PUBLIC CONSULTING GROUP

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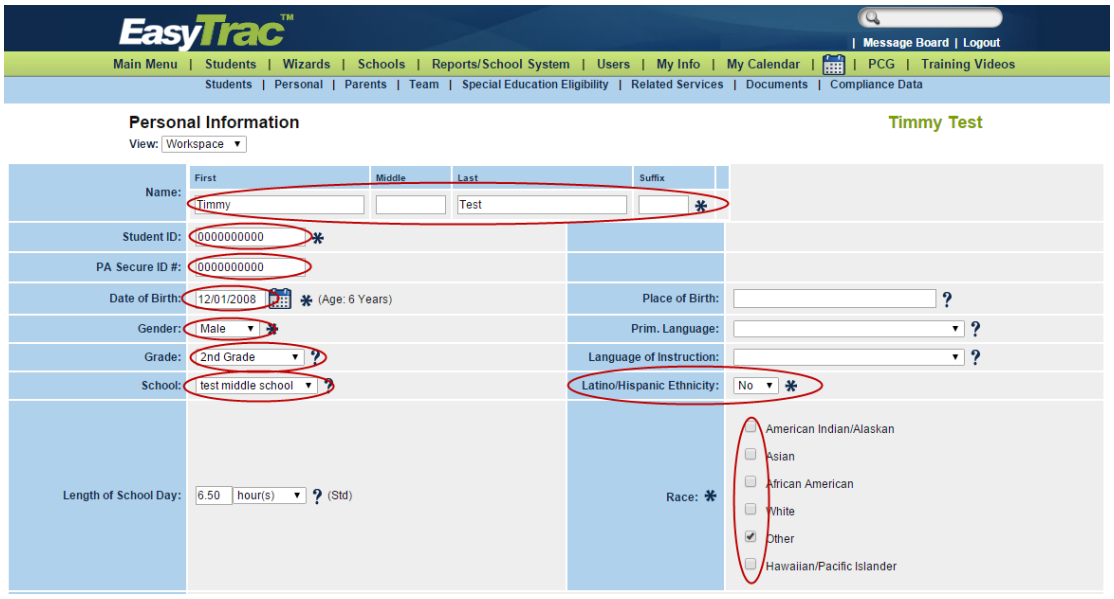
EasyTRAC™ Imports:
Student, Services, Users, Caseloads, and Service Logs

Introduction

This document is intended for ACCESS Coordinators and their corresponding SIS (Student Information System) package administrators or alternate service logging teams. ACCESS Coordinators are encouraged to share this document with their system administrators to develop the best way to provide the necessary elements to meet the EasyTRAC™ import specifications outlined in this document. ACCESS Coordinators and system administrators should review this document in conjunction with the applicable data exchange format to be used by the LEA.

Importing information directly in to EasyTrac™ reduces the need for double-entry of key demographic, school assignment, and grade on a regular basis. First and foremost, it saves time and resources. Importing SIS data history information into EasyTRAC™. This leads to more accurate and synchronized information between your local systems and EasyTRAC™.

For example, key fields that can be imported from an SIS package into EasyTRAC™ are circled here:



LEAs with large student populations and high levels of transiency are strongly encouraged to utilize the import functionality on a monthly basis, if not more frequently. SIS imports into EasyTRAC™ provide a straightforward, simple way to insure that student data integrity is maintained across multiple software systems while reducing duplicate data input effort.

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Required fields

There are nine fields that are required in the "Students" import to add a new student to EasyTRAC™: *District Code, Student Code, State Code, First Name, Last Name, Gender, Date of Birth, Race and School Code*. At a minimum, your district should import these key fields to minimize duplicate data entry. While importing these nine fields creates a new student record, manual entry of other demographic fields will be required prior to logging services for students.

In addition to those elements required in order to generate a new student record, there are additional compliance data elements (highlighted in the import formats) that are needed to meet the audit requirements for the PA School-Based ACCESS Program. These include IEP Dates, Primary Disability, Parental Consent dates, Physician Authorization Dates and Provider License/Certification Dates.

Recommended fields

PCG recommends that you import all of the fields listed in the accompanying import format. By importing all of the fields listed, manual data entry of student compliance data will be significantly reduced.

