Adding Fall Flu Immunizations – Step 4C

Users: Educational & Data Managers

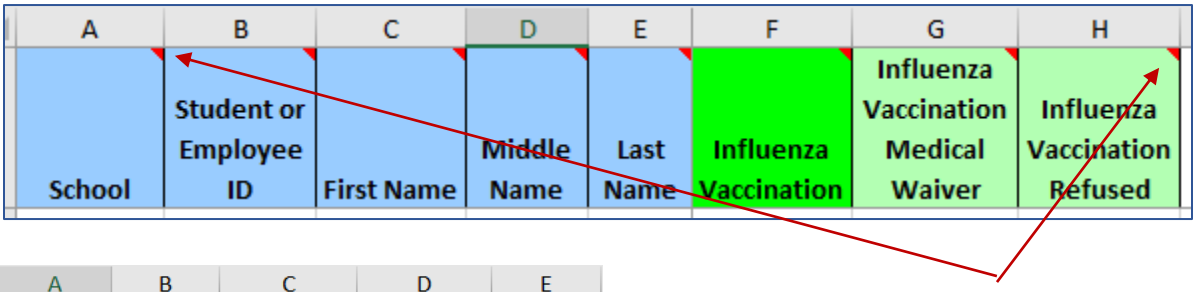
Background: Each fall, students and instructors are required to receive an influenza immunization or document their medical waiver/refusal. Influenza immunizations generally become available in early to mid-September and facilities usually require this immunization to be completed each year by the first part of October. Often, students and instructors are already in the clinical environment, so this immunization becomes an update to existing clinical requirements.

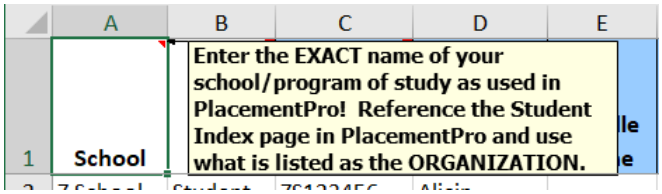
To enter this data, there are two methods:

1. Enter the data manually for each student using the Update Icon by their name on the Student Index screen like adding any other requirement (See CRM User Guide Step 4A).
2. Use a spreadsheet to upload the data in bulk.

Uploading Flu Data

Data Collection: Use the **FluShotUpdate.xls spreadsheet** found in the CRM Resources listed on the PlacementPro Resources page in the Partner section of the website.

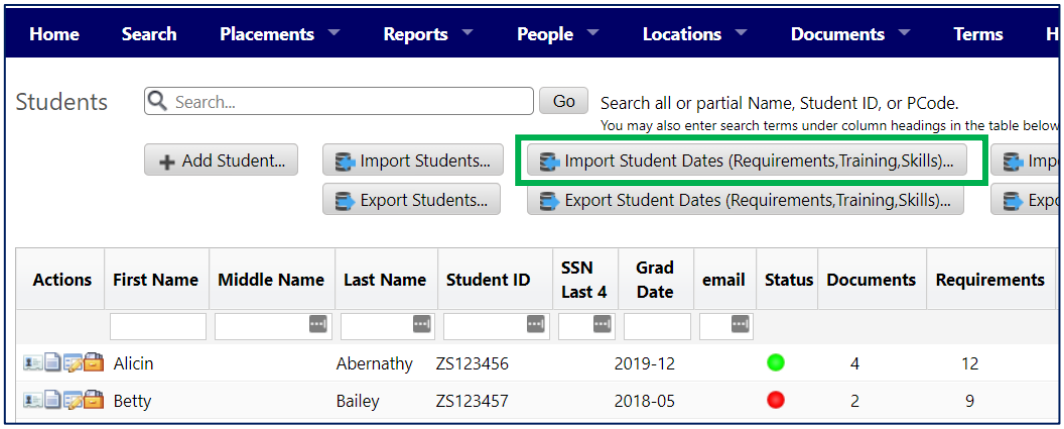




Note that any header with a red triangle has additional information to guide your data entry. Hover over the header with your mouse to see the popup instructions!

