# WISEdata Snapshot Preparation TEXT ONLY SUPPORT Doc

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## WISEdata Snapshot Preparation for Charter Schools

## Reporting Deadlines and Snapshots

* **Summer Data Quality Review - August 2023**
  + 2022-23 Year End Attendance & Discipline
  + 2022-23 Roster / Career Education
* **November 2023 - ~6 weeks prior to snapshot**
  + DPI Data Quality outreach begins
* See the [WISEdata Events](https://dpi.wi.gov/wisedata/events/upcoming) page for the most up-to-date information on snapshot training opportunities near you!

## Snapshot Reporting Requirements

* **Tuesday, December 5, 2023 Snapshot**
  + 2022-23 Year End Attendance & Completion
  + 2022-23 Year End Roster / Career Education
  + 2023-24 Third Friday of September Enrollment
  + 2023-24 October 1 Child Count
  + 2023-24 Graduation Requirements
  + 2023-24 Digital Equity Data (recommended, not required)
* **May 2024 Snapshot *(TBD)***
  + 2023-24 Spring Demographics

## Snapshot Purpose: Why We Collect Data

The snapshots will serve as the permanent data source for certified reporting by DPI. Snapshot data is used for the following:

* [Federal reporting](https://dpi.wi.gov/wise/federal-reporting), including [ESSA](https://dpi.wi.gov/accountability)
* Public Reporting in the [WISEdash Public Portal](https://dpi.wi.gov/wisedash)
* [Accountability Report Cards](https://dpi.wi.gov/accountability/report-cards)
* Some funding determinations, such as [IDEA](https://dpi.wi.gov/sped/educators/fiscal/allocations), [high poverty aid](https://dpi.wi.gov/sfs/aid/categorical/aid-high-poverty-districts), [maintenance of effort (MOE)](https://dpi.wi.gov/sped/educators/fiscal/maintenance-of-effort), and others.

## Data Flow for Snapshot

Data is:

* entered into your vendor tool (SIS, Special Ed tool, etc.)
* pushed to WISEdata and run through data quality checks (validations)
* validated in the system on the day and time of the snapshot, loaded to WISEdash, and “snapped” for reporting purposes

Users can use WISEdata Portal validation results to go back to their vendor tool to make corrections and push the corrected data to WISEdata through December 5.

## Data Flow Diagram

***IMAGE***: An infographic showing data flow from LEA/School/District to Student Information System (SIS), to WISEdata Portal, to WISEdash for Districts, to Report Cards.

* LEAs, Data Entry: school/district collects student data and enter into the local SIS.
* LEAs, SIS Vendor Tool to WISEdata Portal: LEAs push data from their SIS to the WISEdata Portal for validation.
* WISEdata Portal, Validation Review:LEAs monitor and review the errors and warnings and make any necessary corrections in their SIS.
* WISEdash for Districts: Once the data is submitted correctly, it will flow into the data warehouse, also known as WISEdash.
* Report Card: Accountability Report Card is pulled from the WISEdash for Districts.

## Goals for Dec 5, 2023 Snapshot

* All errors should be fixed, and
* All warnings either acknowledged or fixed prior to a snapshot
* This ensures the best possible data for reporting purposes.

Any data with a validation message has the potential to impact the snapshot data and subsequent reporting!

## Snapshot Preparation Steps

* Step 1: Your Vendor System
* Step 2: WISEdata Portal Tasks
* Step 3: WISEdash For Districts
* Step 4: WISEadmin Portal
* Step 5: Final Tasks

## Step 1: Your Vendor System

**At the beginning of the school year or earlier:**

* Ensure the latest version of the SIS platform is installed - we recommend making any changes at least 6 weeks prior to the snapshot.
* Make sure that your vendor can transmit the required data to DPI for required collections. Confirm using the [Vendor WISEdata Status](https://dpi.wi.gov/wisedata/schools/vendor-list) webpage.
* Be sure to attend any vendor provided training so you are clear on how to send required data to the DPI within the vendor tool and basic troubleshooting steps (e.g., full synchronization).

## Step 1: Begin Submitting Data

* Begin submitting data from your vendor tool (i.e., SIS) to WISEdata via Ed-Fi.
* Make sure all needed data is entered into SIS.
* Keep non-reporting software products synced.
* Resolve validation messages, errors, or alerts located in your SIS vendor tool.
* Points to remember:
* Missing data cannot be validated.

## Step 1: Review and Resolve L1s

* Review WISEdata Ed-Fi API Level 1 (L1) errors using your vendor report, vendor error logs, or the WISEdata Portal Home Page. These errors prevent the data from getting to DPI. If these errors aren’t cleared, you will need to request assistance from your vendor.
* You can learn more information on the [WISEdata Portal Home Page mini tutorial](https://dpi.wi.gov/wisedata/help/mini-tutorials/wdp-homepage) featured on the [WISEtraining webpage](https://dpi.wi.gov/wisedata/wise-classroom).
* Resolve the WISEdata Ed-Fi API L1 errors in your vendor system and re-submit the data to the WISEdata Ed-Fi API. Repeat as needed.
* Correct ALL data with errors in your vendor system.

## Step 1: Your Vendor System to WISEdata Portal - Data Pipeline Status (*1 of 3*)

***IMAGE:*** Screenshot of the "data pipeline" graphic in WISEdata Portal. The graphic shows three horizontal bars (2021-22, 2022-23, and 2023-24). Each bar has various sections in red (critical and non-critical errors), yellow (unacknowledged warnings) and green (acknowledged warnings).

## Step 1: Your Vendor System to WISEdata Portal - Data Pipeline Status (*2 of 3*)

***IMAGE*:** A screenshot of another section of the WISEdata Pipeline Status: Vendor to WISEdata Communications Status.

* Current School Year Transactions:
* “i” = none in past 24 hours
* Green = within past 24 hours and successful
* Red = within past 24 hours with some errors

## Step 1: Your Vendor System to WISEdata Portal - API Error Drill Down

***IMAGE*:** A screenshot of the API Error Drilldown section of the WISEdata Portal Data Pipeline Status screen. This table displays the name of the data collection, an error count of that data, a success count of that data and a date/time stamp of the last transaction between the DD tool and WDP.

## Step 1: Your Vendor System to WISEdata Portal - Data Pipeline Status (*3 of 3*)

***IMAGE***: A screenshot of the API Error Drilldown section of the WISEdata Portal Data Pipeline Status screen. This table displays the name of the data collection, an error count of that data, a success count of that data and a date/time stamp of the last transaction between the DD tool and WDP.

* Current School Year Data:
* Green: data<= 2 days old
* Red: data> 5 days old

## WISEdata Portal – Data Quality

***IMAGE*:** A screenshot of WISEdata Portal, Validation message Summary screen.

## Step 1: WISEdata Portal - Data Quality Indicators

***IMAGE***: A screenshot of the WISEdata Portal Data Quality Indicators. Two bar graph sets are on display: Current year enrollments, and enrollment count dates. These 'DQI's’ can be filtered using the drop-down menus and the radio-button options on screen.

* Click the information icon next to the Data Quality Indicator to get in-line help about the graphs. This help is specific to each Collection that is selected.
* Enrollment Current vs. Count Date
* Attendance, Discipline

## Step 2: WISEdata Tasks, Imports and Validations (*1 of 2*)

* [Run Import & Validation in the WISEdata Portal](https://dpi.wi.gov/wisedata/help/mini-tutorials/wdp-validations).

***IMAGE***: A screenshot of the "Queue Import and Validation" button users can use to push data manually if they don't want to wait for the nightly upload.

* This will import the data from WISEdata Ed-Fi into the WISEdata Portal and then run validations.
* If the Import & Validation job is not manually queued, it runs for all agencies around 5pm.

## Step 2: WISEdata Tasks, Imports and Validations (*2 of 2*)

* A validation request is queued with a projected time of processing
* Look to see that validation has completed…
* Or use the email feature!
* This can be requested from either the:
* Home page
* Validation Messages page

## Step 2: WISEdata Tasks: Review Validations

* Once the validation step is complete, [**review data quality metrics and validation errors**](https://dpi.wi.gov/wisedata/help/mini-tutorials/wdp-overview) in the WISEdata Portal on the Validation Messages page.
* Repeat as necessary.

