

# Start of Program Year 23-24 Quick Start Guide

Once eData opens for the current program year (PY), agencies beginning data entry should follow the processes outlined below.

**NOTE:** Complete requirements and policy guidance for data collection and program performance can be found on the PDE website on the Division of Adult Education's [Administrative Documents page](#).

# Program Year 23-24 in eData

Data entry cannot begin until the eData system opens and an agency has an approved contract(s) uploaded into the eData system. Agencies beginning data entry should follow the processes outlined in this document. For complete details and guidance on data entry into the eData system, please consult the [eData Manual and Glossary](#).

For additional information, please contact:

**eData Tech Support at 1-877-857-8869 or [eDataTechSupport@psu.edu](mailto:eDataTechSupport@psu.edu)**

**Note:** Complete requirements and policy guidance for data collection and program performance can be found on the PDE web site on the Division of Adult Education’s [Administrative Documents page](#).

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# Getting Started

## eData Agency Details Screen

Users are required to review their Agency Details screen in eData. Information on this page should be kept current, so agencies can contact each other when sharing adults and resolving duplicate record issues. Each agency must have at least one staff member assigned to the Agency Contact role in eData. An eData Local Security Administrator must complete this step of assigning a staff member to this role. Instructions for assigning users to groups are found on the [eData Help Documents web page](#).

Agencies may also choose to enter an Alternate Agency Name on this screen. When entered, the Alternate Agency Name appears in place of the given name throughout eData. Updating this information requires Agency Administrator access.

## General Tips about Adult Rollovers into PY 23-24

- Adult records cannot be saved unless all *required* fields on the Adult Details page are entered. Users should roll over adult records using the directions listed on page six of this document. This will ensure that the correct adult, with an existing PAsecureID, is rolled over.
- All records and data for Program Year 22-23, and any prior year, will remain in eData. They will always be viewable by selecting the appropriate year on the eData Home screen.
- Records from a prior year may be rolled into the new program year. Records entered in prior years within your agency can be rolled over using the procedures below. All other students will need to be entered following the instructions outlined in the eData System Manual/Glossary.
- Contract numbers are loaded from eGrants into eData once they reach the eData accepted status. Contact eData Tech Support about any missing or erroneous contract numbers.
- All contract numbers have program components. Check that contract numbers and program components are correct on the Contract Details-Bureau Funded screen; contact eData Tech support if there are any problems.
- When adult records are rolled over, some fields are automatically populated. The data in these fields should be verified, and then all other data must be entered for the new program year prior to saving the record. If any locked field for a rollover adult is incorrect, such as First Name, Last Name, DOB, or SSN, roll over the adult record as-is and contact eData Tech support to correct the error.

## **Continuing Student or Returning Student**

Below are the definitions for “continuing student” and “returning student” and related guidance for conducting intake and data entry for students who have previously attended adult education and/or family literacy services.

### ***Continuing Student***

From one program year to the next, a student should be considered a “continuing student” if there is a gap of no more than 90 days in instruction for that adult from one program year to the next.

For example, Anytown ABE at City Library class ends on June 30, 2023. The next session that students can attend starts on September 10, 2023. A student who attended class through June and starts up again in September is considered a “continuing student.”

Agencies are not required to have continuing students (as defined above) complete a new intake form. All adult information, except address/email/phone number updates, must remain the same as at original intake, including Labor Force Status.

Agencies should enter an SID number for continuing students in corrections. The SID number is not a required field, but attempts should be made by agencies to collect this information. SID numbers are eight-digit numbers.

### ***Returning Student***

Any student who leaves a program during one program year (PY) and who later returns in a subsequent PY, that does not meet the above criteria of a continuing student, is a “returning student.” Agencies must have returning students complete a new intake form and enter the new intake information into eData.

## Data Entry at Beginning of Program Year

This is the suggested order for data entry based on system design. Other entry methods are possible but are not recommended. In addition to the data entry order presented below, data should be entered in chronological order.

