SWIS Suite Person Import Specification: Staff and Student Data

Person Import allows any SWIS Suite school to import a list of students or staff from their Student Information System into the SWIS application. Importing these records will reduce the amount of time schools spend manually entering data already available in another system.

REQUIREMENTS

Users accessing the Person Import feature must have the authority within the account to use it. Only SWIS Admins, SWIS Facilitators, and SWIS Data Managers will be able to access the Person Import Feature for the SWIS account. Anyone who needs access will need to be designated as one of these roles by the SWIS facilitator.

Data

Schools' data must meet certain requirements to ensure a clean import of person records. These requirements have been developed to ensure that the import process occurs accurately and without creating duplicate records.

All schools utilizing Person Import must have:

- Student and staff district ids required in School Settings

- All active and inactive students and staff identified with a district id. (The process ignores archived students and staff.)

- All unique district ids. No two student records, no two staff records have the same district ids.

- The ability to generate a file matching the required format (see Import Files below).

Note: The Data Integrity system in the SWIS Suite will check for missing district ids as well as distinct district ids across person types.

School Setting: District Ids Required

Person Import uses student and staff district ids to match records in Person Management with the records imported from the data file. For this reason, the school preferences Require Staff District Ids and Require Student District Ids must be enabled.

Missing District Ids Must Be Entered

To ensure accuracy and avoid duplicate entries, all existing active or inactive students and staff must have a district id entered. Please note archived students and staff can be skipped as they are not included in the import process.

All District Ids Must Be Unique

All district id numbers must be unique within a given person record type (i.e. student, staff). A student and staff record may share an id number, but no two students and no two staff may have identical id numbers. To avoid data conflict, there can be no duplicate district ids on the student list and no duplicate ids on the staff list.

ENABLING PERSON IMPORT IN SWIS ACCOUNTS

1. Correct any of the data integrity errors identified in the Issues Preventing Import section. Once all data integrity errors are corrected, the sections will appear green with a checkmark.

2. Create the student or staff export from your student information system based on the technical specification. See Import Files section in this specification.

3. Go to https://sandbox.swis.org to import the roster(s) in your sandbox account. The sandbox is for testing purposes. It refreshes every night with data from your real SWIS account and gives you a secure place to test your import process. Use the sandbox account to test any new file prior to importing data into your real SWIS account.

4. Follow the Person Import Wizard to upload the file to your sandbox account. *Note: The file uploaded to the sandbox must contain 20 or more records.*

5. Once the test file uploads successfully, log into your live SWIS account and navigate back to the Person Import section. It may take as long as 15 minutes for the live site to register your successful sandbox upload.

6. Click the Enable Person Import button in the notification located at the top left corner of this screen.

7. Follow the Person Import Wizard to upload the tested roster to your live account.

IMPORT FILES

The Person Import process currently supports Comma Separated Value (CSV) files for import.

Standard CSV rules apply:

- The first row will be interpreted as a header defining the ordering of your columns. This header row is mandatory.

- Fields containing a comma must be surrounded by double-quotes.

- Fields containing double-quotes must also be surrounded by double-quotes, with the internal double-quotes doubled. Example: Chevy "The Man" Chase would be included in the CSV as "Chevy ""The Man"" Chase".

All text should be UTF-8 encoded.

Student CSV Structure

A column header row is required. The column header row is used to identify the data present in each row. Columns without a name from the list below will be ignored.

Student CSV File Structure

Column Name	Required	Description
studentDistrictId	Y	The district id assigned to this student. string, must be unique
firstName	Y	The student's first name. string (all characters except commas allowed)
lastName	Y	The student's last name. string (all characters except commas allowed)
genderId	Y	The student's gender. See included list of gender identifiers
gradeId	Y	The student's current grade. See included list of grade identifiers

Column Name	Required	Description
hasIEP	N	Indicates if the student is on an IEP (individualized education plan). 1/Y/Yes or 0/N/No Empty is treated as a no
has504	N	Indicates if the student is on an 504 plan. 1/Y/Yes or 0/N/No Empty is treated as a no
Race	N	The student's race and ethnicity. See included list of race/ethnicity identifiers. This column takes multiple values delimited by either a space " "or a pipe "|". Examples: 1 3 4 1|3|4
Disability	N	The student's disability types. See included list of disability identifiers. This column takes multiple values delimited by either a space " "or a pipe "|". Examples: 1 3 4 1|3|4
Status	N	Indicates the status of the student's record. 1 (active), 2 (inactive), 3 (archived) Empty is treated as a 1 (active)
isHispanic	N	Indicates if the student is Hispanic/Latinx. If the student has been identified as Hispanic/Latinx in the "race" column, this column is ignored. 1/Y/Yes or 0/N/No Empty is ignored *Note: The data provided in the 'isHispanic' column is merged with data provided in the 'Race' column. If 'isHispanic' information is supplied and the 'Race' column is empty, the student is uploaded in Person Management as Hispanic/Latinx and all race information removed. To avoid this, provide data for both 'Race' and 'isHispanic' columns in the same data file.*
isLanguage-Learner	N	Indicates if the student is an English language learner. 1/Y/Yes or 0/N/No Empty is treated as a no.

