 AM |
| 01/10/2024 11:59:59 PM | 2022-2023 | 5006 | Assessment metadata - Math | | No Data in EDPass 08/15/2023 02:36:15 PM |
| 01/10/2024 11:59:59 PM | 2022-2023 | 5007 | Assessment metadata - RLA | | No Data in EDPass 08/15/2023 02:36:15 PM |

Figure 5.5: Kebab Menu for 5005 expanded

Note! If the kebab menu is blank, access to that data area has not been granted. If the kebab menu does not have *Enter/Edit Metadata* available, that function has not been granted (e.g., if you are not authorized to enter or edit metadata, the kebab will not show this option). Contact your SEA EDPass Manager for assistance.

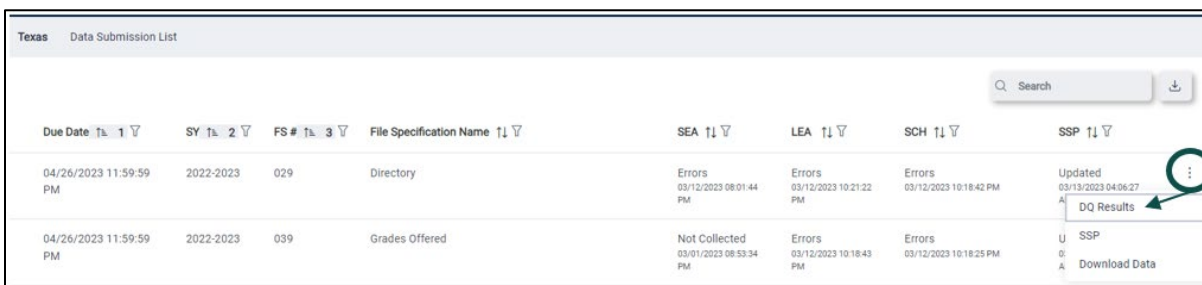
If the kebab menu does appear, the options are:

| Option | What does it do |
|---------------------|---|
| Enter/Edit Metadata | Opens the metadata collection entry form |
| Submit Data | Opens the Submit page |
| Download Metadata | Opens the Download Data popup to request a download of data for that metadata collection – See Section 10.0 |

6.0 Data Quality Results

Once a file receives the *Upload Successful* status on the upload page, EDPass processes the data quality business rules for that data. To see if a file failed any data quality business rules, navigate to the Data Submission List page.

- If the status *Errors* displays, select **DQ Results** from the kebab menu (see fig. 6.1)
- If the *Ready to Submit* status displays, the file did not fail any data quality business rules (see [Section 8.0](#) for guidance on submitting data in EDPass).



| Due Date | SY | FS # | File Specification Name | SEA | LEA | SCH | SSP |
|------------------------|-----------|------|-------------------------|---|----------------------------------|----------------------------------|---|
| 04/26/2023 11:59:59 PM | 2022-2023 | 029 | Directory | Errors 03/12/2023 08:01:44 PM | Errors 03/12/2023 10:21:22 PM | Errors 03/12/2023 10:18:42 PM | Updated 03/13/2023 04:06:27 ⋮ DQ Results |
| 04/26/2023 11:59:59 PM | 2022-2023 | 039 | Grades Offered | Not Collected 03/01/2023 08:53:34 PM | Errors 03/12/2023 10:18:43 PM | Errors 03/12/2023 10:18:25 PM | U SSP 0: A Download Data |

Figure 6.1: Accessing the DQ Results from the Data Submission List

6.1 Business Rule Processing in EDPass

When business rules involve more than one data file, the data in two or more files are compared against each other. If a file is already in the *Submitted* status and a corresponding file(s) is uploaded to EDPass, the file in *Submitted* status will revert to a status of either *Errors* (if data quality errors exist) or back to *Ready to Submit*. The business rule(s) that involved both files is re-run upon the upload of the second file and will have to be re-submitted in EDPass.

Example: A state has submitted FS002 data in EDPass but has not yet submitted FS052. The state identifies a data error in the school level FS052 file, resulting in uploading an updated data file. Upon upload, the business rules, including IDEA-0008 which cross-references school level FS002 and FS052, are re-run resulting in the school level of FS002 reverting from *Submitted* to *Ready to Submit* (due to no DQ errors existing upon being re-run).

Note! Working towards all files reflecting the *Ready to Submit* status is more important than submitting files, one at a time, as they are finalized.

6.2 Data Quality Results List

A summary report listing the business rules that failed, including a count of unresolved and resolved business rule failures, is initially displayed.

The columns of the Data Quality Results List are:

| Label of column | Description of column |
|------------------------|--|
| Rule ID | Identifier for the business rule. Use this ID to find more information about the business rule in the BRSI |
| Error message | Explanation of why the data failed the business rule |
| Failure Classification | Data Error (can only be resolved by uploading a corrected file) Rule Failure (can be resolved either by uploading a corrected file or by adding a data note that explains why the business rule failed) |
| Data Group | ID of data group that failed the business rule |
| Unresolved | Count of errors and any rule failures without a data note |
| Resolved | Count of rule failures with a data note |
| Rule Run Date/Time | Date and time the business rule failure was determined |

6.2.1 Rule Failure Classification

Important! The *Failure Classification* column on the Data Quality Results List is important because it displays whether or not an error can be resolved with a data note.

- The classification *Rule Failure* indicates that the data failed a business rule that can be resolved either by uploading a corrected file or by adding a data note explaining why the business rule failed.
- The classification *Data Error* indicates that the data failed a business rule, and the error can only be resolved by uploading a corrected data file (a data note cannot resolve these types of errors).

6.2.2 Downloading Reports of the Data Quality Results

There are two types of reports on the Data Quality Results List:

- (1) Download icon – Summary of the data quality results (what is displayed on the Data Quality Results List page)
- (2) **RUN REPORT** button – The report will include up to 500 instances *per* business rule failure (what is displayed when **VIEW DETAILS** is selected from the Data Quality Results Details)

Important! If there are collectively more than 500 business rules triggering, reach out to PSC to request a full extract.