## WISEdata Tasks: Correct Validations in SIS

* In your vendor system, correct the data containing validation errors and warnings.
* Visualize the numbers of errors & warnings on the Data Quality page and utilize the metrics to look for odd or unusual patterns.
* **Prioritize critical errors**. Data with critical validation errors may not be loaded to WISEdash or otherwise will have a large impact on your resulting data.
* In the WISEdata Portal--Validation Messages page, utilize the **Validation Category filter** to focus on validations relating to topics the snapshot is capturing for the selected School Year.

## WISEdata Portal: Types of Validation Messages

***IMAGE*:** Screenshot of WISEdata Portal listing a series of validations.

* Click the black information icon to see more information about the validation!

## WISEdata Portal: Types of Validation Messages

* ~200 validation rules.
* User can manually trigger validation, or it runs overnight.
* [**List of Validations**](https://docs.google.com/spreadsheets/d/10Wk6o20-HSw6qed7EK7nso0-eK9n1W9Ped9MRcM_4Mo/edit#gid=0).
* Critical icon (red filled in circle with a white exclamation point) indicates a severe error that will greatly impact snapshot data.
* Error icon (red outline circle with a red X in it) indicates data is submitted incorrectly.
* Warning icon (orange/yellow outline triangle with an exclamation point) indicates something may be wrong with the submitted data but not necessarily.

## WISEdata Portal Example: Student Detail Validation

***IMAGE*:** A screenshot of a student specific details screen on WDP, with the Enrollments section expanded. This student is displaying Error 6376.

## WISEdata Portal: Exports

***IMAGE*:** A screenshot of the Exports screen in WISEdata Portal.

**Exports:**

* Multiple export files.
* Tool to view data comparisons.
* Files for each data collection.

## Step 2: WISEdata Data Quality Alerts (1 of 3)

* To cut down on the number of data quality emails from the Customer Services Team, Data Quality alerts are also displayed in WISEdata Portal.

***IMAGE*:** Screenshot of a WISEdata Portal Data Quality Alert.

* Click the ‘Learn More’ button to be taken to the Alert page to see the details.

## Step 2: WISEdata Data Quality Alerts (2 of 3)

* Follow the instructions to investigate, review, and/or correct your data.

***IMAGE*:** A screenshot of the WISEdata Portal Data Quality Alert instructions.

## Step 2: WISEdata Data Quality Alerts (3 of 3)

* Acknowledge the alert once you follow the Instructions in the Important Information section of the page.

***IMAGE*:** Screenshot of a Data Quality Alert reminder in WISEdata Portal.

* Only the Primary or Secondary WISEdata contact can acknowledge the alerts.

## Step 2: Reviewing WISEdata Tasks

Prior to a snapshot: make sure that:

* all errors are resolved.
* all warnings are either acknowledged or resolved.

Look for and read notifications from the DPI Customer Services Team.

* Operational data quality checks.
* May reach out to you to help with specific issues they find.
* ~6-8 weeks leading up to the snapshot.

## Snapshot Preparation Summary

Use WISEdata Regularly:

* You and your team should be checking the WISEdata Portal weekly, if not daily.
* It’s critical that this is a team process, not just one person in the office.
* **Remember!** Frequent, regular review means less burden at snapshot time!

Use WISEdata to prep for Snapshot:

* In the 6-8 weeks prior to a snapshot, review the data weekly.
* Include anyone who has reason to use or know about the data: assessment, accountability directors, principals, food service directors, special ed directors, etc.

## Step 3: WISEdash for Districts

* [WISEdash for Districts – Training and User Guide pages](https://dpi.wi.gov/wisedash/districts/user-guide)
* https://dpi.wi.gov/wisedash/districts/user-guide

## WISEdash for Districts: Source of Snapshot Data

* Snapshots are taken of data in the WISEdash “data warehouse.”
* Use WISEdash to review your reporting data before a snapshot.
* Additional charts and graphs.
* Available to public schools only.
* Reminder!
* Data is updated *NIGHTLY*
* from WISEdata Portal to WISEdash for Districts.

## WISEdash for Districts: Available Snapshot Dashboards

* [**WISEdash for Districts Training - How-To: Locate the Snapshot Data *https://dpi.wi.gov/wisedash/districts/user-guide/locate-snapshot***](https://dpi.wi.gov/wisedash/districts/user-guide/locate-snapshot)
* Third Friday of September (TFS) Count Date
* Oct 1 Child Count
* Attendance
* Discipline
* YE (Year-End) Completion
* Career Education and Coursework
* Perkins
* Spring Demographics Snapshot (May)
* Tip! Be sure to scroll all the way to the bottom of these dashboards so you know all of the types of charts available to you for data review.