EXAMPLES

Example 1

This example is a file with all required columns for a student import included.

Excel View:

studentDistrictId	firstName	lastName	genderId
12	Seth	May	1
22	Noah	Talmadge	1
32	Jon	Morris	1
42	Dylan	Bragg	1
52	Rob	Hoselton	1
62	Megan	Cave	2
72	Diertra	Lomeli	2

CSV View:

studentDistrictId,firstName,lastName,genderId

12,Seth,May,1

22,Noah,Talmadge,1

32,Jon,Morris,1

42,Dylan,Bragg,1

52,Rob,Hoselton,1

62,Megan,Cave,2

72,Diertra,Lomeli,2

Example 2

This example is a file with all possible columns included. Note: Since HasIep, Has504, GradeId, Race, Disability, Status, isHispanic, and isLanguageLearner are not required, some or all values can be empty. Take note of the delimited race and disability fields.

Excel View:

studentDistrictId	firstName	lastName	genderId	hasIep	has504	gradeId	race	disability	status	isHispanic	isLanguageLearner
12	Seth	May	1	0	0	1			1	1	
22	Noah	Talmadge	1	1		2	1	1	1	0	
32	Jon	Morris	1	1	0	3	1|2	1|2		1	1
42	Dylan	Bragg	1	1	0	4	1|2	1|2			
52	Rob	Hoselton	1	0	1	16	1|2|3	1|2|3			
62	Megan	Cave	2	0	1	14			2		
72	Diertra	Lomeli	2		0	13			2	0	
82	Mona	Miller	2			16			3	0	1

CSV View:

studentDistrictId,firstName,lastName,genderId,hasIep,has504,gradeId,race,disability,status,

isHispanic,isLanguageLearner

12,Seth,May,1,0,0,1,,1,1,

22,Noah,Talmadge,1,1,0,2,1,1,1,0,

32,Jon,Morris,1,1,1,3,1|2,1|2,,1,

42,Dylan,Bragg,1,1,1,4,1|2,4|6,,,

52,Rob,Hoselton,1,0,1,16,2|3,6|8,,,

62,Megan,Cave,2,0,0,14,,,2,,

Example 3

This example shows the use of alias values in the some of the columns (Gender, IEP, 504, and Grade). Also, the Race and Disability columns use optional delimiters (space or pipe (|)).

Excel View:

studentDistrictId	firstName	lastName	genderId	hasIep	has504	gradeId	race	disability
12	Seth	May	1	0	0	1		
22	Noah	Talmadge	1	1	0	2	1	7
32	Jon	Morris	1	Y	1	3	1|2	7|8
42	Dylan	Bragg	M	Yes	Y	4	1 2	8 9
52	Rob	Hoselton	Male	N	Yes	PKA	1 2 3	7 8 9
62	Megan	Cave	F	No	N	PK		
72	Diertra	Lomeli	Female		No	Post12		
82	Mona	Miller	2			PreKA		

CSV View:

studentDistrictId,firstName,lastName,genderId,hasIep,has504,gradeId,race,disability

12,Seth,May,1,0,0,1,,

22,Noah,Talmadge,1,1,0,2,1,7

32,Jon,Morris,1,Y,1,3,1|2,7|8

42,Dylan,Bragg,M,Yes,Y,4,1 2,8 9

52,Rob,Hoselton,Male,N,Yes,PKA,1 2 3,7 8 9

62,Megan,Cave,F,No,N,PK,,

72,Diertra,Lomeli,Female,,No,Post12,,

82,Mona,Miller,2,,,PreKA,,

STAFF CSV STRUCTURE

A column header row is required. The column header row is used to identify the data present in each row. Columns without a name from the list below will be ignored.

Staff CSV File Structure

Column Name	Required	Description
staffDistrictId	Y	The district id assigned to this staff person string, must be unique
firstName	Y	The staff first name string (all characters except commas allowed

Column Name	Required	Description
lastName	Y	The staff first name. string (all characters except commas allowed)
email	N	The staff email address string, must be unique
status	N	Indicates the status of the staff's record. 1 (active), 2 (inactive), 3 (archived) Empty is treated as a 1 (active)

EXAMPLES

Example 1

This example is a file with all required columns for a staff import included.

Excel View:

staffDistrictId	firstName	lastName
11	Seth	May
21	Noah	Talmadge
31	Jon	Morris
41	Dylan	Bragg
51	Rob	Hoselton

CSV View:

staffDistrictId,firstName,lastName

11,Seth,May

21,Noah,Talmadge

31,Jon,Morris

41,Dylan,Bragg

51,Rob,Hoselton

Example 2

This example is a file with all possible columns included. Note: Since email and status are not required, some or all values can be empty.