To download the summary of DQ errors triggering for a particular file specification (i.e., the Data Quality Results List as displayed on the screen) into Excel format, select the download icon on the top right of the screen (see fig. 6.2).

Note! If there is more than one page of data quality results, use the pagination option at the bottom of the page to display more rows on the screen. This summary will only return DQ errors as displayed on the screen.



NY 2022-2023 F5009 (Directory) Exec On: 06/20/2023 11:28:39 PM

Q Search [Download Icon] **RUN REPORT**

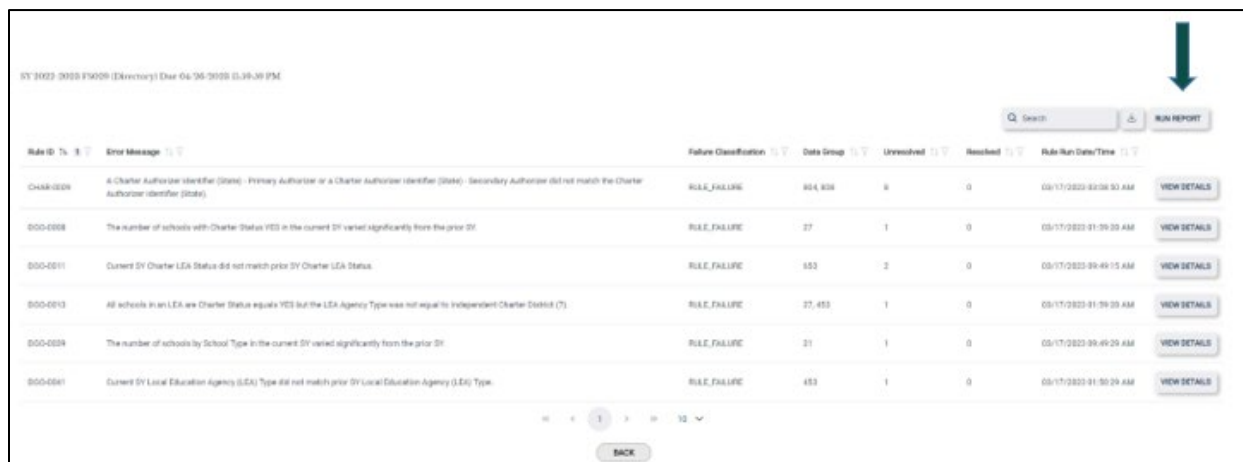
| Rule ID | Error Message | Failure Classification | Data Group | Unresolved | Resolved | Rule Run Date/Time | VIEW DETAILS |
|-----------|---|------------------------|------------|------------|----------|------------------------|--------------|
| CHAR-0009 | A Charter Authorizer Identifier (State) - Primary Authorizer or a Charter Authorizer Identifier (State) - Secondary Authorizer did not match the Charter Authorizer Identifier (State). | RULE_FAILURE | 804,408 | 8 | 0 | 05/17/2023 09:08:50 AM | VIEW DETAILS |
| DOD-0008 | The number of schools with Charter Status YES in the current SY varied significantly from the prior SY. | RULE_FAILURE | 27 | 1 | 0 | 05/17/2023 01:59:25 AM | VIEW DETAILS |
| DOD-0011 | Current SY Charter LEA Status did not match prior SY Charter LEA Status. | RULE_FAILURE | 653 | 2 | 0 | 05/17/2023 06:49:15 AM | VIEW DETAILS |
| DOD-0013 | All schools in an LEA are Charter Status equals YES but the LEA Agency Type was not equal to Independent Charter District (7). | RULE_FAILURE | 27,453 | 1 | 0 | 05/17/2023 01:59:25 AM | VIEW DETAILS |
| DOD-0029 | The number of schools by School Type in the current SY varied significantly from the prior SY. | RULE_FAILURE | 21 | 1 | 0 | 05/17/2023 06:49:29 AM | VIEW DETAILS |
| DOD-0041 | Current SY Local Education Agency (LEA) Type did not match prior SY Local Education Agency (LEA) Type. | RULE_FAILURE | 453 | 1 | 0 | 05/17/2023 01:59:29 AM | VIEW DETAILS |

10 1 10

BACK

Figure 6.2: Download an extract of the Data Quality Results page

To download a detailed DQ report that includes the data quality errors triggered for that file specification and all data notes applied, select **RUN REPORT** (see fig 6.3).