## WISEdash Snapshot Dashboards: Data Quality Indicators

* **Informational** **indicator:** Highlight important counts or percentages for the topic at hand.
* **Caution indicators:** Show questionable data in need of review.
* **Goal: 0 indicators:** Similar to cautions but suggest a goal such as a school count.

***IMAGE*:** A screenshot of the snapshot dashboard Data Quality Indicators on WISEdash for Districts.

## WISEdash Snapshot Dashboards: Dynamic Crosstabs

* Many of the snapshot dashboards utilize crosstab metrics that function much like pivot tables in Excel. Drag and drop the Data Fields to either the Rows or Columns area to create a detailed chart.
* Common demographics:
* Race, Disability, Econ or ELL status

***IMAGE*:** A screenshot of a Third Friday of September WISEdash for Districts dynamic crosstabs and the available filters.

## WISEdash Snapshot Dashboards: Year over Year

* The primary use of the Snapshot dashboards is to compare current data to prior snapshot data.

***IMAGE*:** A screenshot of the green background on a WISEdash dynamic crosstabs, indicating data displayed is from the current view for the school year selected.

* The Green charts and selected filters represent the Current View for the selected year.

***IMAGE*:** A screenshot of the purple background on a WISEdash dynamic crosstabs, indicating data displayed is from the Snapshot view for the school year selected.

* Purple charts and selected filters represent the Snapshot View for the selected year.

## WISEdash for Districts: Top Dashboards – Trends

TABLE: Row 1:

* Dashboard Name = High School Completion Rate
* Navigation = Dashboard icon> Topics > Graduation > HS Completion > High School > Completion Rates
* Description = View 4-, 5-, 6- and 7-year rates to view trends over time.
* View **HS Completion Rate Cohorts** - especially future cohorts - to review grade level placement accuracy.

TABLE: Row 2:

* Dashboard Name = Dropout Rate by Subgroup
* Navigation = Dashboard icon > Topics > Main > Attendance-Dropouts > Dropout Rate by Subgroup
* Description = Verify the ‘Dropout Rate by [Demographic] and Year [Selected Schools]’’ metric for anomalies. Can also compare to Statewide Rate (the following metric).

TABLE: Row 3:

* Dashboard Name = Attendance Rate by Subgroup
* Navigation = Dashboard icon > Topics > Main > Attendance-Dropouts > Attendance Rate by Subgroup
* Description = Verify the last metric - ‘Attendance Rate by Year and [Demographic] [Selected Schools]’’ metric for anomalies for all students or by the demographic selected in the Group By.

## WISEdash for Districts: Top Dashboard – Grad Cohorts

* Verify grad cohort determination before it is too late to fix HS entry year and grade level.
* Graduation cohorts are typically not examined until more than three years after 9th grade entry.
* Those enrollment records can no longer be updated in WISEdata.
* It is VITAL that districts verify that each student's first HS enrollment year and grade level are correct while that year of data is still open for updates in WISEdata.

***IMAGE*:** Screenshot of a Grad Cohort dynamic crosstabs on WISEdash for Districts.

## WISEdash for Districts: Verifying Econ Status

* Economically Disadvantaged Status (‘Econ status’) can be verified in WISEdash on different dashboards, depending on the data you wish to view.
* When using a Dynamic Crosstabs, apply the ‘Econ’ filter to either the
  + TFS Count Date Snapshot Dashboard or the
  + Year End (YE) Completion Snapshot Dashboard
* You can also verify by viewing the Topics, Enrollment, All Subgroups dashboard
* You must have the role of [WISEdash for Districts user role](https://dpi.wi.gov/wise/wisehome-info/wisesecure-roles) of Economic Indicator Analyst or Economic FAFSA Access to view this data.

## WISEdash for Districts: TFS Count Date Snapshot Dashboard

***IMAGE*:** Screenshot of a TFS Enrollment dynamic crosstabs on WISEdash for Districts using the ‘econ’ filter to view economically disadvantaged and non-economically disadvantaged student data.

