

How to Create a Service via Import

Users can add a Service to SCRIBE manually and through an import. This PDF covers adding a service via import. See [How to Create A Service manually](#) article on the [SCRIBE Help Desk](#).

Create the File to Import

1. Determine the required and optional fields for a Service import. There are two ways:
 - a. **Look at the Import Template in your grant’s Google Drive folder.** Every import template has a tab that has the field headings and a tab that describes each field, whether the field is required, the type of data needed for that field and where to find that data.

| | A | B | C | D | E | F | G | H | I | |
|--|-----------|-------------|--------------|-----------|-----------|---------|------------|---------------|---------------------------|-----|
| 1 | ProgramID | ServiceName | SchoolNumber | SchoolYea | StartDate | EndDate | ServiceTyp | ServiceTypeId | ServiceDeliveryCategoryId | Ser |
| 2 | | | | | | | | | | |
| 3 | | | | | | | | | | |
| 4 | | | | | | | | | | |
| 5 | | | | | | | | | | |
| 6 | | | | | | | | | | |
| 7 | | | | | | | | | | |
| 8 | | | | | | | | | | |
| SampleFileFormat FieldsDescribed Service Type Category ID Service Type ID + | | | | | | | | | | |

| | A | B | C | D | E | F |
|----|--------|---------------------------|--------------|-----------|---|--|
| 1 | Column | Field Name | Field Length | Required? | Comments | Values |
| 2 | A | ExternalServiceID | 50 | Required | This is a unique value that is the same as the service name using the GEAR UP Service Naming Conventions. | |
| 3 | B | ServiceName | 50 | Required | Service Name using GEAR UP Service Naming Conventions | |
| 4 | C | SchoolNumber | 10 | Required | Th Unique Identifier for the school | In SCRIBE click on Schools>View all Schools for School Numbers. |
| 5 | D | SchoolYear | 4 | Required | Year of first marking period | e.g., "2019" for 2019-2020 school year, "2020" for 2020-2021 school year |
| 6 | E | StartDate | 10 | Required | Start date for which the service is/was active | MM/DD/YYYY |
| 7 | F | EndDate | 10 | Required | Date for which the service began to be active | MM/DD/YYYY |
| 8 | G | ServiceTypeCategoryId | | Required | Category for the service type of the service | Service Type Category IDs |
| 9 | H | ServiceTypeId | | Required | Service type that the service fulfilled | In SCRIBE click on Reports > SCRIBE Configuration > Service Taxonomy |
| 10 | I | ServiceDeliveryCategoryId | | Required | Category for the service delivery of the service | 8: Virtual 9: Real (In-Person) 10: Telephonic |
| 11 | J | ServiceDeliveryId | | Required | How the service was delivered | 25: Virtual 26: Real (In-Person) 27: Telephonic |
| 12 | K | ServiceTimingCategoryId | | Required | | 8 |
| 13 | L | ServiceTimingId | | Required | | 27 |

Note: Remember to download the Import Template from the Google folder and save it on your desktop before editing it. Click **File > Download > Microsoft excel**.

How to Create a Service via Import

- a. The second way to determine the required fields: In SCRIBE click **Tools > Import**. Click **Add Import**. Select the Import Type. Click the **View Specification** button.

The **Import Specification** list will appear in a popup box. The fields with a red asterisk are required, the other fields are optional.

Import Specification ×

GEAR UP Demo - Cohort Model - Service List
 This import is used to add Services and assign them to Schools. This file should be uploaded and successfully imported before the Service Participation file.

*** = Required - field must be in your file**
○ = Optional - field should only be in your file if you are providing values

| Field | Status | Description |
|-------------------------------|--------|---|
| ExternalServiceId | * | Service identifier |
| ServiceName | * | Service name |
| SchoolNumber | * | School identifier |
| SchoolYear | * | School Year (ex: 2010 for the 2010-2011 school year) |
| StartDate | ○ | Start Date for which the Service is/was active (ex: mm/dd/yyyy) |
| EndDate | ○ | End Date for which the Service is/was active (ex: mm/dd/yyyy) |
| ServiceTypeCategoryId | * | Category for the Service Type |
| ServiceTypeId | * | Service Type - what function the Service fulfilled |
| ServiceTypeAdditionalInfo | ○ | Additional info if the Service Type requires it |
| ServiceDeliveryCategoryId | * | Category for the Service Delivery |
| ServiceDeliveryId | * | Service Delivery - how the Service was delivered |
| ServiceDeliveryAdditionalInfo | ○ | Additional info if the Service Delivery requires it |
| ServiceTimingCategoryId | * | Category for the Service Timing |
| ServiceTimingId | * | Service Timing - when the Service was delivered |
| ServiceTimingAdditionalInfo | ○ | Additional info if the Service Timing requires it |

Note: SCRIBE will consider any fields included in the import that are not listed on the Import Specification list as “unknown” fields during the import process.

