School Module Roster Upload

Quick Reference Guide

Roster Uploads

A roster upload is a quick way to update student rosters within the School Module. It will remove any students who have left a school, add any new students who may have just started, and change students' grades as needed. The roster upload is created from your Student Information System and includes only demographic information.

When to do a roster upload

We offer a roster upload when a School, District or Childcare begins using the School Module. After that, we offer once monthly roster uploads.

Users have the option to update their rosters by hand, adding and removing students when they start or leave school so that they do not have to go through the roster upload process if they do not want to.

If your District, School or Childcare does not have a lot of turn-over you can upload the roster only as needed if it's less than once a month. Some smaller Districts, Schools and Childcares only upload a roster a couple of times a year.

Historically, we have offered only one roster upload a month per Private School or District. Due to increased demand, we are now offering two roster uploads a month only for those School or Districts that clear their rosters by hand prior to sending us a new roster. For instructions on how to do this please see the below section labeled, "**How to Clear the Old Roster**".

How to create a roster

Roster uploads are done for a whole District at one time. The roster file will include all the students attending all the different schools within the district. One user from each District, School or Childcare should oversee creating the roster and sending it in to us. We cannot accept rosters via email for security reasons so they will need to be sent via our RedCap survey link.

The rosters will need to be a Microsoft Excel document saved as a CSV. File. Instructions for how to create your roster file are listed below and are determined by which student information system you use. Skyward has set up a report that allows users to pull the needed student demographic information directly from it.

All rosters need to include only legal names. The IIS holds medical records used by school nurses, school staff, providers, and others across the state. Many of the medical records within the IIS were created at birth and will be used lifelong. Using preferred names creates duplicate profiles within the system and can separate given vaccination records into multiple profiles. This makes records appear incomplete.

We do have the exception of allowing preferred names for students who are transgender or those who are using a different name for legal reasons such as protection orders or custody matters. If you have a student who falls under one of these categories, please reach out to us at schoolmodule@doh.wa.gov and we can update their name within the IIS on your behalf. There is also the option to add preferred names into the system under the alias section of the patient demographic page. This allows you to search for a student using both their preferred name and legal name.

How long does the roster upload process take?

After the initial roster upload, we will have to remove the old roster from the system before uploading the new roster. To remove the old rosters, we put in a ticket request with the School Module software company. They then clear the old rosters on the following Wednesday night during the system weekly maintenance window. The following Thursday, we will be able to upload the new roster into the system. We complete rosters uploads in the order received. If there were multiple roster upload requests sent in prior to yours, then your roster may temporarily appear blank we upload the others.

The time a roster upload takes to complete depends on the size of your roster. Larger rosters take longer than smaller rosters. Before the roster upload is complete, the system will do a check for duplicate records. This usually takes about an hour to complete and will help with students having multiple profiles within the system.

How to Clear the old roster

If you do not want to wait until the following Thursday for your roster to be uploaded, you can go in and remove the old rosters from the School Module yourself. Or, if you would like to complete two roster uploads a month, please follow the instructions below. Please note, we only offer twice monthly roster uploads to Schools and Districts that clear their old rosters themselves, by hand. All others, who wish to have their old rosters cleared during the systems weekly maintenance window on Wednesday nights will only be allotted one roster upload per month. All the rosters for every school in your District need to be cleared.

You will need to be in a School District Client account that allows access to all the Schools in your District or have a nurse at each school follow the below steps to clear their own roster.

To clear the rosters, please follow these instructions:

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. Next, select the series. If you are clearing a K-12 school, choose the series as Grades K-6 (this will always show all the students). 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.
   a. *Important note: If your roster has over 1000 students, you will need to remove students by grade, not all at one time. To do this, select a grade prior to running your roster so that the total students shown on the roster is less than 1000. The system does not permit removing more than 1000 students from a roster at one time.*
10. Repeat steps for all the schools in your District.
11. Once done, and you have submitted a new roster for upload please reach out to us at schoolmodule@doh.wa.gov and we will upload the new roster into the system. You can see additional instructions for this process on page 6 of our Training Guide linked here: School Module Training Guide (wa.gov)

***Do not clear your rosters on the last Tuesday or Wednesday of the month or, the week of the Annual Immunization Reporting deadline. During this time our Epidemiologist team runs reports that require all rosters be full.

Roster Upload Steps for Skyward SMS

Pull your students information from Skyward SMS. There is a built-in report in Skyward SMS for the School 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 need to 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.**

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

4. Upload it here: WAIIS School Module 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. Once your roster has been uploaded into the School Module you will receive an automated email letting you know you can now access the rosters on your end.

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 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**"
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.
3. Upload it here: WAIIS School Module 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. Once your roster has been uploaded into the School Module, you will receive an automated email letting you know you can now access the rosters on your end.

Roster Upload Steps for all Student Information Systems except Skyward SMS and Qmlativ

1. View the below screenshot example of what the roster should look like.
This is the format you will need to follow in order to match patients in the system with students at your school. The document needs to be an Excel file saved in .CSV Comma Delimited Version. There should only be one document with all the students from all the schools listed together. It is important to keep the columns in the same order as shown in the below roster template image.

a. Student SSID numbers are entered twice. SSID Numbers should be the OSPI number assigned when the student was registered for school within the State of Washington. If you do not have OSPI numbers, then any student ID number works if it's unique for each person.

b. Under School Code, 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). If your School or Facility does not have an OSPI assigned School Code, then please email us at Schoolmodule@doh.wa.gov and we will assign you a code.

c. Please make sure that you provide students legal names as they appear on their birth certificate. We only allow the use of a preferred name if there is a situation where a

student's name has been changed for legal reasons such as protection orders, child custody matters, or if a student identifies as transgender. Please let us know if you have any student this applies for, and we can change their name within the system on your behalf.

 d. Under the grade column, if applicable, Preschool should be listed a "P, P0, P1, P2, P3, P4, and P5", Kindergarten needs to be listed as "K", transitional Kindergarten should be listed as "TK".

 e. All grades should be listed as 1, 2, 3, 4 etc. without any 0's in front of the grade number and should not include the word grade before the number.

 f. Dates of birth should be entered in the format MM/DD/YYYY.

 g. Phone numbers should not include any special characters such as dashes "–".

 h. Zip codes should only be 5 digits long, with no letters or special characters.

 i. Genders should be listed as "F" for Female, "M" for Male and "U" for Unknown/Other. Do not leave this field blank.

2. Save this as an excel *.csv file. The file name should be the name of your District.

3. Upload it here: WAIIS School Module 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. Once your roster has been uploaded into the School Module, you will receive an automated email letting you know you can now access the rosters on your end.

Roster Upload Example: