School and Child Care Immunization Module Roster Upload

Quick Reference Guide

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About Roster Uploads

Roster uploads update student demographic data for Schools or Child Cares within the School and Child Care Immunization Module (SCCIM). Provided that the roster file submitted contains accurate data, an upload can remove students who have left a school or child care, add new students who may have just started, and change students' grades. The roster file is created from your Student Information System and includes only demographic information. If you do not have a Student Information System, you must create the roster document by hand. The SCCIM Team reviews roster files to ensure they are properly formatted so an upload is successful. The SCCIM Team will reach out to users if there are any issues they can't fix so that users can resubmit a new file for upload.

When to Do a Roster Upload

The SCCIM Team offers an initial roster upload when a School District, Private School or Child Care begins using the Module. After that, we offer once-monthly roster uploads. Users have the option to update their rosters by hand instead of completing a roster upload. This means you will be adding and removing students when they start at or leave a school/facility, as well as updating students grades on your end. Because of this, roster uploads are optional and are not required. There is no requirement for how frequently roster uploads should be completed. Some smaller School Districts, Private Schools and Child Cares only upload a roster a couple of times a year or not at all. We encourage a roster upload at minimum at the beginning of the school year before the reporting deadline and at the end of the school year. **We can only do one roster upload per month per school district/private school/child care.**

How Long is the Roster Upload Process?

After the initial roster upload, the old roster must be removed/cleared from the system before uploading the new roster. You can ask the SCCIM Team to remove your roster or you can do this yourself by following the "How to clear the old roster" directions on the following page. The size of your roster impacts the time the system takes to complete the upload; larger rosters take longer than smaller rosters. Rosters are generally uploaded in the order in which they are received. Please allow 3 business days for rosters to be uploaded. During the beginning and end of the school year when the SCCIM Team receives the largest amount of data, please allow for a potentially longer upload timeframe.

How to Create a Roster

Roster uploads are done for a whole School District, Private School, or Child Care at one time. This means if you have a group of Child Cares or Private Schools, all students at each facility/campus should be listed on one roster document together. You must ensure that students on your roster have the correct corresponding school code for the school/campus they attend. The roster file will include all the students attending all the different locations your program/district covers. One user from each District, Private School or Child Care should oversee creating and submitting the roster.

For security reasons, we cannot accept rosters via email; they **must** be sent in via secure our WAIIS School and Child Care Immunization (SCCI) Wizard.

The rosters must be a Microsoft Excel document saved as a Comma Separated Values (.csv) file. Other file types will not successfully upload into WAIIS and cannot be accepted.

Instructions for how to create your roster file by student information system are included in this guide. There are also instructions for manually creating your roster file if you use another student information system or if your facility doesn't have one at all.

All rosters must include legal names only. WAIIS holds medical records used by school nurses, school and child care staff, medical providers, and others across the state. Many of the medical records within WAIIS were created at birth and will be used for the rest of the patients' lives. Using preferred names creates duplicate profiles within the system and can separate given vaccination records into multiple profiles. This makes records incorrectly appear incomplete.

We do have an exception for students who are transgender or for those who are using a different name for legal reasons such as protection orders or custody matters. For these students' records, we are able to add preferred names under the alias section of the patient demographic page. This allows you to search for a student using both their preferred and legal names. If you have a student who falls under one of these categories, please let us know through the WAIIS School and Child Care Immunization (SCCI) Wizard.

How to Clear the Old Roster

You must be in a School District Client account that allows access to all the Schools/ Child Cares in your District/ Program or have a nurse/staff member at each location follow the below steps to clear their own roster.

To clear the rosters:

1. Log in.
2. Select “Click to Select” and a new window will pop up.
3. Select “Search” in the new window to open a list of all the schools.
4. Select the arrow next to the school whose roster you wish to clear.
5. Select “Continue”.
6. Under the “Schools” tab on the left side of the page, select “Roster”.
7. Select the series.
    a. If you are clearing a K-12 school, choose the series as Grades K-6 (this will always show all the students).
    b. If you are clearing a childcare roster, please select the series that matches the grades attending this facility.
8. Once the roster opens and has loaded all the students, scroll to the bottom of the page and select the “Select All” button.
9. Select the “Save Roster Updates” button. You should then see that all the students were removed from the roster.
10. Repeat steps for all the schools/locations in your District or Program.
11. Once all rosters are clear, you can submit your new roster for upload via our WAIIS SCCIM Roster File Upload. We are automatically notified by REDCap when a roster file is submitted.
12. You will receive an automated email when the roster upload is complete.