1. Update Agency Contact information, if needed
2. Rollover or add Classes
3. Rollover or add Staff
4. Rollover or add Groups
5. Rollover or add Adults
6. Rollover or add Pairs
7. Family literacy rollover or add Families
8. Family literacy rollover or add Children

## Steps for Beginning Program Year 23-24 in eData

**Update Agency Contact Information** - Begin by updating your Agency Details screen for PY 23-24. On the Agency Details page, review the Contact Details section. If this section is blank, users must assign a person as their eData contact. *An eData Local Security Administrator user must complete this step. See the eData Help document "How to Become an Application User" for more information.*

**Verify Contract Numbers** - Check the number of adults contracted to be served under each contract number and program component. For contracts beginning with 054, the number of families contracted to be served is listed, in addition to the number of adults and children.

**Rollover Classes:** To roll over a class:

1. Select Class Details-Rollover Class from the Agency menu.
2. In the Class Rollover Search screen, click the Search for Rollover button without entering any search criteria to view all class records or enter criteria to narrow the search.
3. Click the Select link to select the appropriate class.
4. Enter all required fields and click Save and Rollover.

**NOTE:** If a Class record is inadvertently rolled over, it cannot be deleted. Use caution when rolling over classes.

***Rollover Staff*** - To roll over a staff record:

1. Select Staff Details-Rollover Staff from the Agency menu.
2. In the Staff Rollover Search screen, click the Search for Rollover button without entering any search criteria to view all staff records or enter criteria to narrow the search.
3. Click the Select link to select the appropriate staff member.
4. Enter all required fields and click Save and Rollover.

**NOTE:** If a Staff record is inadvertently rolled over, an Agency Data Administrator user can delete it. Staff records deleted in one program year will not affect the Staff records in prior years.

***Rollover Groups*** - To roll over a Group record:

1. Select Group Details-Rollover Group from the Agency menu.
2. In the Group Rollover Search screen, click the Search for Rollover button without entering any search criteria to view all group records or enter criteria to narrow the search.
3. Click the Select link to select the appropriate group.
4. Enter all required fields and click Save and Rollover.

**NOTE:** If a Group record is inadvertently rolled over, it cannot be deleted. Use caution when rolling over groups.

***Rollover Adult - IMPORTANT:*** Before rolling over an adult, review the section “Continuing Student or Returning Student” on page four of this document.  
To roll over an Adult record:

1. Select Adult Details-Rollover Adult from the Agency menu.
2. In the Adult Rollover Search screen, click the Search for Rollover button without entering any search criteria to view all adult records or enter criteria to narrow the search.
3. Click the Select link to select the appropriate adult.
4. The Program Year fields of the adult record will be blank, in addition to the Ethnicity field in the Adult Demographics section. Only the static fields in the Demographic details section will contain data but all required fields must be filled in prior to clicking the Save and Rollover button. The assignments, assessment, and outcomes tabs contain yearly data and will be empty.
5. If an Adult record is inadvertently rolled over, it can be deleted. Click the Mark for Deletion button and enter a detailed explanation in the Reason for Deletion text box.

**NOTE:** The Ethnicity values changed starting in the 2010-11 program year. When rolling over an adult from a year prior to 2010-11, the ethnicity field will appear blank for rollover adults. For more information on the new Ethnicity values, please refer to the eData Glossary. In addition, Highest Grade completed changed in 2012-13. This requires users to select US-Based or Non-US based schooling, in addition to the highest grade completed for any adult in the eData system that is rolled over from a year prior to 2012-13.

***Rollover Pairs***—Adult and Staff records must be rolled over before their Pair can be rolled over. To roll over a Pair:

1. Select Pair Details-Rollover Pair from the Agency menu.
2. In the Pair Rollover Search screen, click the Search for Rollover button without entering any search criteria to view all pair records or enter criteria to narrow the search.
3. Click the Select link to select the appropriate pair record.
4. Enter all required fields and click Save and Rollover.