How to Create a Service via Import

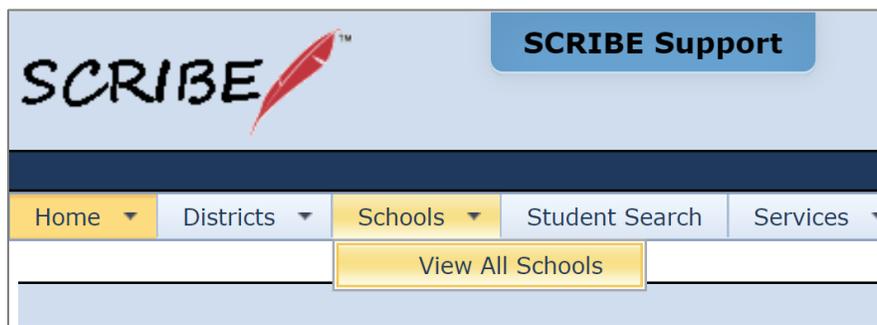
Fields

Fields are the different data categories you can include in the Service List import file (e.g., ServiceName, SchoolNumber, etc.) listed as separate columns in the spreadsheet. Some fields are **required**, meaning SCRIBE will not import your file without them. Some are **optional**, meaning it is up to you whether or not to include them in the import file.

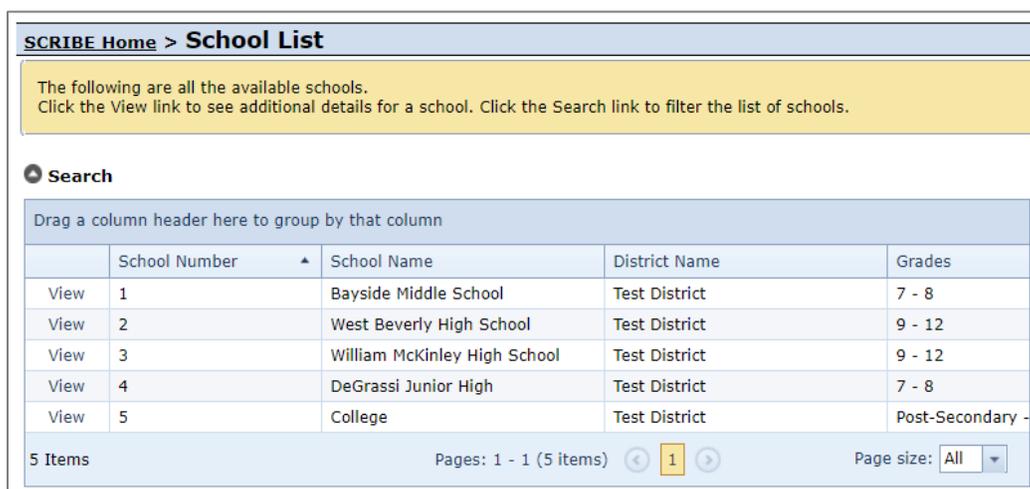
TIP: Fields (columns) can be in the import file in any order. Field headings must be spelled correctly but capitalization does not matter (e.g., ServiceName = servicename = SERVICENAME = sErViCenAmE). There are no spaces in the field headings (e.g., SchoolYear is not the same as School Year).

Fields in a Service List Import (* indicates a required field)

- ExternalServiceID*: unique value using the SCRIBE Service Naming Conventions. The ExternalServiceID should be the same as the ServiceName.
- ServiceName*: unique name of the service using SCRIBE Service Naming Conventions. The ServiceName should be the same as the ExternalServiceID.
- SchoolNumber*: In SCRIBE click **Schools** > **View All Schools**.



The list of **School Numbers** are displayed in the School list. Copy the School Number of the school the students attend and paste it in the Service List Import spreadsheet in the SchoolNumber field.



SCRIBE Home > School List

The following are all the available schools.
Click the View link to see additional details for a school. Click the Search link to filter the list of schools.