Roster Upload Steps for Skyward SMS

Pull your students demographic information from Skyward SMS. There is a built-in report in Skyward SMS for the School and Child Care Immunization Module. We recommend that you run the Skyward template so there is no need to add or create your own. This will create a file for export. This report can be run from any entity and will extract data for all the schools in your district. All student names within the roster must be legal names, not preferred names.

1. The report is: **"Department of Health Student Directory". This report is ONLY at 000 - Office/Health/Vaccinations/Reports/Washington State Reports/Department of Health Student Directory.** If you do not have this report, please reach out to your Skyward representative to gain access**.**
2. Open the export file under the *View/Save Locally Department of Health Student Directory* (listed right under the report). Click *view* and the roster will open into an Excel file.
3. Save this as an Excel *.csv file. The file name should be the name of your District/School/Child Care.
4. Upload it here: WAIIS SCCIM Roster File Upload. Please be sure to fill in all the required fields of the questionnaire. Once your roster has been uploaded, make sure you select the "**Submit**" button at this bottom of the page.
5. You will receive an automated email letting you know your roster has been received.
6. You will receive an automated email letting you know when the roster has been successfully uploaded.

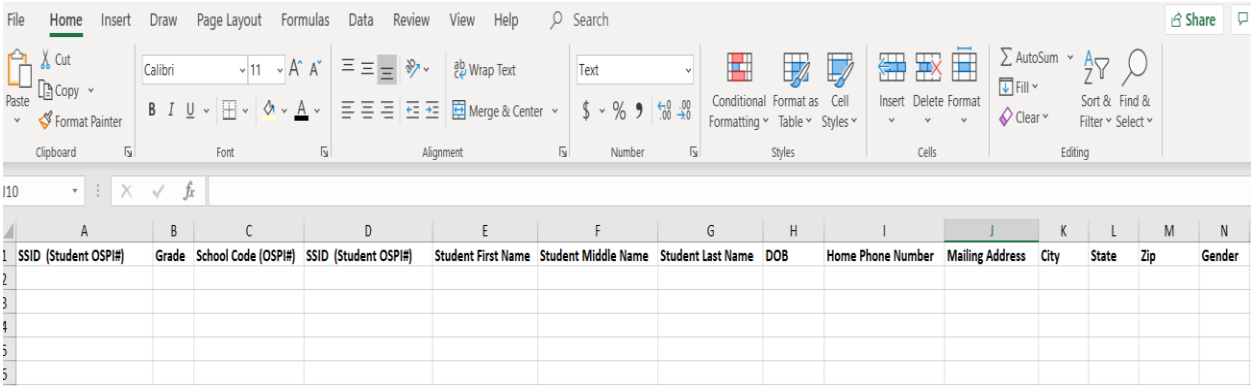
Roster Upload Steps for Skyward Qmlativ

Pull your students' information from Skyward Qmlativ. There is a built-in report in Skyward Qmlativ for the School and Child Care Immunization Module. Our recommendation is that you run the Skyward template (no need to add or create your own). This report can be run from any entity and will extract data for all the schools in your district.

1. The report is "**Administrative Access > State Reporting > Reports: DOH Student Directory**" If you do not have this report, please reach out to your Skyward representative to gain access.
2. Download the results and make sure they are saved as an Excel *.csv file. The document should be saved with the name of your District/School/Child Care.
3. Upload it here: WAIIS SCCIM Roster File Upload and please be sure to fill in all the required fields on the questionnaire. Once your roster has been uploaded, make sure you select the "**Submit**" button at this bottom of the page.
4. You will receive an automated email letting you know your roster has been received.
5. You will receive an automated email letting you know when the roster has been successfully uploaded.

Roster Upload Steps for Other or No Student Information Systems

The screenshot below is what the roster file should look like:



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	SSID (Student OSPI#)	Grade	School Code (OSPI#)	SSID (Student OSPI#)	Student First Name	Student Middle Name	Student Last Name	DOB	Home Phone Number	Mailing Address	City	State	Zip	Gender
2														
3														
4														
5														
6														

ALL columns must be present in the file even if cells within those columns are left blank. This ensures that data maps into the correct places during the upload. Missing columns prevents file uploads.