In the following few pages, please find the specification outline for extracts, as well as a step-by-step guide to importing the extract into EasyTRAC™ and evaluating the result of each import. **Please note that importing SIS data into EasyTRAC™ is not without risks; an improperly-formatted file (or a file containing inaccurate information) may result in corrupted or unreliable data in the EasyTRAC™ database**. You are strongly encouraged to follow suggestions below for creating and importing a small test file before attempting a full import of a district.

File Specifications

Tab-delimited text files and Microsoft Excel (saved in .xls or .xlsx format) files are acceptable file types for an EasyTRAC™ import. If you choose to import via an Excel spreadsheet, it is HIGHLY recommended that you format ALL cells to recognize Numbers as "text". This will prevent Excel from dropping any leading zeros that may exist in your data upload.

Text Files (TXT)

- Must be named "Students", "Services", "Users", "Caseloads", or "ServiceLogs"
  - May have additional info if a dash is added ("Students – <anything else>.txt").
- Must be tab delimited.
- May not contain text qualifiers.

Excel Files (XLS, XLSX)

- No restrictions on file name.
- Spreadsheet/Tab in Excel Workbook that contains the data must be named "Students" or other specified data set name, as referenced above.
- **It is recommended that data types be entered one at a time to reduce issues when reviewing output error files.**

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For both files

- Some fields *MUST* contain values matching a list that is coded into EasyTRAC™.
- These values can be viewed within the corresponding "Crosswalk" tabs and be used as a reference guide. These elements are highlighted in Blue on the import format. Content included in these fields that does *not* match the expected elements will not be imported and may cause either a Warning (partial record population) or an Error (No record added or updated within EasyTRAC™).

Common questions

Q: How do I generate an extract?

A: Work with your local system administrator in order to extract the required information that is available in your SIS, District HR, or other LEA systems.

Q: How do I make sure I am using the right file format?

A: Use any of the following methods:

- Ensure that your file format matches the format in the sample TXT and XLS/XLSX files.
- Ensure that the column headers match those specified in the ***PA Access Data Exchange Format*** file.
- Try importing a small file of 5-10 records as a test.

Q: Which fields are **required** in order to add a new student?

A*: DistrictCode, StudentCode, StateCode, FirstName, LastName, Gender, DateOfBirth, Race and SchoolCode*

Q: Which fields are **required** in order to update a student?

A: *DistrictCode*, *StudentCode* and the applicable field(s) that have information to be updated.

Q: Is it better to use a Text File (TXT) or Excel File (XLS/XLSX)?

A: This is a matter of preference and to offer the widest possible range of compatibility for your systems or administrative staff familiarity. EasyTRAC™ will handle the files the same way.

Q: How are student records in the import matched to EasyTRAC™?

A: Records are matched using the *StudentCode* field.

***PLEASE NOTE*: If the *StudentCode* of your students contain leading ZEROS, you MUST reformat the cells of your Excel file to recognize "Numbers as Text" PRIOR to populating your file. Failure to do so will result in Excel dropping the leading zeros on your file and may result in duplicate student records or ERRORS in Service Log uploads.**

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Q: If there is a "crosswalk" error in the Import Verification email, what do I do? Do I have to re-import the entire file or just the corrections?

A: If an error is encountered during the crosswalk process, **none** of the additions or changes contained in the file will be stored in EasyTRAC™. Instead, you must correct the error that is noted in the verification email, and then re-import the entire file.