## WISEdash for Districts: Verifying Econ Status

***IMAGE*:** Screenshot of a Year End Completion dynamic crosstabs on WISEdash for Districts using the ‘econ’ filter to view economically disadvantaged and non-economically disadvantaged student data.

## WISEdash for Districts: Verifying Econ Status

***IMAGE*:** Screenshot of a WISEdash for Districts, Topics, Enrollment, All-Subgroups data dashboard to review economically disadvantaged and non-economically disadvantaged student data.

## Step 4: WISEadmin Portal

* Are you a District Administrator or DSA?
* Log into WISEhome, then
* Select “WISEadmin Portal.”

## WISEadmin Portal: Purpose

* For District and Choice administrators
* A centralized location for reviewing:
* WISEadmin Portal = Submitting data errata letters.

## WISEadmin Portal: Home Screen

***IMAGE*:** A screenshot of the WISEadmin toolbar: Data reporting and Snapshot (Home, Acknowledgement, Agency Contacts, Snapshot Calendar, Data Errata, Local Assessment, Data Sharing Agreement and District Library Plan), and Cyber Incidents.

***IMAGE*:** A screenshot of the WISEadmin 'home' screen: 6 tiles arranged in 2 columns, 3 rows: District Library Plan, Agency Contacts, Administrator Acknowledgement, WISEdash Key Performance Indicators, Data Errata, Local Assessment Data Sharing Agreement.

## Administrator Acknowledgement: Data Snapshot Agreement

* On the Administrator Acknowledgment page, you can review your responsibilities as district administrator over snapshot duties, as well as which contacts have acknowledged each data snapshot.

***IMAGE*:** Screenshot of the WISEadmin Portal Administrator Acknowledgements screen for Data Snapshot Agreement.

## Administrator Acknowledgement: Data Quality Agreement

* At the bottom of the page, fill out the Data Quality Acknowledgment form to:
* acknowledge your administrative responsibilities for the snapshot,
* click the check box,
* then click Submit.

***IMAGE*:** Screenshot of WISEadmin Portal Data Quality Acknowledgement screen.

## WISEadmin Portal: Snapshot Calendar

* A quick link to the snapshot calendar on the DPI website.
* Allows for quick check-ins on upcoming important dates for annual snapshots.

***IMAGE*:** Screenshot of the WISE Events Calendar showing November 2023.

## WISEadmin Portal: District Library Plan

District Library Plan

* New to WISEadmin in the 2023-24 school year.
* Board approved district library plans have been required since 1974.
* Most recently this has been reported through the Digital Learning Survey.
* More info: [**DPI ‘District Library Plan New Data Collection Tool’ webpage**](https://dpi.wi.gov/school-libraries/new-district-library-plan-data-collection-tool).
* [**Data elements page for the District Library Plan**](https://dpi.wi.gov/wise/data-elements?combined=&tid_1=All&tid_2=5091&field_tags_wise_de_years_tid=All).

## WISEadmin Portal: District Library Plan data elements (1 of 2)

* [**Date of Board Approval**](https://dpi.wi.gov/wise/data-elements/lib-plan-approval)
* Date of Board Approval data element refers to the date on which a public school/district school board approved the District Library Plan.
* [**District Library Media Specialist**](https://dpi.wi.gov/wise/data-elements/lib-plan-media-spec)
* District Library Media Specialist is actually three distinct data elements in WISEadmin Portal within the District Library Plan; however, they work together. These dates are provided from a dynamic, drop-down field in WISEadmin Portal.

## WISEadmin Portal: District Library Plan data elements (2 of 2)

* [**District Library Plan Link**](https://dpi.wi.gov/wise/data-elements/lib-plan-link)
* District Library Plan Link data element refers to the URL for the webpage that displays a school/district District Library Plan.
* [**Implementation Year From/To**](https://dpi.wi.gov/wise/data-elements/lib-plan-years)
* Implementation Year To and Implementation Year From are two distinct data elements on WISEadmin Portal within the District Library Plan; however, they work together. These dates are provided from a dynamic, drop-down field in WISEadmin Portal.

## WISEadmin Portal: District Library Plan screen

***IMAGE*:** A screen shot of the WISEadmin District Library Plan submission page, requiring the submission of board approval date, implementation year date range, library plan link, and the name and email address of the district Library Media Specialist.