Search

Drag a column header here to group by that column

| | School Number | School Name | District Name | Grades |
|------|---------------|------------------------------|---------------|----------------|
| View | 1 | Bayside Middle School | Test District | 7 - 8 |
| View | 2 | West Beverly High School | Test District | 9 - 12 |
| View | 3 | William McKinley High School | Test District | 9 - 12 |
| View | 4 | DeGrassi Junior High | Test District | 7 - 8 |
| View | 5 | College | Test District | Post-Secondary |

5 Items Pages: 1 - 1 (5 items) Page size: All

How to Create a Service via Import

- d. SchoolYear*: first year in the two year school year (e.g., “2019” for the 2019-2020 school year, “2020” for the 2020-2021 school year)
- e. StartDate: day service is/will become active.
- f. EndDate: day service is/will become inactive.

Note: For one time services, the StartDate and EndDate will be the same date. For recurring services, the StartDate should be the first day of the month and the EndDate should be the last day of the month.

- g. ServiceTypeCategoryID*: code for the service type category. See the ServiceTypeCategoryID tab in the service list import template or the Service Taxonomy exported from SCRIBE (instructions below).
- h. ServiceTypeID*: code for the service type. See the Service Taxonomy exported from SCRIBE (instructions below).
- i. ServiceDeliveryCategoryID*: code for the service delivery category.
Codes: **8** for Virtual
 9 for Real (In-person)
 10 for Telephonic
- j. ServiceDeliveryID*: code for how the service was delivered.
Codes: **25** for Virtual
 26 for Real (In-person)
 27 for Telephonic
- k. ServiceTimingCategoryID*: enter **8** in this field for all rows.
- l. ServiceTimingID*: enter **27** in this field for all rows.
- m. PersonType1: indicated whether the service will be for students, parents or staff members.
Codes: **1** for student
 2 for parent/guardian/family
 3 for teacher/staff

Note: SCRIBE will allow a service to be assigned to up to three PersonTypes (fields are PersonType1, PersonType2, PersonType3). However, best practice recommends one PersonType per service. If a service caters to more than one person type (e.g., financial aid night for parents and students), create one service for students and another service for parents.

- n. IsSTEM: indicates whether the service is a STEM service. Enter **Yes** or **No**.
- o. IsELL: indicates whether the service is an ELL service. Enter **Yes** or **No**.

How to Create a Service via Import

p. ServiceProvider1:

Note: Up to three ServiceProviders may be added to the service list import (fields are ServiceProvider1, ServiceProvider2, ServiceProvider3).

q. ServiceNotes: use this field to indicate any relevant information that is not part of the service name or service summary (e.g., the destination of a field trip or if a service gets canceled).

r. ServiceTypeAdditionalInfo: Required for college visits. Enter the IPEDS number for the college visited. IPEDS can be found at nces.ed.gov/globallocator.

Note: To retrieve the ServiceTypeCategoryID, ServiceTypeID, ServiceTimingCategoryID, ServiceTimingID, ServiceDeliveryTypeID and ServiceDeliveryID, export the Service Taxonomy.

In SCRIBE click Reports > SCRIBE Configuration > **Service Taxonomy**.

Select the **Person Type(s)** to narrow the services listed on the Service Taxonomy (optional). Select **Report Format** to run the report as an Excel file or a PDF. Click **Generate Report**.

The screenshot shows the 'Service Taxonomy' report generation page in SCRIBE. The page has a breadcrumb trail 'SCRIBE Home > Service Taxonomy'. Below the title is a yellow header bar with the text 'Service Taxonomy'. Underneath is a 'Report Filters' section with three rows of options:

- Program Type(s):** Includes checkboxes for 'GEAR UP' and 'General (Use for Programs not tracked in SCRIBE)'. Both are currently unchecked.
- Person Type(s):** Includes checkboxes for 'Student', 'Parent/Guardian', and 'Staff', along with a 'Select All' option. All are currently unchecked.
- Report Format: *** Includes radio buttons for 'EXCEL' (which is selected) and 'PDF'.

A 'Generate Report' button is located at the bottom right of the filter section.