Creating a Test File

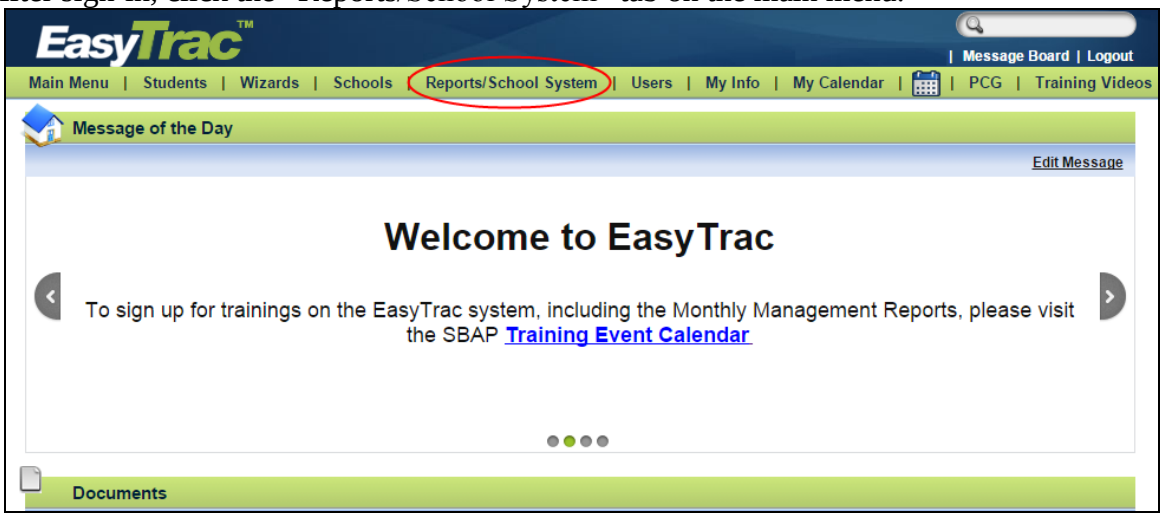
This is an optional, but ***HIGHLY*** recommended, step for LEAs that are either new to the upload process or those that upload infrequently.

Prior to importing an entire file for an LEA, it is **strongly recommended** that a sample file containing only 5-10 students, services, etc is generated and subsequently imported into EasyTRAC™. By working with a small data file initially, it is possible to quickly determine the validity of the import file format and ensure that no formatting issues will impact the larger import.

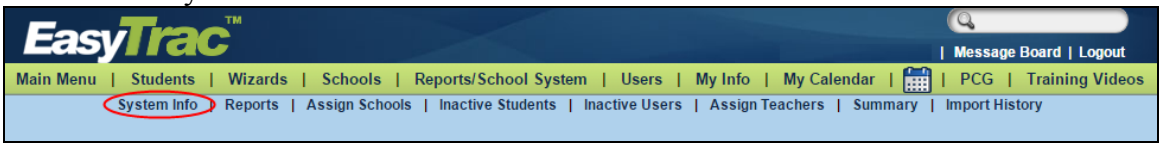
Please contact SBAP Support (SBAPsupport@pcgus.com) prior to uploading your test file to ensure the accuracy of the data that you intend to upload.

Import Process

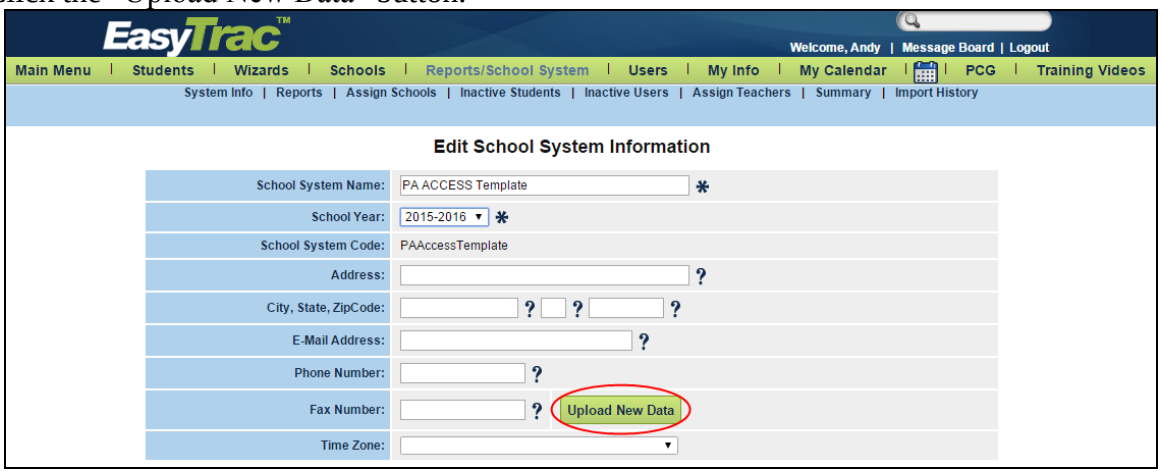
1. After sign-in, click the "Reports/School System" tab on the main menu.