NY 2022-2023 F5009 (Directory) Exec On: 06/20/2023 11:28:39 PM

Q Search [Download Icon] **RUN REPORT**

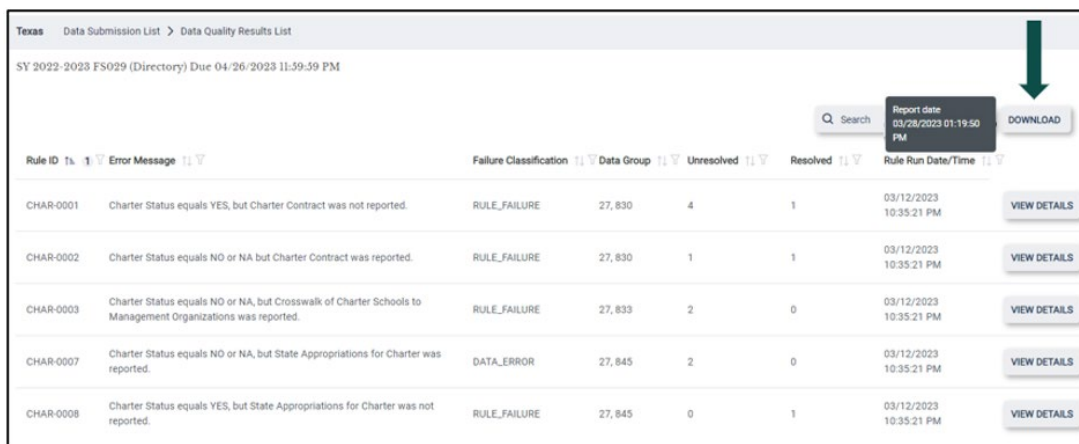
| Rule ID | Error Message | Failure Classification | Data Group | Unresolved | Resolved | Rule Run Date/Time | VIEW DETAILS |
|-----------|---|------------------------|------------|------------|----------|------------------------|--------------|
| CHAR-0009 | A Charter Authorizer Identifier (State) - Primary Authorizer or a Charter Authorizer Identifier (State) - Secondary Authorizer did not match the Charter Authorizer Identifier (State). | RULE_FAILURE | 804,408 | 8 | 0 | 05/17/2023 09:08:50 AM | VIEW DETAILS |
| DOD-0008 | The number of schools with Charter Status YES in the current SY varied significantly from the prior SY. | RULE_FAILURE | 27 | 1 | 0 | 05/17/2023 01:59:25 AM | VIEW DETAILS |
| DOD-0011 | Current SY Charter LEA Status did not match prior SY Charter LEA Status. | RULE_FAILURE | 653 | 2 | 0 | 05/17/2023 06:49:15 AM | VIEW DETAILS |
| DOD-0013 | All schools in an LEA are Charter Status equals YES but the LEA Agency Type was not equal to Independent Charter District (7). | RULE_FAILURE | 27,453 | 1 | 0 | 05/17/2023 01:59:25 AM | VIEW DETAILS |
| DOD-0029 | The number of schools by School Type in the current SY varied significantly from the prior SY. | RULE_FAILURE | 21 | 1 | 0 | 05/17/2023 06:49:29 AM | VIEW DETAILS |
| DOD-0041 | Current SY Local Education Agency (LEA) Type did not match prior SY Local Education Agency (LEA) Type. | RULE_FAILURE | 453 | 1 | 0 | 05/17/2023 01:59:29 AM | VIEW DETAILS |

10 1 10

BACK

Figure 6.3: Select RUN REPORT to download a report of the DQ errors

Note! After initiating the report once, the button will display as **DOWNLOAD** thereafter (see fig 6.4). When hovering over the **DOWNLOAD** button, the last report run date and time will appear. This will refresh each time the report is generated.



Texas Data Submission List > Data Quality Results List

SY 2022-2023 FS029 (Directory) Due 04/26/2023 11:59:59 PM

Search Report date 03/28/2023 01:19:50 PM DOWNLOAD

| Rule ID | Error Message | Failure Classification | Data Group | Unresolved | Resolved | Rule Run Date/Time | |
|-----------|--|------------------------|------------|------------|----------|------------------------|--------------|
| CHAR-0001 | Charter Status equals YES, but Charter Contract was not reported. | RULE_FAILURE | 27, 830 | 4 | 1 | 03/12/2023 10:35:21 PM | VIEW DETAILS |
| CHAR-0002 | Charter Status equals NO or NA but Charter Contract was reported. | RULE_FAILURE | 27, 830 | 1 | 1 | 03/12/2023 10:35:21 PM | VIEW DETAILS |
| CHAR-0003 | Charter Status equals NO or NA, but Crosswalk of Charter Schools to Management Organizations was reported. | RULE_FAILURE | 27, 833 | 2 | 0 | 03/12/2023 10:35:21 PM | VIEW DETAILS |
| CHAR-0007 | Charter Status equals NO or NA, but State Appropriations for Charter was reported. | DATA_ERROR | 27, 845 | 2 | 0 | 03/12/2023 10:35:21 PM | VIEW DETAILS |
| CHAR-0008 | Charter Status equals YES, but State Appropriations for Charter was not reported. | RULE_FAILURE | 27, 845 | 0 | 1 | 03/12/2023 10:35:21 PM | VIEW DETAILS |

Figure 6.4: Select **DOWNLOAD** to generate a report of the DQ errors and timestamp of last report run.

Reminder! The detailed report will include *up to 500* DQ errors per rule instances. If a rule instance has more than 500 DQ errors, email PSC to request a full DQ error report.

To generate an updated report, select **DOWNLOAD** and a pop-up will appear with multiple options (see fig 6.5):

- Click **DOWNLOAD** to down the *existing* report that was previously run
- Click **RERUN** to run the report again which will replace the previous one
 - o Rerun this report when data notes are added
- Click **CANCEL** to return to the Data Quality Results page and cancel the report action

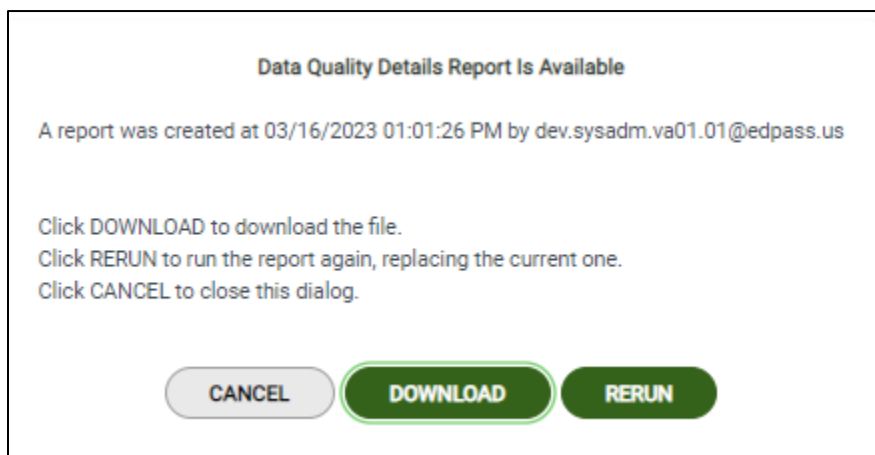


Figure 6.5: Data Quality Report pop-up with options

6.3 Data Quality Results Details Page

Selecting **VIEW DETAILS** from the Data Quality Results List page opens the Data Quality Results Details page for a specific error message (see fig. 6.6).

Listed on this page is each failed instance of the business rule. If the failure classification for the error is *Rule Failure*, data notes can be added, edited, or deleted to explain the error. If the failure classification is *Data Error*, the error can only be resolved by uploading a corrected file.

The columns of the Data Quality Results Details page are:

| Label of column | Description of column |
|---------------------|---|
| Level | File specification level of the data that failed |
| State Agency Number | Displays as 01 for all SEAs |
| LEA ID (State) | State-assigned LEA identifier |
| LEA Name | LEA name |
| School ID (State) | State-assigned school identifier |
| School Name | School name |
| Condition | Indicates specific data elements that failed the business rule |
| Data Note ID | After data notes added, unique identifier assigned to data note by system |

Download the data quality errors on each page by selecting the download icon on the top right. Use the pagination option at the bottom of the screen to display more instances of errors. This option only downloads the information displayed on the screen (see fig 6.6).

| Level | State Agency Number | LEA ID (State) | LEA Name | School ID (State) | School Name | Condition | Data Note ID |
|-------|---------------------|----------------|-------------|-------------------|---------------|---|--------------|
| sch | 01 | TX0003 | TX LEA 0003 | TXSCH01203 | TXSCH01203 | Charter status: YES, Charter contract ID number: None | |
| sch | 01 | TX0004 | TX LEA 0004 | TXSCH00004 | CHARTER 00004 | Charter status: YES, Charter contract ID number: None | |
| sch | 01 | TX0005 | TX LEA 0005 | TXSCH01205 | TXSCH01205 | Charter status: YES, Charter contract ID number: None | |
| sch | 01 | TX0036 | TX LEA 0036 | TXSCH00036 | TXSCH00036 | Charter status: YES, Charter contract ID number: None | |
| sch | 01 | TX0039 | TX LEA 0039 | TXSCH00039 | TXSCH00039 | Charter status: YES, Charter contract ID number: None | |

Figure 6.6 Data Quality Results Details page

- If the data are accurate as reported, see [Section 7.0 Data Notes](#) for steps on adding data notes.
- If the data reported are inaccurate, update the entire data file or record for that particular entity and re-upload the file to resolve the data quality error(s).

6.3.1 Insufficient Data vs. No Value

When a rule is triggered that includes two file specifications, but one has not been successfully uploaded to EDPass yet, the system will return a value of *Insufficient Data*

in the error message (see fig 6.7). This value will display in the *Condition* column. This is because there is no data in the system. To resolve these issues, upload the other data file used in the business rule. To identify the second file specification included in the rule, review the BRSI.

| | | | | | | |
|-----|----|-----|------------|-------|-------|--|
| sch | 01 | MD1 | MD_00620MD | SCH12 | SCH12 | Updated operational status - school 1, Grades offered: INSUFFICIENT_DATA |
|-----|----|-----|------------|-------|-------|--|

Figure 6.7. INSUFFICIENT_DATA in the error message

In the event that a rule requiring two file specifications is triggered and both have been uploaded, but one or more of the fields in the files does not have data reported for an entity, that omitted entity will show a blank instead of *Insufficient Data*.

7.0 Data Notes

This section provides instructions on adding a new data note, editing existing data notes, or deleting data notes.

Data notes can resolve instances of DQ errors with the classification of *Rule Failure*. Data notes do not resolve DQ errors with the classification of *Data Error*.

7.1 Adding a New Data Note

This section explains how to apply one or multiple data notes to instances of *Rule Failures* in EDPass.

Once on the Data Quality Results Details page, select **ADD DATA NOTE** (see fig. 7.1).

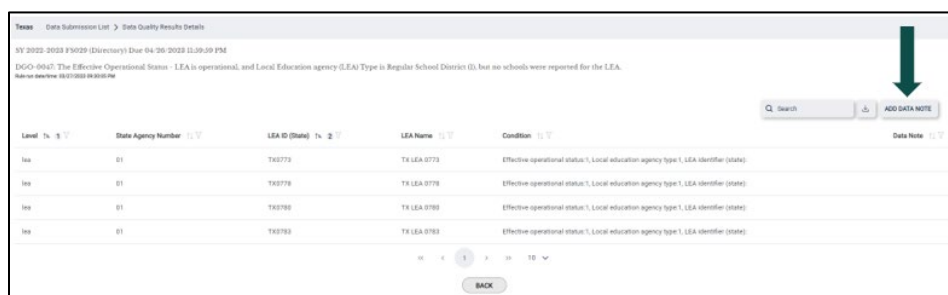


Figure 7.1: Select ADD DATA NOTE to enter the data note screen

The page will enter *Edit* mode allowing the ability to select a single instance or multiple instances of a *Rule Failure* to associate with a data note.

Select the check box(es) in front of the instance of the *Rule Failure*, enter the data note in the text box, and select **SAVE** at the bottom of the page (see fig. 7.2).

The screenshot shows a table with columns: Level, State Agency Number, LEA ID (State), LEA Name, and Condition. Below the table is a 'Data Note' section with a text area labeled 'Enter data note here.' and buttons for 'EDIT', 'DELETE', 'BACK', 'CANCEL', and 'SAVE'. A green arrow points to the 'SAVE' button.

Figure 7.2: Type data note in the Data Note box and select SAVE

The screen will revert to view mode and the comment area will no longer be editable. This will confirm that the data note entered has been correctly applied to DQ rule failure instance(s).

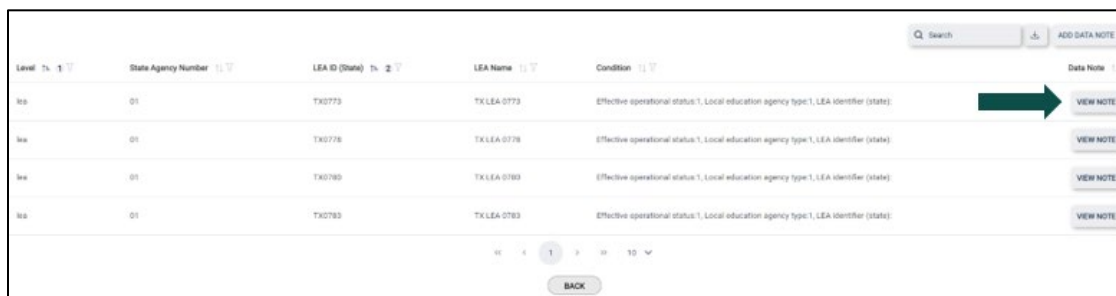
To make changes to that specific data note, select **EDIT**, make the changes, and select **SAVE** to capture updates (see fig. 7.3).

