

School and Child Care Immunization Module Roster Upload

Quick Reference Guide

Roster Uploads

A roster upload is a quick way to update rosters for Schools or Child Care within the School and Child Care Immunization Module. It will remove any students who have left a school or child care, 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. If you do not have a Student Information System you will need to create the roster document by hand.

When to do a roster upload

We offer a roster upload when a School, District or Child Care begins using the Module. After that, we offer once monthly roster uploads for those who have us clear the old roster or, bi-monthly uploads for those who clear their old rosters themselves.

Users have the option to update their rosters by hand instead of completing a roster upload. This means, as the user, you will be adding and removing students when they start or leave a school or facility and 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 need to be complete. You can upload rosters only as needed if it is bi-monthly or less. Some smaller Districts, Schools and Child cares often 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.

How to create a roster

Roster uploads are done for a whole District, School, or Child Care at one time. This means if you have a group of Child Care or schools all students at each facility should be listed on one roster document together. The roster file will include all the students attending all the different locations your program/district covers. One user from each District, School or Child care should oversee creating the roster and sending it in.

For security reasons, we cannot accept rosters via email, they will need to be sent in via secure 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



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directly from it. If you do not use a student information system, please use the last set of instructions below to create your roster.

All rosters need to include only legal names. WAIS 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 WAIS 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 when they are not.

We have the exception of allowing preferred names for students who are transgender or, for 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, the old roster must be removed from the system before uploading the new roster. Removing the old rosters can be done in one of two ways. We can remove it for you by putting in a ticket request with our software vendor. They then clear the old rosters on the following Wednesday night during the system weekly maintenance window. The next day, Thursday, we will upload the new roster on your behalf. Please note, we complete rosters uploads in the order the roster documents were received. If there were multiple roster upload requests sent in prior to yours, then your roster may temporarily appear blank as we upload the others.

The second option is for you to clear the old roster on your end before you send us the new roster. For complete steps on how to do this, please see the instructions below under the headline, "How to Clear the old roster". You can choose to just remove individual students as they leave the school or child care so that you don't have to remove all the students from a roster at one time. Clearing the roster on your end before submitting your new roster allows us to upload the new roster as soon as it is received. You do not have to wait until the following Thursday to get your roster uploaded like you would if you had us clear the rosters for you. Additionally, for those that clear their own rosters, we offer an extra roster upload each month, two total.

The size of your roster impacts the time the system takes to complete the upload. Larger rosters take longer than smaller rosters.

How to clear the old roster

If you do not want to wait until the following Thursday for your roster to be uploaded or, if you would like to complete two roster uploads a month you can go in and remove the old rosters yourself. Please note, we only offer twice monthly roster uploads to those that clear their old rosters themselves. All others who wish to have their old rosters cleared during the system's weekly maintenance window on



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Wednesday nights will only be allotted one roster upload per month. All the rosters for every school in your District or Child Care in your program need to be cleared. Please follow the steps below to do so:

You will need to be in a School District Client account that allows access to all the Schools/ Child Care 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, 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/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 will receive an automated email letting us know it has been submitted. We will then upload the roster.
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 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**



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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: [WAIS 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: [WAIS 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 all Student Information Systems except Skyward SMS and Qmlativ or, if you do not have a Student Information System

1. View the below screenshot example of what the roster should look like. This is the format you will need to follow to match patients in the system with students/children at your school or facility. There should only be one document with all the students from all the schools/locations 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.



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- a. For schools, SSID Numbers should be the OSPI number assigned when the student was registered for school within the State of Washington.
 - b. 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. School Code,
- a. 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 \(ospi.k12.wa.us\)](http://ospi.k12.wa.us).
 - b. For Child Cares/ECEAPS or, if your School does not have an OSPI assigned School Code, then please email us at Schoolmodule@doh.wa.gov and we will assign you a code to use.
- c. 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 there is a situation where a student's/child's name has been changed for legal reasons such as protection orders, child custody matters, or if they are transgender. Please let us know if this applies to anyone on your roster, 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". 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.
- e. Dates of birth should be entered in the format MM/DD/YYYY.
- f. Phone numbers should not include any special characters such as dashes "--".
- g. Zip codes should only be 5 digits long, with no letters or special characters.
- h. Genders should be listed as "F" for Female, "M" for Male and "U" for Unknown/Other. This is a required field. Do not leave this field blank or we will have to send it back to you to get the information added.

2. Save this as an excel *.csv file. The file name should be the name of your District, School, or Child Care.

3. Upload it here: [WAIS SCCIM Roster File Upload](#), 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 first roster upload 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 and you would like us to remove the old roster for you, please select the bubble next to: "Yes, please clear the rosters."



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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 Example:

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



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