Excel View:

staffDistrictId	firstName	lastName	email	status
11	Seth	May	sethmay123@example.edu	
21	Noah	Talmadge		1
31	Jon	Morris	Jonmorris123@example.edu	1
41	Dylan	Bragg		2
51	Rob	Hoselton		3

CSV View:

staffDistrictId,firstName,lastName,email,status
11,Seth,May,sethmay123@example.edu,
21,Noah,Talmadge, ,1
31,Jon,Morris, jonmorris123@example.edu,1
41,Dylan,Bragg,,2
51,Rob,Hoselton,,3

CONFLICT HANDLING

Conflict: The person record in the import file already exists in Person Management (matching on the District Id)

Handling: The person record in Person Management (student or staff) is updated using the data found in the import file. The update replaces the following required data in Person Management (for updates to optional data, see the additional cases in this documentation):

For staff records:

- FirstName
- LastName

First Name, Last Name

		Data File	
		Has Value	No Value
Person Management	Has Value	Update from file	Not allowed*
	No Value	Update from file	Not allowed*

data file must have value

For student records:

- FirstName
- LastName
- GenderId

First Name, Last Name, Gender

		Data File	
		Has Value	No Value
Person Management	Has Value	Update from file	Not allowed*
	No Value	Update from file	Not allowed*

data file must have value

Conflict: The import file has an email address intending to update and existing staff record in Person Management which currently does not have an email address.

Handling: The staff record is updated with the email address included in the import file. Note: If the import file does not have an email value in it, no change is made to the existing staff record in Person Management.

Email

		Data File	
		Has Value	No Value
Person Management	Has Value	Update from file*	Keep Person Management value
	No Value	Update from file*	Do Nothing

For security reasons, if the person has a PBISApps account, the email is not updated. Only account owners may update their email address.

Conflict: The import file includes a new staff person to add whose email matches a different record's email address in Person Management

Handling: Email addresses are considered unique across the entire PBISApps system. Only one person may have any email address, independent of the school. To enforce this constraint the following occurs:

- The imported record's email address is checked against all existing email addresses in the sytem

- If an existing record is found to have the same email address:

    - The existing person record is added to the school importing the new record

    - The existing person record maintains its existing relationship with other organizations

    - The existing person record is updated with the imported data

Conflict: The import file has a value(s) intended to update an existing student record's Grade, IEP, 504, Race/Ethnicity, and/or Disability data

Handling: The student record in Person Management will be updated with the data included in the import file. Note: If the import file does not have value(s) for these optional fields, no change is made to the existing student record in Person Management.

Conflict: The 'isHispanic' value in the file is set to 'no' or '0' and the 'race' value in the file indicates the student is Hispanic/Latino.

Handling: In Person Management, the student record's Ethnicity field is updated with the information included in the file's 'race' value. The student record's Race field is set to no race. Note: This results in a Data Integrity error within the application. All students must have an ethnicity and a race assigned to their record.

Grade, IEP, 504, Race/Ethnicity, Student Disability

		Data File	
		Has Value	No Value
Person Management	Has Value	Update from file	Keep Person Management value
	No Value	Update from file	Do Nothing

APPENDIX: CLASSIFICATION SETS / LOOKUP LIST DEFINITIONS

The tables below contain the identifier and name for each value. Each table lists identifiers in numerical order.

Disabilities

Id	Name
1	Autism
2	Deaf-Blindness
3	Deafness
4	Emotional Disturbance
5	Hearing Impairment
6	Intellectual Disability
7	Multiple Disabilities
8	Orthopedic Impairment
9	Other Health Impairment
10	Specific Learning Disability
11	Speech or Language Impairment
12	Traumatic Brain Injury
13	Visual Impairment
14	Developmental Delay
15	To Be Obtained
16	Non-categorical

Races/Ethnicities

Id	Name
1	American Indian/Alaskan Native
2	Asian
3	Hispanic/Latinx
4	Black
5	White
8	Pacific Islander/Native Hawaiian

Genders

Id	Name	Abbreviation
1 / M / Male	Male	M
2 / F / Female	Female	F
3 / X / Other	Non-binary/Transgender/Other	X

Status

Id	Name
1	Active
2	Inactive
3	Archived

Grades

Id	Name	NCESGrade	Description
1	1	01	Grade 1
2	2	02	Grade 2
3	3	03	Grade 3
4	4	04	Grade 4
5	5	05	Grade 5
6	6	06	Grade 6
7	7	07	Grade 7
8	8	08	Grade 8
9	9	09	Grade 9
10	10	10	Grade 10
11	11	11	Grade 11
12	12	12	Grade 12
13 / P12	Post 12	NULL	Post Grade 12
14 / PK	Pre K	PK	Pre-Kindergarten
15 / K	K	KG	Kindergarten
16 / PKA	Pre K-A	PK	Pre-Kindergarten A – When multiple pre k grades exist, this is the earliest
17 / PKB	Pre K-B	PK	Pre-Kindergarten B – When multiple pre k grades exist, this is the second level