The screenshot shows the same table and 'Data Note' section as Figure 7.2. A green arrow points to the 'EDIT' button. The 'Data Note' text area now contains a placeholder text: 'Enter data note here.' and a 'BACK' button is visible at the bottom.

Figure 7.3: Select EDIT to make changes to a saved data note

Select **BACK** to return to the list of *Rule Failures*. A check mark will now appear next to the DQ rule failure instance with which the data note is associated.

After a *Rule Failure* instance has been associated with a data note, a new button will appear on the Data Quality Results Details page, **VIEW NOTE** (see fig. 7.4).



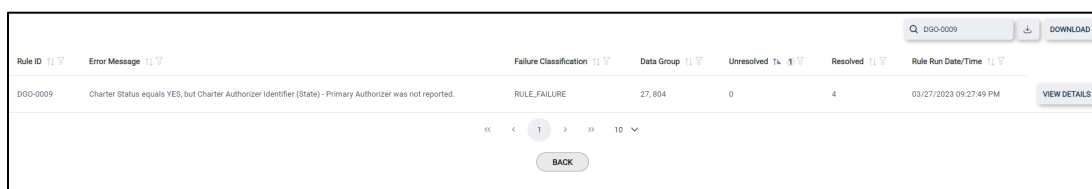
| Level | State Agency Number | LEA ID (State) | LEA Name | Condition | Data Note |
|-------|---------------------|----------------|-------------|---|------------------|
| HS | 01 | TX0773 | TX LEA 0773 | Effective operational status 1, Local education agency type 1, LEA identifier (state) | VIEW NOTE |
| HS | 01 | TX0778 | TX LEA 0778 | Effective operational status 1, Local education agency type 1, LEA identifier (state) | VIEW NOTE |
| HS | 01 | TX0780 | TX LEA 0780 | Effective operational status 1, Local education agency type 1, LEA identifier (state) | VIEW NOTE |
| HS | 01 | TX0783 | TX LEA 0783 | Effective operational status 1, Local education agency type 1, LEA identifier (state) | VIEW NOTE |

Figure 7.4: The **VIEW NOTE** button will appear when a data note is applied to an instance of an error

Select **VIEW NOTE** to view the data note associated with that *Rule Failure* instance.

Important! The data note displayed is only for the associated rule failures.

Returning to the Data Quality Results List, the number of *Resolved* errors now displays “4” (since 4 errors were resolved in this particular example) (see fig.7.5).



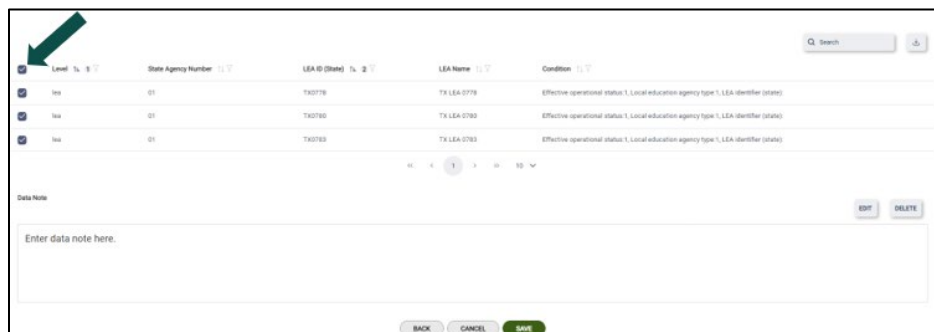
| Rule ID | Error Message | Failure Classification | Data Group | Unresolved | Resolved | Rule Run Date/Time |
|----------|---|------------------------|------------|------------|----------|------------------------|
| 000-0009 | Charter Status equals YES, but Charter Authorizer Identifier (State) - Primary Authorizer was not reported. | RULE_FAILURE | 27,804 | 0 | 4 | 03/27/2023 09:27:49 PM |

Figure 7.5: List of *Resolved* errors displays 4 while *Unresolved* displays 0

7.2 Associating a Data Note to Multiple Rule Failures

To associate a data note to multiple instances of a *Rule Failure*, select the checkbox next to each instance of a *Rule Failure* (see fig. 6.6).

To associate one data note with *all instances* of a *Rule Failure*, select the first checkbox or the “select all” checkbox (see fig. 7.6). This will *select all* instances of the *Rule Failure*, on every page. Example: if there are 100 instances of a *Rule Failure*, 50 on each page, selecting the “select all” checkbox will apply the data note to all 100 instances.



| Level | State Agency Number | LEA ID (State) | LEA Name | Condition | |
|-------------------------------------|---------------------|----------------|----------|-------------|---|
| <input checked="" type="checkbox"/> | HS | 01 | TX0778 | TX LEA 0778 | Effective operational status 1, Local education agency type 1, LEA identifier (state) |
| <input checked="" type="checkbox"/> | HS | 01 | TX0780 | TX LEA 0780 | Effective operational status 1, Local education agency type 1, LEA identifier (state) |
| <input checked="" type="checkbox"/> | HS | 01 | TX0783 | TX LEA 0783 | Effective operational status 1, Local education agency type 1, LEA identifier (state) |

Data Note

Enter data note here.

EDIT **DELETE**

BACK **CANCEL** **SAVE**

Figure 7.6: Select the check boxes next to multiple *Rule Failures* to associate the same data note to all

Select **SAVE**, followed by **BACK**, to return to the list of *Rule Failures*.

Once a data note is applied to a *Rule Failure*, it can be edited by selecting **VIEW NOTE**, then selecting **EDIT**. Make changes; select **SAVE**.

7.3 Downloading Data Notes

After data notes are saved, a report can be downloaded that includes all data notes by selecting the **RUN REPORT** button from the Data Quality Results List (see fig. 7.7). Follow the browser's prompts to download the report in .CSV or Excel format.