2. Click the "System Info" tab.

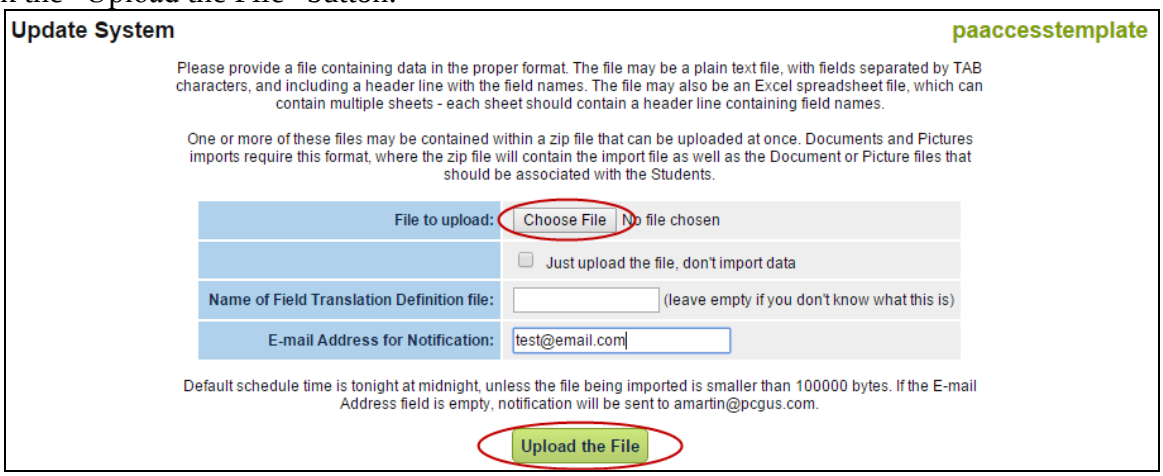


3. Click the "Upload New Data" button.



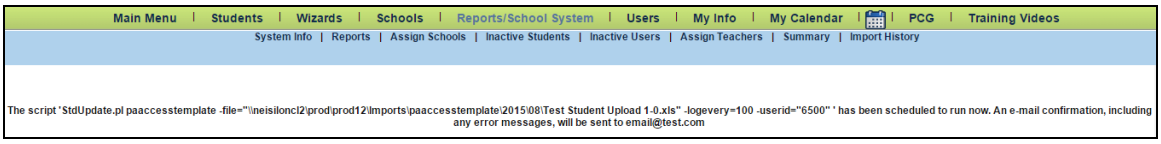
4. Click the "Choose File" button to select the file to upload. Verify/Update your email address in the "E-mail Address for Notification" text box. **Carefully double-check the email address. If it is incorrect, you will not receive a notification when the import is complete**. This information cannot be retrieved elsewhere, so it is critical that this email address is accurate, current and correct.

Do not update any other fields on this page. When you are ready to begin the import process, click the "Upload the File" button.



Please note that processing time will depend on the size of your file; it may take several minutes to fully upload to EasyTRAC™.

5. When the file has been accepted for uploading, a confirmation screen will appear with a message similar to the one below.

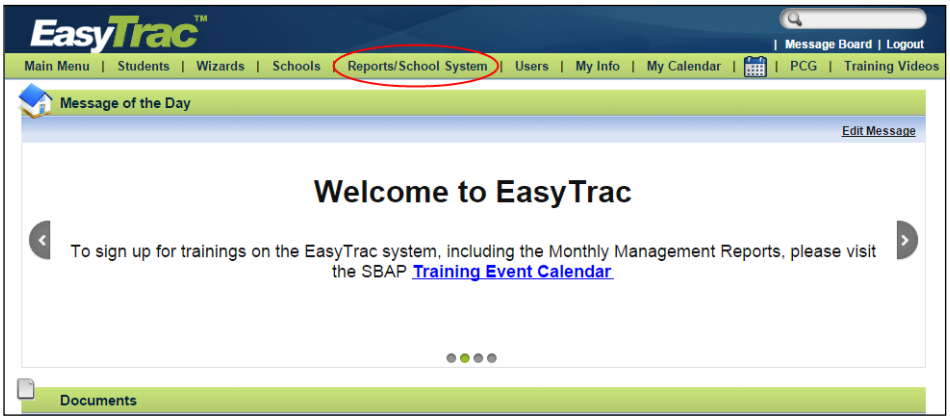


If the file is less than 100kb, it will be scheduled to begin import processing almost immediately. If the file is over 100kb, it will be imported sometime after midnight the following day (e.g., if a 2 MB file is uploaded at 1:30 PM on Monday, it will not begin import processing until after 12:00 AM on Tuesday). If needed, you can break up a large file into smaller files to process them on the same day.

