

## An Introduction to Online District Registration Student File Scrubbing & Importing

**Goal:** To achieve client independence for ODR Student File scrubbing & importing.

### What you will need:

1. PIMS Student File from each sending district, plus additional fields (use the ClassMate template which has all the PIMS fields and the additional fields in one template)
2. Access to the following ClassMate module(s)
  - a. Student Applications > New Student Import/Entry
  - b. Base Data Information > Sending School Management
  - c. Base Data Information > City Maintenance
3. The chart below to help you understand ClassMate REQUIRED fields in the template, valid values for each field, along with some tips.

### How to scrub a STUDENT file in preparation for import and usage with Online District Registration (using the District Portal):

1. Verify that you are using the correct template. The proper template for the state of PA which can be located on the ClassMate website > Documentation > ClassMate User Documentation > State Specific Documentation page
2. Review the fields in the template to verify that they are in proper format and that data appears in the required fields by using the Definitions tab in the Template.
3. Use the table below to understand what fields are required, the valid values for the field and some helpful tips.
4. REMEMBER before importing you must REMOVE the Definitions tab from the template or it will not import.

Optional/Required	Column #	Field Name	Definition	Helpful Tips / Valid Values
Required	A/1	District Code	Unique 9 digit AUN assigned by PDE	Verify this code matches what is in CM.
Required	B/2	Location Code	Unique 4 digit school code, PDE defined	Verify this code matches what is in CM. If this does not match, change what is on the import template.
Required	D/4	Student ID	Unique 10 digit PA Secure ID	
Required	J/10	Current Grade Level	Indication of student's current grade level	
Required	N/14	Birth Date	Student Birth Date	<b>Format: YYYY-MM-DD</b>
Required	O/15	Gender Code	Provide a code that represents gender of student	M-Male F-Female
Required	P/16	Address 1	Street name and number of mailing address	You may wish to use a "Proper" function in excel to rid of all caps.
Required	R/18	City	City of students mailing address. Provide the name.	Verify that all cities exist in City Maintenance module in CM.
Required	S/19	State Code	2 digit official character of US Postal Service abbreviation for students mailing address	
Required	T/20	Full Zip Code	5 or 9 digit official character of US Postal Service.	<b>Format: NNNNN or NNNNN-NNNN</b>
Required	AA/27	Race / Ethnicity Code	Single code indicating the race/ethnicity of student	<ul style="list-style-type: none"> <li>• 1 – American Indian/Alaskan Native (not Hispanic),</li> <li>• 3 – Black or African American (not Hispanic),</li> <li>• 4 – Hispanic (any race),</li> <li>• 5 – White (not Hispanic),</li> <li>• 6 – Multi-Racial (not Hispanic),</li> <li>• 9 – Asian (not Hispanic),</li> <li>• 10 – Native Hawaiian or other Pacific Islander (not Hispanic)</li> </ul>
Required	EC/133	Last Name Long	The legal last name (surname) of the student	You may wish to use a "Proper" function in excel to rid of all caps.
Required	ED/134	First Name Long	The legal first name of the student	You may wish to use a "Proper" function in excel to rid of all caps.

## Excel Functions to help with data consistency and proper formatting:

- 1. Proper Case**
  - a. Purpose: Converts a text string to proper case; the first letter in each word in uppercase, and all other letters to lowercase
  - b. Example: turn JOHN SMITH into John Smith
- 2. Concatenate**
  - a. Purpose: Joins several text strings into one string
  - b. Example: turn John in a cell and Smith in another cell to form John Smith (combined) in a cell.
- 3. Trim**
  - a. Purpose: Removes all spaces from a text string except for single spaces between words
  - b. Example: If you click on a cell and there is a last name there, Smith, followed by 10 spaces, use the Trim function to remove all the spaces.
- 4. Substitute**
  - a. Purpose: Replaces existing text with new text in a text string
  - b. Example: turn 855-984-1228 into 8559841228
  - c. Tip: when filling in the function, use "" (2 double quotes, no space) to eliminate the space
- 5. Left**
  - a. Purpose: Returns the specified number of characters from the start of a text string
  - b. Example: Turn a middle name into a middle initial, Marie → M. This would be doing a left function returning only 1 character from the start of the string.
- 6. Mid**
  - a. Purpose: Returns the characters from the middle of a text string, given a starting position and length.
  - b. Example: If you have a phone number with ( ) or -, pick out the middle 3 numbers of a phone number (855)984-1228, so 984. This would be doing a mid function, returning 3 characters from the 6<sup>th</sup> character. 9 of the 984 is the 6<sup>th</sup> character from the start of the string (,8,5,5,).
- 7. Right**
  - a. Purpose: Returns the specific number of characters from the end of a text string
  - b. Example: Get the last 4 digits of a Social Security number. This would be doing a right function and returning 4 digits from the end of a string.