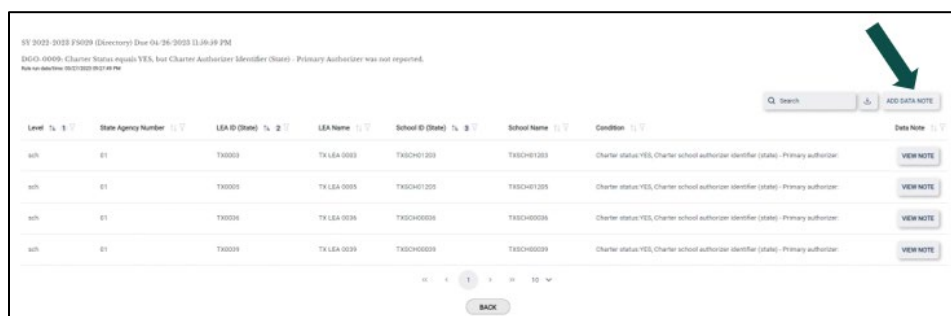


Figure 7.7: Select the download icon to download the Rule Failures and associated data notes

7.4 Deleting a Data Note

In order to delete a data note, select **VIEW NOTE** from the Data Quality Results Details page and select **DELETE** to remove the associated data note (see fig. 7.8).

Note! Deleting the data note will remove it from all associated instances. The instances will revert to *Unresolved* on the Data Quality Results List page. Follow the steps in [Section 7.1](#) to apply a new data note.

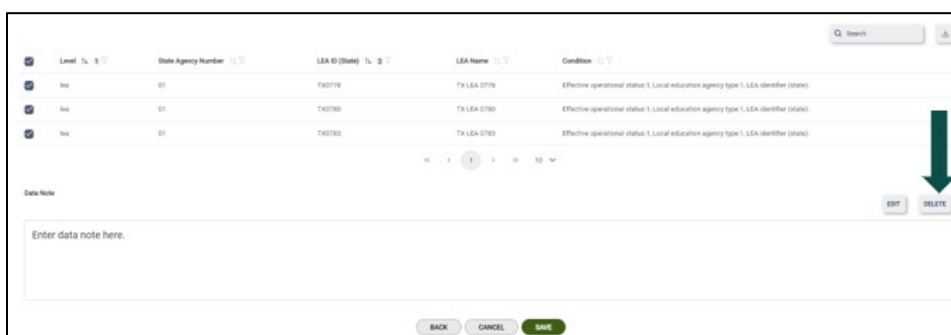


Figure 7.8: Select DELETE to remove a data note applied to a Rule Failure

8.0 Submit

Data are submitted as a package in EDPass. In order to submit data to the Department in EDPass, all required levels of data must be in the *Ready to Submit* status.

If data are part of a *data package*, all required levels of all data included in the data package must display a status of *Ready to Submit* in order to submit. For information on data packages, review the *EDPass Data Packages* section of the [SY 2023-24 EDFacts Workbook and FAQs](#).

The following must be completed in order for each level of data to be assigned the *Ready to Submit* status on the Data Submission List:

- All data errors have been resolved
- All rule failures have an associated data note

Once all required levels of a data file or metadata collection reflect the *Ready to Submit* status, select **Submit** from the kebab menu (see fig. 8.1).

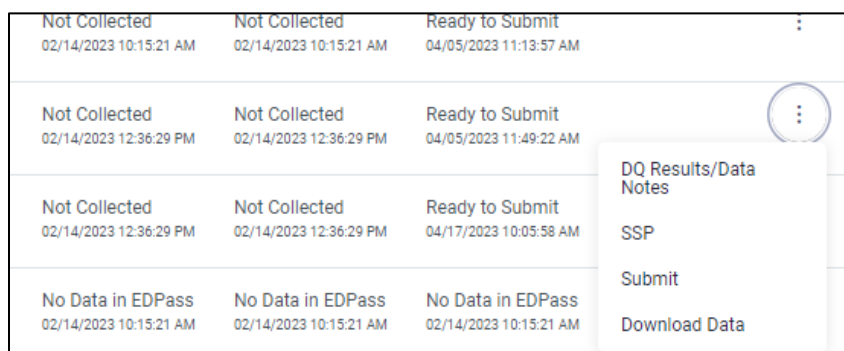


Figure 8.1: Selecting **Submit** from the kebab menu for a file specification

The *Submit Data* pop-up will appear (see fig. 8.2).

Submit Data

I am submitting this data on behalf of the State Education Agency to the US Department of Education (ED) where the ED will have access to the data. The submission of this data is in response to reporting requirements in the Information Collection Request (ICR) for EDFacts (OMB 1850-0925).

| FS | FS Name | Due Date | SEA | LEA | SCH |
|-----|----------------|------------------------|---|---|---|
| 039 | Grades Offered | 05/03/2023 11:59:59 PM | Not Collected 04/26/2023 10:30:17 AM | Ready to Submit 04/26/2023 10:30:17 AM | Ready to Submit 04/26/2023 10:30:17 AM |

1 of 1 << < 1 > >> 20 ▾

Figure 8.2: Submit Data Confirmation pop-up

Upon selecting **Submit**, a *Confirm Submission* pop-up will appear (see fig. 8.3).

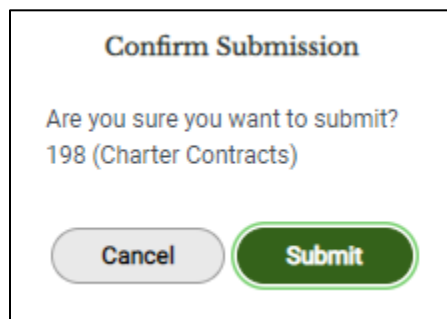


Figure 8.3: Selecting Submit from *Confirm Submission* pop-up

Select **Submit** to submit the file specification data and data notes.