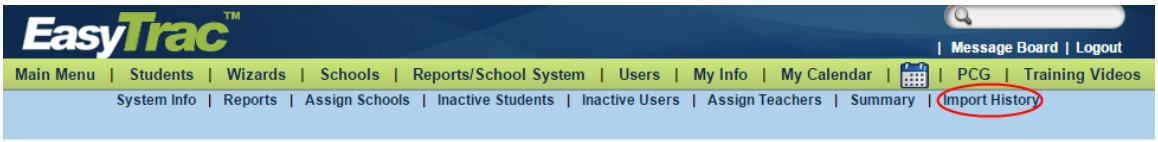
Import Verification

When the import has completed, a confirmation email will be sent (to the email address specified in step #4 above) informing the user that the upload has completed. An Import History file will be generated and placed on your EasyTRAC™ site.

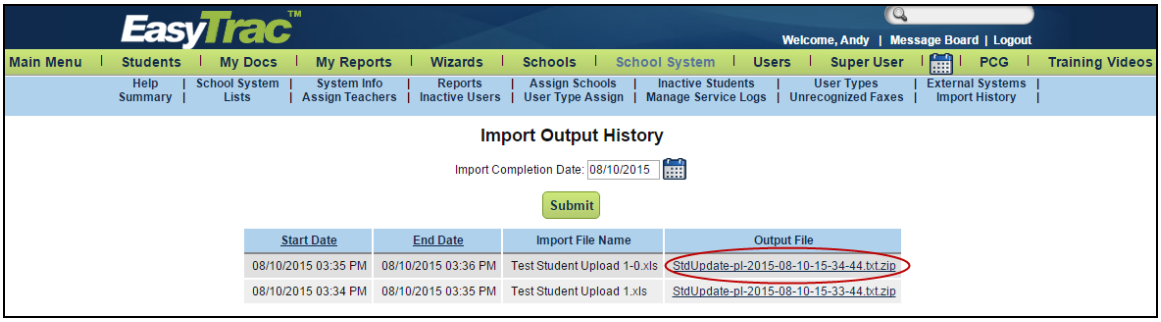
1. Click the "Reports/School System" tab on the main menu.



2. Click the "Import History" tab



3. Click the Output File that corresponds to the most recently uploaded file. You can view files uploaded on other dates by changing the date in the "Import Completion Date" field and clicking the "Submit" button.



4. Once the text file downloads, you can copy the text and paste into an Excel spreadsheet for easier viewing.

Below is an example of an Import Output file:

```
Running import(s) for paaccesstemplate:
TextFile: \\neisiloncl2\prod\prod12\Imports\paaccesstemplate\import\Students.txt
   STUDENTS         => student-Converted.txt
================================================================
importStudents\\neisiloncl2\prod\prod12\Imports\paaccesstemplate\import\student-Converted.txt
================================================================
================================================================
Students Import Summary
================================================================
Actual Number of Records:                      13
Students Added:                                 0
Students Updated:                              13
Total Errors:                                   0
Total Warnings:                                 0
================================================================
Time Taken:  6 wallclock secs ( 5.46 usr +  0.02 sys =  5.48 CPU)
================================================================
================================================================
Import Summary (Overall)
================================================================
Number of Affected Customers:                   1
Total Number of Records:                       13
Number of Cached DB Statements:                 4
Total Errors:                                   0
Total Warnings:                                 0
================================================================
Done!
```

Reviewing the Output File

If any errors occur during the import, these will be noted in this Output file.

The following is a list of *common* WARNING/ERROR messages:

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Please Note:

- Any records that trigger a *WARNING* were uploaded.

- Any records that trigger an *ERROR* were NOT uploaded. Please refer to the line reference in the Output file, correct the data in THAT LINE and re-upload ONLY the lines that triggered the *ERROR* message.

1. Students File:

ERROR: *Invalid File type*

- When you're creating your import, only keep the tabs that have the data you are importing and that the tab is appropriately named to the type of data being imported (per the directions under the "File Specifications" area of this document. It is recommended that you copy your data (with the header row) to a clean spreadsheet, keeping the Template as it stands for reference. Things like the Crosswalk tabs are for information purposes only and the system won't recognize them as imports.