NOTE: You must use VALUES in the templates, not formulas. So, when you click on a cell, it must read exactly as the cell displays. It should not read for example [=CONCATENATE(D3,E3)] as that is a formula. To fix this: after you have used a function to get data as you want it, Add a column next to the column your formula is in, click on the cell that has the formula, copy, then right click and PASTE VALUES into the new column. You will want to drag down the results so it applies to all the rows. Remove any unnecessary columns afterwards.

## How to Import a STUDENT file (this is the data that will populate your Online District Registration New Students table):

**Note: The student file must be imported PRIOR to the Student Contact file (both files NEED to have the Definitions tab removed before uploading)**

1. In ClassMate, open the module Student Application > New Student Import Entry
2. On the Application Import tab (first tab), browse to find the location of your saved file
  - a. If the file is on your local computer, browse to the C\$ on 'Client' (V:), which will bring you to your local computer and you can drill down to find the file (ex: Users > 'your computer login' > desktop > 'file name').
3. Click the Blue Right Triangle button on top toolbar
4. The process runs .... loading/importing the students. If you get an error, DO NOT CONTINUE. Contact the helpdesk for support. You will need to wipe clean that district data and start over (the file imports up until the error, then stops).
5. Generate and Review the ODR Import Issues report to view any information that imported as a "blank" or that did not import at all (located under Reports > Student Applications)
  - a. This report will also provide you instructions on updating information or you can re-import entirely
6. Verify successful import:
  - a. Click the Application Entry tab
  - b. Select the District & School you just imported (or one of them if your file had multiple)
  - c. Verify the students appear in the list, select some students & spot check information. Remember, missing information in the file means missing information in the module.
7. The students that appear in this module will now appear on the ODR Portal under New Students!

## Frequently Asked Questions:

Question: Can we upload more than 1 file or does the import have to be 1 file that contains all districts data?

Answer: You can do as many file uploads as you want. You can even import a file that you already uploaded, if a file contains students that you have already uploaded, any information that is DIFFERENT than the prior file will be updated.

Question: I cannot gather the District Student ID's from my districts, will that cause any errors?

Answer: As of March 2016, you no longer are required to have the District Student ID, the only required Student ID field is the PA Secure ID.

Question: I just did an import, but only 3 students are appearing in the Portal as New Students (and in New Student Import/Entry module, only 3 students display here).

Answer: This is because all the students but 3 are students that are already in ClassMate

Question: One of my students that was in the East Willow District import file moved districts within the last week or so. Do I need to upload a new file for just that 1 student so they appear in the correct district now?

Answer: No. You can change a student's district/school using the ClassMate Module: Student Applications > New Student Import/Entry module > Application Entry tab. First select the district and school that the student was in, select the student, then update the Attending District and Attending School, save. This will move the student to display under the newly updated District/School views.

Question: Do I have to use an import file to enter a new student in the portal, or is there a manual entry I can do?

Answer: There is a manual entry option, using ClassMate Module: Student Applications > New Student Import/Entry module > Application Entry tab. You must first select the district and school that the student attends, then enter a State Secure ID, First Name, Last Name. You must also fill in all required information under the Student Information tab. It is a best practice to fill in all information available at this time for the Student Information tab, Additional Information tab and/or Contacts tab.

Answer: If district counselors want to be able to enter New students into the Portal, they have an option now with the new "Manual Entry Form" feature. This allows them to fill out a form which will enter the student into the Portal so that they can register them. This way, the Counselor at the District does not have to notify the CTC that there is a new student in their district.

Question: If I have to make a minor change to a data field for a specific student, is there a place I can do this within the Portal or ClassMate without having to upload another file?

Answer: Yes, all the information that you see on the Portal is all populating from the information that is in the ClassMate Module: Student Applications > New Student Import/Entry module > Application Entry tab. If there is any information you need to update, you can use this module to do so.