The status of each required level will change to *Data Submission in Progress* (see fig. 8.4).

| | | |
|---|---|--|
| Not Collected 02/14/2023 12:36:29 PM | Not Collected 02/14/2023 12:36:29 PM | Data Submission In Progress 04/19/2023 04:20:10 PM |
|---|---|--|

Figure 8.4: Status of *Data Submission in Progress* on Data Submission List

IMPORTANT! Upon submitting, the status of the data will be *Data Submission in Progress*. The processing time of data can take anywhere from 45 to 60 minutes. Shortening the processing time of data will continue to be a priority.

Once data is successfully processed, the *Submitted* status will display (see fig. 8.5).

| SEA ↑↓ ∇ | LEA ↑↓ ∇ | SCH ↑↓ ∇ | SSP ↑↓ ∇ |
|---|-------------------------------------|-------------------------------------|-----------------------------------|
| Not Collected 06/03/2023 03:39:09 PM | Submitted 06/23/2023 01:16:18 PM | Submitted 06/23/2023 01:16:18 PM | Updated 04/28/2023 09:27:42 PM |

Figure 8.5: Status of Submitted reflected upon successful submission

After a due date, all data (as applicable) are delivered to ED.

8.1 Submitting Data Packages

The following file specifications must be submitted as a package for SEAs that have Charter schools and are required to submit Charter data. All required levels of both file specifications must be in the *Ready to Submit* status in order to proceed with submission (see fig. 8.6):

- FS029 (Multiple DGs) — Directory and FS190 (Multiple DGs) — Charter Authorizer Directory
- FS196 (Multiple DGs) — Management Organization for Charter Schools Roster and FS197 (DG833) — Crosswalk of Charter Schools to Management Organizations

Submit Data

I am submitting this data on behalf of the State Education Agency to the US Department of Education (ED) where the ED will have access to the data. The submission of this data is in response to reporting requirements in the Information Collection Request (ICR) for ED Facts (OMB 1850-0925).

| FS | FS Name | Due Date | SEA | LEA | SCH |
|-----|--|------------------------|--|--|--|
| 196 | Management Organization for Charter Schools Roster | 04/26/2023 11:59:59 PM | Ready to Submit <small>04/05/2023 11:32:34 AM</small> | Not Collected <small>02/14/2023 12:36:29 PM</small> | Not Collected <small>02/14/2023 12:36:29 PM</small> |
| 197 | Crosswalk of Charter Schools to Management Organizations | 04/26/2023 11:59:59 PM | Not Collected <small>02/14/2023 10:15:21 AM</small> | Not Collected <small>02/14/2023 10:15:21 AM</small> | Ready to Submit <small>04/05/2023 11:13:57 AM</small> |

1 of 1
<<
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1
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>>
20

Cancel
Submit

Figure 8.6 Submit data pop-up when two FSs are required to be submitted together as a ‘data package’

Within a data package, if at least one of the files has at least one required level not in the *Ready to Submit* status, the **Submit** option will not appear in the kebab menu for either file.

8.2 Making Updates to Submitted Data

Important! Updates can be made to data files, metadata and/or data notes after data have been submitted *as long as the due date has not passed*.

Making updates will change the status on the Submission List. Follow the process of submitting the data again to complete the submission process.

If updates to data need to be made after a due date has passed, please contact PSC.

9.0 State Submission Plan

The SSPs in EDPass are only for SY 2022-23 and later. The SSP for SYs 2021-22 and prior are maintained in *EMAPS* (contact PSC for assistance).

The SSP page in EDPass only allows users with appropriate permissions to edit the SSP.

To access the SSP for any data file, select **SSP** from the kebab menu on the Data Submission List page (see fig 9.1).

| Due Date | SY | FS # | File Specification Name | SEA | LEA | SCH | SSP |
|---------------------------|-----------|------|-------------------------|---|----------------------------------|----------------------------------|--|
| 04/26/2023 11:59:59 PM | 2022-2023 | 029 | Directory | Errors 03/12/2023 08:01:44 PM | Errors 03/12/2023 10:21:22 PM | Errors 03/12/2023 10:18:42 PM | Updated 03/13/2023 04:06:27 DQ Results SSP Download Data |
| 04/26/2023 11:59:59 PM | 2022-2023 | 039 | Grades Offered | Not Collected 03/01/2023 08:53:34 PM | Errors 03/12/2023 10:18:43 PM | Errors 03/12/2023 10:18:25 PM | |

Figure 9.1: Accessing SSP from Data Submission List for a file

The rows of the SSP are:

| Label of row | Description of details |
|-------------------------------|--|
| Status | Displays the status for each level generated from the Data Submission List with date and time that the status was last changed |
| Data Anomaly | Used to indicate when a data anomaly exists |
| Timely | Used to indicate when data will not be timely |
| Expected Late Submission Date | Required when data will not be timely |
| Notes | General comment field (optional); Response is required when Data Anomaly = Yes and/or Timely = No |

Items to note about the SSP:

- The date and time are in Eastern Time Zone
- The *Notes* field has a character limit of 4,000
- The Education unit levels not collected by EDFacts appear as **Not Collected** in the SSP with the update fields greyed out
- The Education unit levels (or files) not required to be submitted per the program office's approval appear as **Not Required to Submit** in the SSP with the update fields greyed out

9.1 Updating the SSP

Updates to the SSP can only be made by users with appropriate permissions (see figure 9.2).

- If you have permissions, the **EDIT** button can be selected in the top right corner to make updates
- If you do not have permissions, the information for that file is view only

Once the appropriate updates have been made, select **SAVE**.

To download the information entered for the file specification, select the download icon next to the **EDIT** button.

To return to file page, select **Data Submission List** from the menu bar.

SY 2022-2023 FS029 (Directory) Due 05-03-2023 11:59:59 PM

The following actions can be performed on this SSP page:

- Add a general data note with information about this file.
- Indicate that there is a data anomaly for this file/level and provide an explanation.
- If unable to submit a file by the due date, indicate that the file/level will not be timely and (1) provide the reason the submission will not be timely, and (2) enter the date by which the file is expected to be submitted.

| | SEA | LEA | SCH | Notes |
|-------------------------------|----------------------------------|----------------------------------|----------------------------------|-------|
| Status | Errors 04/26/2023 10:30:17 AM | Errors 04/26/2023 10:30:17 AM | Errors 04/26/2023 10:30:17 AM | |
| Data Anomaly | No | No | No | |
| Timely | Yes | No | Yes | |
| Expected Late Submission Date | mm/dd/yyyy | 03/14/2023 | mm/dd/yyyy | |

BACK CANCEL SAVE

Figure 9.2: State Submission Plan in EDPass

9.1.1 Status

The *Status* field of the SSP is automatically generated based on the Data Submission List page. Seven statuses can be assigned to a file in EDPass; these are listed in [Section 5.1.1 File Status](#).

