

Data Cleanup Plan

Prior to July 1, 2013 Release of New Iowa IDEA

Goal

To move only “clean data” to the production site.

Timelines

August 21, 2012	Discuss data cleanup plan at data entry personnel meeting
September 4, 2012	Rollover data from current databases to test site
December 4; 10:00 AM – 11:30 AM	Data Clean Up Work Session via ICN for primary data entry persons
December 11; 10:00 AM – 11:30 AM	Data Clean Up Work Session via ICN for primary data entry persons
December 19; 10:00 AM – 11:30 AM	Data Clean Up Work Session via ICN for primary data entry persons
January 8, 2013	Rollover data from current databases to test site
TBD	Final rollover data from current databases to test site
January – June 27, 2013	Monitor data that have been cleaned up previously and correct, as applicable
June 27, 2013	Sign off by AEA primary data entry person that data cleanup has been completed
June 29 – 30, 2013	Final rollover of data from current systems to the new Iowa IDEA

Data Clean Up Work Sessions

- A. Outcome: The “Position” field is filled in for each active service location record.

Rationale: Page F output displays the provider position, not the name of the provider. In order to eliminate the need for staff to type in the position, the Position code will default from the staff assignment. It is possible that the Position code may be different for different assignments for the same staff person.

Data entry personnel will:

1. Review the Excel output and enter a “Position” code for any active service location record where this field is blank.
2. Provide input on what to do with any records for which “ownership” is unclear or are outside of expected parameters.

July 25, 2012

Preparation:

1. Operations Work Group (OWG) will modify/update the Position table.
2. Programmers will modify the current IMS application so "Position" defaults from the Staff Demographic screen. This will assist the data entry persons with new records.
3. Programmers will prepare the Excel output.
4. Programmers will make the Excel output available, as needed, to the data entry personnel.

B. Outcome: To transition to the usage of standard generic Staff Demographic records.

Rationale: It is recognized that generic Staff Demographic records serve a purpose. Rather than to have each AEA create and maintain their own generic Staff Demographic records, which increases the system security risk, one standard set of generic records will be created and used by all AEAs.

Data entry personnel will:

1. Review the Excel output and change the active staff assignments which use a generic staff record to the standard generic staff record.
2. Inactivate generic Staff Demographic records that are not the new standard.
3. Check or uncheck the generic checkbox in the active Staff Demographic records, per the definition of Generic staff.
4. Provide input on what to do with any records for which "ownership" is unclear or are outside of expected parameters.

Preparation:

1. Ask the OWG to define what a generic staff person is, develop guidelines on how to use this designation and identify standard generic staff records to be added.
2. Ask OWG to determine the "Position" for the standard generic staff.
3. Center staff will add standard generic staff person records in the Staff Demographic file.

C. Outcome: Each staff associated with an active service is accurate.

Rationale: After July 1, 2013, if a staff person is incorrectly associated with a service, the providers can only be changed via an amendment (without a meeting).

Data entry personnel will:

1. Sort and filter a list of all active services in the Excel output in various ways to review the accuracy of the data.
2. Provide input on what to do with any records for which "ownership" is unclear or are outside of expected parameters.

Preparation:

1. Programmers will prepare the Excel output.

2. Programmers will make the Excel output available, as needed, to the data entry personnel.

D. Identify active staff who do not have usernames and passwords.

Rationale: If a staff person is labeled as “active”, that person needs a username and password. To not fill those out and to be pulled over to the new system would create a security risk. And if the appropriate staff is not pulled over, there is also a risk that a staff, who is currently associated with a service, will not be associated with a service in the new system.

Data entry personnel will:

1. Review an Excel output of all active records in the Staff Demographic file. If a staff person has a username, that person must also have a password.
2. Provide input on what to do with any records for which “ownership” is unclear or are outside of expected parameters.

Preparation:

1. Programmers will prepare the Excel output.
2. Programmers will make the Excel output available, as needed, to the data entry personnel.

E. Cleanup the Department lookup table in IMS

Rationale: This lookup tables contains values that seem to no longer be relevant or are specific to an AEA.

Data entry personnel will:

1. Review an output of all active values in the Department lookup table via an Excel output.
2. Provide input on those values that are no longer needed so the programmers may inactivate them.
3. Provide input on what to do with any records for which “ownership” is unclear or are outside of expected parameters.

Preparation:

1. Programmers will prepare the Excel output.
2. Programmers will make the Excel output available, as needed, to the data entry personnel.

F. Cleanup the Department file in IMS.

Rationale: This file contains values that seem to no longer be relevant or are specific to an AEA. Note: In the new system, this screen will be renamed to Staff Access.

Data entry personnel will:

1. Review an Excel output of all active records.
2. Inactivate records that are no longer relevant.
3. Provide input on what to do with any records for which “ownership” is unclear or are outside of expected parameters.

Preparation:

1. Programmers will prepare the Excel output.
2. Programmers will make the Excel output available, as needed, to the data entry personnel.

- G. Ensure that AEAs are aware of the data in the modules which will be discontinued or retired.

Rationale: As of July 1, 2013, data will no longer be able to be saved in retired or discontinued customized modules, even though IMS will still be used. AEAs will be given a list of the data in those modules.

Data entry personnel will:

1. Review, via an Excel output, the customized modules data that will be retired or discontinued.
2. Provide input to the Center staff on whether or not they need access to these data when the new system is released.
3. Provide input on what to do with any records for which "ownership" is unclear or are outside of expected parameters.

Preparation:

1. Programmers will prepare the Excel output.
2. Programmers will make the Excel output available, as needed, to the data entry personnel.

Other Actions:

1. With the exception of the Hearing Screening, programmers will disabled the Save or New button in the following customized modules:
 - a. Additional Child Info
 - b. Student Comments
 - c. Review Data
 - d. Pooling
 - e. Auto Text
 - f. Student Minutes
 - g. Inventory
 - h. CEC Follow Up
 - i. Course Information
 - j. Course Enrollment
 - k. Projection
 - l. Work Study
 - m. Date Information

Note: Hearing Screening will be available until HearForm is functional.

- H. Clean up duplicate Staff Demographic records.

Rationale: There should be just one Staff Demographic record per person, even if that person moves between districts or AEAs. There are some instances where more than one Staff Demographic record exists for

one person.

Data entry personnel will:

1. Identify duplicates through various sorts in the Excel output, including e-mail address.
2. Inactivate duplicate Staff Demographic records.
3. Provide input on what to do with any records for which "ownership" is unclear or are outside of expected parameters.

Note: This item also relates to item A, generic staff.

Preparation:

1. Programmers will prepare the Excel output.
2. Programmers will make the Excel output available, as needed, to the data entry personnel.

I. Clean up the District file.

Rationale: This file contains values that seem to no longer be relevant or are specific to an AEA.

Data entry personnel will:

1. Review an Excel output of all active records.
2. Inactivate records that are no longer relevant.
3. Provide input on what to do with any records for which "ownership" is unclear or are outside of expected parameters.

Preparation:

1. Programmers will prepare the Excel output.
2. Programmers will make the Excel output available, as needed, to the data entry personnel.

J. Clean up the Building file.

Rationale: This file contains values that seem to no longer be relevant or are specific to an AEA.

Data entry personnel will:

1. Review an Excel output of all active records.
2. Inactivate records that are no longer relevant.
3. Provide input on what to do with any records for which "ownership" is unclear or are outside of expected parameters.

Preparation:

1. Programmers will prepare the Excel output.
2. Programmers will make the Excel output available, as needed, to the data entry personnel.

Other

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1. Operations Work Group will define the Basis for Enrollment Codes.
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