WARNING: *048293: IEPDate without Primary Disability (line 45)*

- In order to generate an IEP, you need to have a Primary Disability; this field must be first populated in order to add/import the IEP information

WARNING: 080235: *Error importing IEP Date: The IEP Begin Date can't be before the Meeting Date (line 61)*

- The field "LastIEPDate" on the import document identifies the IEP Meeting Date for the student. This field must be a date on or before the listed IEP Begin Date.

ERROR: *District Code: 58293 does not match current district! (line 96)*

- You can only import students into your own LEA site, so the data in this field must be your LEA AUN. If you provide services to students in other LEAs and need to track that for billing purposes, the AUN of that district would be recorded in the RespDistCode field for those students.

WARNING: *Unknown School '2724': Student=059283*

- This indicates that there is no school with the code 2724 in the Schools tab of the site. Either this is a mistake or there is a missing school or code in the site.

WARNING: *019049: Error importing IEP Date: The IEP Begin Date can't be more than 366 days after the Meeting Date*

- The IEP End Date cannot be longer than 1 year from the Last IEP Date (Meeting Date) listed as IEP's are only 1 year long.

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2. Services File:

ERROR: *Service 'Other' not found and custom Special Ed Services are not allowed*
ERROR: *Service 'Speech and Language Pathology/Therapy' not found and custom Special Ed Services are not allowed*
ERROR: *Service 'Transportation' not found and custom Special Ed Services are not allowed*

- Services need to match the Services included in the ***Services Crosswalk*** tab. Only values from the Crosswalk will be accepted, as they are the approved Medicaid Services with codes that will result in a successful claim. 'Other' is NOT a valid Medicaid service.

ERROR: *Service '' not found and Custom Special Ed Services are not allowed*

- This field cannot be blank for any student in the file. If you leave it blank a service will be added to the record.

3. ServiceLogs File:

WARNING: 55 minutes of this service have already been logged for Tue Aug 26 2014. (line 3) (ID='4824')

- This warning indicates that 55 minutes of this service have already been logged for this student, for this day. This log HAS been uploaded, but please review service logs to ensure accuracy.

ERROR: A duplicate log has been found for this student, with identical:date, type (line 2)

- This ERROR indicates that a log with the same date and service type already exists in EasyTrac. This service log HAS NOT need uploaded. Please review your upload file AND existing logs in EasyTrac for accuracy.

ERROR: You must enter Service Start and End Times with a duration of at least 1 minutes. (line 3) (ID='TEST9028')

- All "Direct" Service Logs must have a start and end time entered. Evaluations are billed on a duration and would not include a start time/end time in the import document; only a number of minutes would be identified for evaluations.

ERROR: Henry Doe is inactive and services cannot be logged for inactive students. (line 2) (ID='TEST9033')

- This ERROR identifies that the student in the upload is inactive in the EasyTrac system and logs may not be entered for inactive students. The student must be reactivated by selecting "Reports/School System" → "Inactive Students" before logs may be entered.
    - NOTE: It is recommended that **all** Service Logs be entered for a student prior to making them inactive.

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WARNING: Cannot add Area Covered/Assessed 'Equipment: Student Training: Headstick; Dowel Pointer; Mouthstick; Switch; Fine Motor / Upper extremity: Functional Range of Motion' because it is not found in the system. (line 3) (ID='TEST9002')

- This WARNING indicates that the verbiage of the Areas Covered is NOT as it has been coded into the system. Please refer to the ServiceLogCodesLogList Crosswalk on the applicable ***PA Access Data Exchange Format*** file
- *If ALL AreasCovered trigger the above WARNING message, you will also receive the below ERROR message:*
    - ***ERROR***: You must enter at least 1 Areas Covered/Assessed. (line 3)
        - This service log was NOT uploaded due to no valid AreasCovered on your file, please review the AreasCovered on your file vs what is listed in ServiceLogCodesLogList Crosswalk on the applicable ***PA Access Data Exchange Format*** file.

Import Process Support

If you have any questions about the import process, please do not hesitate to contact us at SBAPsupport@pcgus.com or toll-free at 866-912-2976.