## Step 5: Final Tasks Acknowledgement

Collection Acknowledgment

* [**Acknowledge**](https://dpi.wi.gov/wisedata/schools/acknowledgment-text) each data collection in the WISEdata Portal before the snapshot of that particular data collection.
* Acknowledgments are important to ensure you have taken all the steps needed to send DPI correct data.

## Final Tasks: Final Days

Final Days Prior to Snapshot

* Double check that your errors and warnings are resolved. Even though all errors may be resolved at one point, check daily in the time before the snapshot-- changes other agencies make may change your data!
* Double check that you have enrollment for all schools and in all grade levels in WISEdata for both the current year and the prior year.

## Final Tasks: ‘Watch For’

* Some common issues include:
* Economic Disadvantaged status
* TFS & Oct. 1 Count Inclusion status
* ELL status
* SSEPA record end dates

## Final Tasks: Snapshot Help Docs

* [**WISEdata Annual Tasks Checklist webpage**](https://dpi.wi.gov/wisedata/schools/annual-tasks-checklist): An organized checklist of items that need to be completed for WISEdata reporting annually.
* [**Knowledge Base Articles (KBAs)**](https://dpidynamicsprd.powerappsportals.com/articles-search-page/): Useful articles on validations and other related topic
* [**Mini Tutorials**](https://dpi.wi.gov/wisedata/help/mini-tutorials): Cover a variety of topics you may have questions on
* [**Snapshot Preparation Guidance webpage**](https://dpi.wi.gov/wisedata/schools/snapshot-prep): Provides in-depth guidance on snapshot information

## Final Tasks: Getting Help

* Notifications from the DPI Customer Services Team
* ~6-8 weeks before snapshot DPI will begin program area data quality checks and may find specific issues to reach out to you on.
* Review Data Quality alerts in WISEdata Portal
* Help Tickets
* [**Create a Help Ticket**](https://dpi.wi.gov/wisedash/help/ticket), so the DPI Customer Services Team can help you resolve issues, including those that may be vendor related.

## Post Snapshot: Data Errata Letters

* Once the snapshot is taken the data in the WISEdash database *cannot be changed*.
* Data errors after snapshot are addressed with a Data Errata Letter submitted via the WISEadmin Portal.
* Remember: no PII!
* WISEdash Public Portal now provides higher visibility for Data Errata.
* The most common issues are enrollment, for example Oct. 1 and TFS counts, or demographics therein (SPED, ELL, Econ Disadvantaged, etc.).
* More info: [**https://dpi.wi.gov/cst/data-collections/data-errata**](https://dpi.wi.gov/cst/data-collections/data-errata)

## Data Privacy

* Data Privacy Resources
* Select Data Privacy from [**http://dpi.wi.gov/wise/data-privacy**](https://dpi.wi.gov/wise/data-privacy)
* Data privacy is of the utmost priority to us, and we take it very seriously.

## More Helpful Resources

* [**WISEdata Flyer**](https://dpi.wi.gov/sites/default/files/imce/wise/WISEdata_flyer_3_WEB.pdf):  High level overview describing how WISEdata has improved our data collection process, data quality, and system integration.
* [**Info for Schools**](https://dpi.wi.gov/wisedata/schools): Basics of getting started with WISEdata.
* [**WISEdata Help**](https://dpi.wi.gov/wisedata/help): Links to WISE help pages and useful resources.
* [**Data Elements**](https://dpi.wi.gov/wise/data-elements): List of links to all WISEdata data elements and their descriptions, uses, and codes.
* [**Google Spaces**](https://mail.google.com/chat/u/0/?zx=4288z3h5xzhd): WISEdata community to view and post questions and comments to fellow users.
* Please submit a Help Ticket if you would like to join Google Spaces.

## Help Ticket

* [Help Ticket](https://dpi.wi.gov/wisedata/help/request)

***IMAGE*:** Screenshot of the WISE Help Ticket.

## Giving Feedback

* Within most DPI applications you can:
* Provide feedback directly.
* Enter a new suggestion.
* Vote on suggestions made by other people.
* [feedback.dpi.wi.gov](https://widpiprd.sharepoint.com/sites/O365CG-CustomerService/DocLibDocumentationExternalFacing/Training%20Materials/Snapshot%20Prep/feedback.dpi.wi.gov)

## Thank You!

* Thanks for all that you do!

## Questions

* Link to Q&A document



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