

## POS DATA EXCHANGE

This document contains the information for all files necessary to implement the SchoolCafé POS Module.

The process of setting up Data Exchange is divided into two phases: **Initial and On-Going**. The initial phase is to help us determine that we are getting the required data in the proper format. For the initial phase, a member of the SchoolCafé Expert Care Team will examine the provided sample data to make sure there are no duplicate Student IDs, correct school codes and grades are present, etc. Once the student file has been approved as complete, they will do the initial import into SchoolCafé. Afterwards, they will guide you on setting up the automatic uploads for the second phase.

It is critical that the file format used in the successfully imported initial file remains the same for all ongoing imports. Also, all files should contain **only** active Students. The date of the first appearance of a Student in a file will be assumed as the enrollment date. Similarly, if a Student is not included in a subsequent file, the date the file is provided will be assumed as the withdrawal date. The preferred format for all files is **| (pipe) delimited**, however tab delimited is also accepted.

Because these files may contain sensitive data, we do not recommend sending them via email. Each customer will be provided a **File Transfer Protocol (ftp)** site as a repository for the files. Your Project Mentor will send the ftp login instructions to you. Once logged in you'll see the ftp site contains several folders. While working on the initial import, please place the files in the **"Implementation Files"** folder.

### Student File

This guide is designed to help the Student Information System (SIS) Administrator or IT Department set up the Student Data Exchange between your SIS and SchoolCafé. Student data exchange is frequently set to occur on a daily basis, and can usually be set to automatically update SchoolCafé without user involvement

**The following table is a list of fields, in the preferred order, for the Student Information File. Data must be provided for all Required Fields.** If the preferred file format cannot be generated, a layout describing each field in the file must be provided.

#### File Details:

File Type	Delimited
Delimiter	Pipe (or Tab)
File Name	Student.txt
File location	Provided by DA
Frequency	Once (or more) Daily
Time	Recommended late at night or early morning

\* Required Fields ^Beneficial Fields

Description	Comments	Special Notes
Student ID*	Must be unique across District (aka Local ID)	Up to 10 digits numeric
StateID / OtherID^	SchoolCafe has a second ID field if desired ( i.e. State ID)	**May be required for State Implementations
Pin^	Extremely beneficial for districts utilizing unique pins.	
First Name*		
Last Name*		
Middle Name^		
Birth Date*	mm/dd/yyyy (default, but we accept other formats)	
School Code*	3-5 digit school code	Up to 5 alphanumeric
Grade*	Provide Codes in Codes table	
SSN^	Highly beneficial for Student Eligibility Matching	Numbers ONLY – no dashes
Ethnicity	H or N (Hispanic or Non-Hispanic)	Provide Codes in Codes table
Race	Specific	Provide Codes in Codes table
Primary Language^	Beneficial when sending POS related letters (like Balance Reminders) to Spanish speaking households	English or Spanish ( <b>Defaults to English</b> )
Gender*	Male, Female or Non-Binary	Provide Codes in Codes table
Street Address Line 1*		
Street Address Line 2		
Apartment*	Not required for imports into SchoolCafe, but necessary for correspondence to reach apartment residents	
City*		
State*	State abbreviation, not full name	
Zip*		
Homeroom^	Highly beneficial for Rosters, Letters, Classroom Sales, Picture Look-up	Up to 10 characters
Guardian First Name^	Beneficial for Eligibility Verification Processing	
Guardian Last Name^	Beneficial for Eligibility Verification Processing	
Home Phone Number		
Guardian Work Phone Number		
Email^	Beneficial for sending letters (like Balance Reminders and Eligibility Notifications) to parents.	
Special Instructions^	Special Instructions can be set to alert Cashier about student at POS	Up to 100 characters total (in the system it will be separated into 4 rows of 25 characters each)

## Student Pictures

Pictures uploaded into SchoolCafe will show in the students profile and on the POS.

- Upload your student pictures into the Implementation folder of the FTP. Pictures should be saved as StudentID.jpg (e.g. 1234.jpg).
- The mentor will create a ticket for the Expert Care Team to import the photos.

## Program Adults and Non-Program Adults

In SchoolCafe there are two types of Adults: Program Adults and Non-Program Adults. Typically, Program Adults are adults that work in the Food Service Department and might get a lunch meal at no charge. Non-program adults are district staff such as teachers or administrators who have a school meal account.

- To enter Adults into SchoolCafe you can either add them manually or import two separate files.
  - One file for Program Adults and one file for Non-Program Adults.
  - Each file should be a text file with a tab or pipe delimiter with the required data: First Name, Last Name, School Code, and ID number.
  - All files should be placed in the Implementation folder of the FTP.

## Balance Files (Student and Adult)

Balances are the last files to be imported into SchoolCafe. This data will be imported as close to the Go Live date as possible so that there will be no changes between the time the balances are imported and the time you Go live with SchoolCafe.

- Please provide a excel spreadsheet or text (tab delimited) file with the Patron ID and final balance. Two separate files will be required for Student and Adult Balances.
- Only student IDs within SchoolCafe will have balances imported. Any patrons without an ID will not import and will be available on the Balance Import Summary supplied after the import.
- The Balance column should only contain numbers, no "\$".