9.1.2 Data Anomalies

This is a manual **Yes/No** selection. The default is **No**.

SEA users may indicate if there is an existing data anomaly for the data uploaded for a file. If **Yes**, a comment is required in the *Notes* field.

9.1.3 Timely and Expected Late Submission

Timely is a manual **Yes/No** selection. The default is **Yes**.

NOTICE

Marking data as not timely does not change the due date.

If your state will not be able to submit data by the due date, select **No** must be selected from the dropdown and a comment entered in the *Notes* field.

When Timely = **No**, an expected late submission date and a comment is required. To select a date, click the calendar icon; a calendar will appear. Select the month, year, and day the data are expected to be submitted; the date will automatically populate into the field. An explanation is required in the *Notes* field. If a comment is not entered, an error message will display at the top of the screen (see fig. 9.3).



Figure 9.3: Error message upon attempting to save when Timely = No and a comment is not entered

If a file has been updated with Timely = **No** but the files will actually be submitted on time (by the due date), the SSP must be updated manually. Access the SSP for the file, select the date field and remove it entirely, manually change Timely = **Yes**, then remove the comment that was previously required. Be sure to follow these steps.

9.2 Downloading the SSP

To download the SSP page for a file, select the download icon on the top right of the page. To download the SSP for all ED*Facts* file specifications, contact PSC for assistance.

Note! On the downloadable version of the SSP, the columns are labeled slightly different than the column titles on screen. In the report they are: *General Note*, *Data Anomaly Data Note*, and *Timely Data Note*. This will be enhanced in a future release of EDPass, and the user guide will be updated to reflect those enhancements.

10.0 Downloading Data in EDPass

To download data for a particular file specification or metadata collection, select **Download Data** from the kebab menu on the respective Submission List page (see fig. 10.1).

| Due Date | SY | FS # | File Specification Name | SEA | LEA | SCH | SSP |
|------------------------|-----------|------|-------------------------|---|----------------------------------|----------------------------------|-----------------------------------|
| 04/26/2023 11:59:59 PM | 2022-2023 | 029 | Directory | Errors 08/12/2023 08:01:44 PM | Errors 08/12/2023 10:21:22 PM | Errors 08/12/2023 10:18:42 PM | Updated 08/19/2023 04:08:27 AM |
| 04/26/2023 11:59:59 PM | 2022-2023 | 039 | Grades Offered | Not Collected 08/01/2023 08:52:34 PM | Errors 08/12/2023 10:18:43 PM | Errors 08/12/2023 10:18:25 PM | Upd 08/11/2023 |

Figure 10.1: Selecting Download Data from the kebab menu for FS029 – Directory file specification

A pop-up will appear on the screen. Choose the level of data to download and the version (see fig. 10.2).

- The *In Progress* version will include data that has been uploaded, but not yet submitted in EDPass at the chosen level(s), for that file specification (even data

have been submitted in EDPass, this option will only choose data that is currently uploaded).

- The *Submitted* version will include data that has been submitted in EDPass, at the chosen level(s), for that file specification (even if data have been uploaded in EDPass, this option will choose data that has been submitted).
 - The *Submitted* option will be greyed out until data has been submitted in EDPass.

Figure 10.2: Selecting file specification level and version to download

10.1 Download Directory and Grades Offered Data

The **Download Data** option from the kebab menu on the Data Submission List page for the FS029 file is designed to replace the now retired *EMAPS* Directory Extract Reports. Downloading the data after FS029 and FS039 are successfully uploaded allows reviewing FS029 Directory and FS039 Grades Offered LEA and SCH-level data in EDPass (before or after submission) and obtaining newly generated NCES IDs for new or added schools.

This data extract can be generated by anyone with the View functionality for the Directory and Grades Offered data area (see fig. 10.3). Follow the steps earlier in [this section](#) to download an extract.

| Due Date | SY | FS # | File Specification Name | SEA | LEA | SCH | SSP |
|------------------------|-----------|------|------------------------------|---|----------------------------------|----------------------------------|-----------------------------------|
| 04/26/2023 11:59:59 PM | 2022-2023 | 029 | Directory | Errors 09/12/2023 08:01:44 PM | Errors 09/12/2023 10:21:22 PM | Errors 09/12/2023 10:18:42 PM | Updated 09/19/2023 04:08:27 AM |
| 04/26/2023 11:59:59 PM | 2022-2023 | 039 | Grades Offered | Not Collected 09/01/2023 08:53:34 PM | Errors 09/12/2023 10:18:43 PM | Errors 09/12/2023 10:18:25 PM | U: 09 |
| 04/26/2023 11:59:59 PM | 2022-2023 | 100 | Charter Authorizer Directory | Errors | Not Collected | Not Collected | |

Figure 10.3: Downloading 029 and 039 data from FS029 – Directory on the Data Submission List

Note! Downloading the Directory data, prior to successfully uploading the FS039 file, will result in the grades data displaying as blank cells.

10.2 Obtaining New NCES IDs

Upon uploading a directory file with LEAs or schools assigned a status of New, Added or Future and a blank NCES ID field, EDPass will assign a new NCES ID if that entity does not already exist in the database¹. After the file uploads successfully, download the data from the Data Submission List kebab menu and obtain the NCES IDs from that output report.

¹ SY 2022-23 Directory data is available in the EDPass database in order for year-to-year business rules to run (such as existing entities and operational statuses comparisons). If your SEA needs to update the SY 2022-23 Directory data, submit a formal correction opportunity request and/or contact PSC for assistance.



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