Required fields – data in these columns must be properly formatted and cells cannot be left blank, otherwise students won't be uploaded.

Non-required fields – data in these columns is optional and cells can be left blank; any data you do put in these columns must be formatted properly, otherwise those students won't be uploaded.

Column Index:

A. Student SSID number. ***This is a required field.***
   i. For schools, SSID Numbers should be the OSPI number assigned when the student was registered for school within the State of Washington.
   ii. If you do not have OSPI numbers or your roster is not for a school, then any unique ID number works for each child.

B. Grade. ***This is a required field.***
   i. Please ensure student grades are correct prior to submitting your roster file.
   ii. Accepted grade options are:
      - P, P0, P1, P2, P3, P4 or P5 = Preschool. Some schools only use P whereas others use P0-P5 to distinguish between groups. It is up to you how this is done.
      - TK = Transitional Kindergarten (or Pre-K).
      - K = Kindergarten
      - 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, or 12 = grades 1 through 12. Do not put 0s in front of the numbers. Do not write out "grade" before the number.

C. School Code. ***This is a required field.***
   iii. For Schools, be sure to use the OSPI assigned school code. You can look up the OSPI schools codes here: Office of Superintendent of Public Instruction (ospi.k12.wa.us).
   iv. For Child Cares/ECEAPS or, if your School does not have an OSPI assigned School Code, then please reach out through the WAIIS School and Child Care Immunization (SCCI) Request Wizard and inform us we need to assign a school code and provide it to you.

D. Student SSID number. ***This is a required field.*** *It should be the same as Column A.*

E. Student First Name. ***This is a required field.*** **Please see the note below about student names.*

i. DON'T include special characters such as question marks "?", exclamation points "!", underscores "_" or the @ symbol.

F. Student Middle Name. *This field is optional. *Please see the note below about student names.*

G. Student Last Name. ***This is a required field.*** **Please see the note below about student names.*

H. DOB (Date of Birth). ***This is a required field.*** Format as: MM/DD/YYYY.

I. Home Phone Number. *This field is optional.*

i. If you list phone numbers, they can only contain numbers, no dashes: 9999999999

J. Mailing Address. *This field is optional but very helpful to have.*

i. Having this information helps the WAIIS identify matches during the duplication process.

ii. Not having it on a roster file creates added manual work for the Department of Health to identify duplicate records.

iii. Lacking address information increases the likelihood of a bad merge because without it, isn't enough information to differentiate records or identify matching records.

K. City. *This field is optional.*

L. State. *This field is optional.*

i. If you do put the state, it must only be the 2-letter abbreviations such as WA or OR.

ii. If a student has an address in a foreign country, please leave the state field blank.

M. Zip. *This field is optional.*

v. If you do put the zip code, it should only be 5 digits long with numbers only.

N. Gender. ***This is a required field.***

vi. F for Female

vii. M for Male

viii. U for unknown/other

Note about student names

Please make sure that you provide students/children's legal names as they appear on their birth certificate. We only allow the use of a preferred name if a student/child is transgendered or undergoes a name change due to legal reasons such as protection orders and child custody matters. Please let us know if this applies to anyone on your roster and we can change their name within the system on your behalf.

2. Save this as a Microsoft Excel Comma Separated Values (.csv) file. **Other file formats such as PDFs and regular worksheets (.xlsx files) cannot be uploaded.** Please include the name of the school district/private school/child care and date of submission so we know where the roster is from and when it was submitted.

3. Upload your roster file here: WAIIS SCCIM Roster File Upload and be sure to fill in all the required fields on the questionnaire. Once your roster has been uploaded, make sure you select the "**Submit**" button at this bottom of the page.

- If this is your organization's first roster upload OR if you want to clear the rosters yourself, select the bubble next to the option, "No, don't clear the rosters. We will clear the roster or remove withdrawn students ourselves."
- If this is not your first roster upload OR you would like us to remove the old roster for you, please select the bubble next to: "Yes, please clear the rosters."

4. You will receive an automated email letting you know your roster has been received.

5. You will receive an automated email letting you know when the roster has been successfully uploaded or if there are any issues with it.