***Rollover Family/Child*** — the Family Adult record must be rolled over prior to rolling over the family/child(ren). To roll over a Family:

1. Open the Adult record.
2. Scroll to the bottom of the Adult Details screen and click the Rollover Family Info button.
3. Select the Family record you would like to roll over – it is possible that the Family was duplicated or appears in multiple years. If multiple Family records appear, select the most recent Family record.
4. Enter all required fields and click Save and Rollover. The Rollover Family Info screen will reload.
5. Select the Child you would like to roll over – it is possible that the Child was duplicated or appears in multiple years. If multiple Child records appear, select the most recent Child record.
6. Enter all required fields and click Save and Rollover. The Rollover Family Info screen will reload.
7. Continue selecting Adult and/or Child records until all participating members of the family are rolled over.
8. If a Family record is inadvertently rolled over, it can be deleted by Agency Data Administrator users. Family records deleted in one program year will not affect the family records of other years.

## ***Duplicate Adult Records***

Exercise caution when entering adult records so that duplicate records are not created. If the system identifies potential duplicates, carefully check each possible duplicate for matches on name, social security number, date of birth, and other identifying fields. Data entry staff are strongly encouraged to review the possible duplicate record section of the System Manual. Duplicates can be difficult to resolve after they are created, particularly if they involve multiple agencies. If in doubt about how to handle a duplicate record, call eData Tech Support at 877-857-8869.

Agencies must be proactive in preventing duplicate adult records. Take special care with students who have social security numbers consisting of all nines and avoid entering nicknames for students in their first and last name fields. Sometimes, during the creation of a new adult record, users may be prompted to roll over an existing adult record. In this case, if an adult name, date of birth, or social security number are incorrect but the adult otherwise appears to be a match, users should roll over the adult record and contact eData Tech Support to correct the erroneous data field(s).

## ***PAsecureID Near Matches***

When an adult record is added to the eData system, the record is checked for duplication with the adult records already in eData, including adult records from prior program years. If a duplicate record is found, the duplicate screen will appear, and users have the option to rollover or share the adult record. After duplicate resolution within the eData system is complete, the record is sent to the PAsecureID system where it is checked for duplication in that system.

The PAsecureID system checks certain key fields to verify the record, such as first, middle, and last name, date of birth, Social Security Number, Ethnicity, and Gender. If an adult matches another student in the PAsecureID system, the existing PAsecureID is imported into eData and appears in the adult's record. If no matches are found, a new PAsecureID is assigned to the adult record.

If several fields match, but the PAsecureID system cannot determine if the record in PAsecureID is the same person entered in eData, PASID creates a 'near match'. In eData, the adult details screen becomes "grayed out", all fields become locked and an error message appears below the Save button that states "Adult is inactive because of a near match." **The adult will remain locked in eData until the near match record is resolved by contacting eData Tech Support.**

When contacting eData Tech support to resolve a near match, it is helpful to have the student's file at hand. Additional information about the following may help to resolve the issue, including the adult's:

- previous Pennsylvania school/school district attended
- highest grade completed
- full middle name
- current or previous other names

### ***Adult Assessment Rollover***

Adult assessments may be rolled over from the Adult Assessment tab. The only assessments available for rollover in eData will be those given by the agency entering data for that adult. Click the Rollover Assessments link to view assessments from 22-23 that are valid for rollover then select the appropriate assessment to roll over.

An assessment must be dated within 150 days of the adult's current year start date to appear on the rollover screen. If an assessment was given in last program year and was not entered into the eData system but it is still within 150 days of the current year start date, the assessment may be added to eData manually.

For additional information on adult assessments, please refer to [Division of Adult Education Policy D.100 - Adult Assessments](#).

### ***Adult Outcomes***

All Core Outcomes are set automatically in the eData system, except for the Obtain Secondary Credential outcome. Users may use the set date in the Obtain Secondary Credential outcomes for local reporting purposes, but this date is not used for data matching. Secondary outcomes are optional and may be set if applicable to the adult; refer to the eData System Manual/Glossary for detailed outcome information or [Division of Adult Education Policy C.135 - Core Outcomes](#).

### ***Adult Instructional Hours***

When adding instructional hours that include a portion of an hour, users should consult the Instructional Hours Conversion chart for the appropriate number of hours to enter into eData. This document is available on the PA Adult Education Resources website in the eData Help Documents section.

### ***eData Annual Changes and Updates***

Users should consult the current program year's eData Manual/Glossary for any updates to the eData system and for changes to specific data entry procedures.