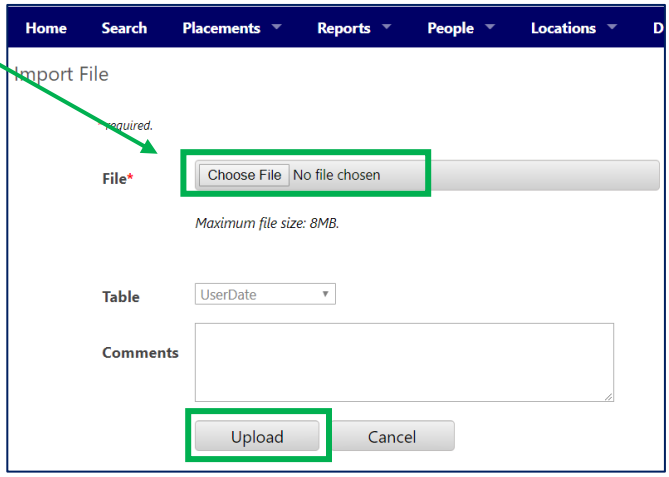
1. **Enter the School:** Use the EXACT name of your school/program of study as used in PlacementPro! Reference the Student Index page in PlacementPro and use what is listed as the **ORGANIZATION**.
2. You will need to use a separate spreadsheet for Students and Instructors.
3. **Enter the Student/Employee ID:** This is the unique identifier for the student or employee in the school's information systems. You can copy and paste this information from the initial spreadsheet you used for adding clinical requirements if available.
4. **Enter the First, Middle, and Last Name as they are currently listed in PlacementPro.**
5. Enter the date of the **Influenza Vaccination**. Dates should be entered using the **xx/xx/xxxx** date format. Leave this column blank if there is a medical waiver or refusal.
6. **Influenza Medical Wavier OR Refusal:** Enter dates (**xx/xx/xxxx**) in either column based upon the individual.
7. **Save** your spreadsheet with a name like ***SchoolName_FluShot_Fall20XX.xls*** so you can easily identify the correct spreadsheet for upload.

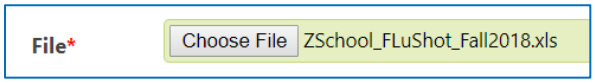
Data Upload: Log into PlacementPro. Go to PEOPLE→ Students to access your Student Index page. (PEOPLE→Instructors will work the same way when uploading Instructor data!) Data displayed here is for the Z School, the TCPS Training School.



1. Click on the Import Student Dates (Requirements, Training, Skills…) button.

2. From the new IMPORT File screen, click on the Choose File button to navigate to where you saved the file by. Select the file and click OPEN in the navigation window.

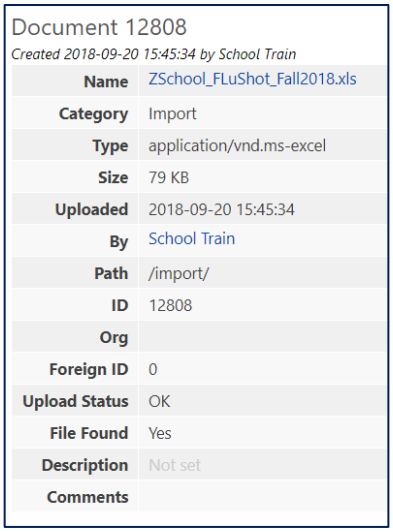




Your flu immunization file name will replace the No file chosen.
You can also enter comments such as "Flu Immunizations 2018", but this is not required.

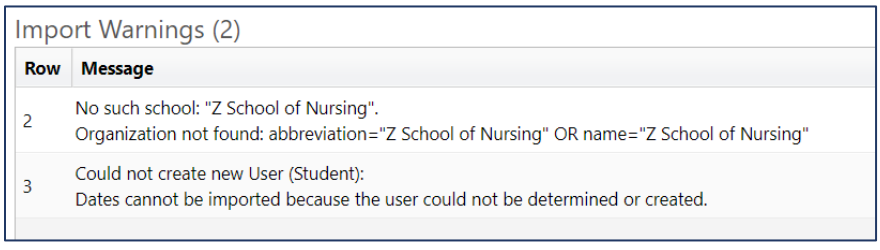
3. Click on UPLOAD

A successful upload will result in the upload detail screen.



You can now use the menu bar to navigate back to the student Index page to check your upload.

If there were errors, the import error screen will provide you with the row the erroneous data was on and what might be the problem with the data.



In this case, the wrong organization name was listed on row 2, and a student's name on row 3 did not match any other Z School student in PlacementPro. If you cannot easily determine why the upload did not work, reach out for assistance.