How to Create a Service via Import

| | A | B | C | D | E |
|----|---|-----------------|--------------|---------------|---|
| 1 | Service Taxonomy | | | | |
| 2 | | | | | |
| 3 | Service Types | | | | |
| 4 | Tutoring/homework assistance (ID = 1) | | | | |
| 5 | Service Type | Service Type Id | Person Types | Program Types | |
| 6 | T - Tutoring | 185 | Student | GEAR UP | |
| 7 | | | | | |
| 8 | Support Services (ID = 43) | | | | |
| 9 | Service Type | Service Type Id | Person Types | Program Types | |
| 10 | SUP - Support Services | 417 | Student | GEAR UP | |
| 11 | EXT - Extracurricular Activity with definition or example - GPA recognition | 481 | Student | GEAR UP | |
| 12 | TST - Standardized Test Prep | 606 | Student | GEAR UP | |
| 13 | | | | | |
| 14 | Rigorous academic curricula (ID = 2) | | | | |
| 15 | Service Type | Service Type Id | Person Types | Program Types | |
| 16 | STEM - STEM Time | 663 | Student | GEAR UP | |
| 17 | | | | | |
| 18 | Comprehensive mentoring (ID = 3) | | | | |
| 19 | Service Type | Service Type Id | Person Types | Program Types | |
| 20 | MEN - Mentoring | 527 | Student | GEAR UP | |

ServiceTypeCategoryID

ServiceTypeID

| | | | | | |
|-----|--------------------------------------|--|--|--|---------------------|
| 82 | | | | | |
| 83 | Service Timings | | | | |
| 84 | N/A (ID = 8) | | | | |
| 85 | | | | | |
| 86 | Service Timing | | | | Service Timing Id |
| 87 | N/A | | | | 27 |
| 88 | | | | | |
| 89 | Service Deliveries | | | | |
| 90 | Virtual (ID = 8) | | | | |
| 91 | | | | | |
| 92 | Service Delivery | | | | Service Delivery Id |
| 93 | Virtual service delivery method | | | | 25 |
| 94 | | | | | |
| 95 | Real (Not Virtual) (ID = 9) | | | | |
| 96 | Service Delivery | | | | Service Delivery Id |
| 97 | Real service delivery method | | | | 26 |
| 98 | | | | | |
| 99 | Telephonic (ID = 10) | | | | |
| 100 | Service Delivery | | | | Service Delivery Id |
| 101 | Telephonic service delivery method | | | | 27 |

ServiceTimingCategoryID

ServiceTimingID

ServiceDerliveryCategoryID

ServiceDeliveryID

How to Create a Service via Import

Sample Service List Import File

| | A | B | C | D | E | F | G | H |
|---|--|--|--------------|------------|-----------|-----------|---------------------------|-------------------|
| 1 | ExternalServiceID | ServiceName | SchoolNumber | SchoolYear | StartDate | EndDate | ServiceDeliveryCategoryId | ServiceDeliveryYr |
| 2 | OneT.CSS.UCF.Apr2019.WBHS | OneT.CSS.UCF.Apr2019.WBHS | 2 | 2019 | 4/5/2019 | 4/5/2019 | 8 | 25 |
| 3 | OneT.FAC.FAFSAworkshopparents.Mar2019.WBHS | OneT.FAC.FAFSAworkshopparents.Mar2019.WBHS | 2 | 2019 | 3/15/2019 | 3/15/2019 | 8 | 25 |
| 4 | Rec.MEN.peer.Apr2019.WBHS | Rec.MEN.peer.Apr2019.WBHS | 2 | 2019 | 4/1/2020 | 4/30/2020 | 8 | 25 |
| 5 | Rec.SWS.FridayParentworkshop.May2019.WBHS | Rec.SWS.FridayParentworkshop.May2019.WBHS | 2 | 2019 | 5/1/2019 | 5/31/2019 | 8 | 25 |
| 6 | Rec.TMT.AlgebraZoomDropIn.Mar2020.WBHS | Rec.TMT.AlgebraZoomDropIn.Mar2020.WBHS | 2 | 2019 | 3/1/2020 | 3/30/2020 | 8 | 25 |
| 7 | Rec.TMT.AlgebraZoomDropIn.Apr2020.WBHS | Rec.TMT.AlgebraZoomDropIn.Apr2020.WBHS | 2 | 2019 | 4/1/2020 | 4/30/2020 | 8 | 25 |
| 8 | Rec.TMT.AlgebraZoomDropIn.May2020.WBHS | Rec.TMT.AlgebraZoomDropIn.May2020.WBHS | 2 | 2019 | 5/1/2020 | 5/30/2020 | 8 | 25 |

Import Course List file

1. Save the Service List import file following best practice naming conventions: include the school year, type of import, other necessary details like month, quarter or semester, school/district name or abbreviation (e.g., 19-20_ServiceList_January_WBHS).
2. In SCRIBE, click **Tools > Import**.



3. Click **Add Import**.



4. Select the **Import Type: Service List**.

How to Create a Service via Import

The screenshot shows a form titled "Add Import". It has two main sections: "Import Source" and "Import Type". The "Import Source" dropdown is set to "GEAR UP Demo - Cohort Model". The "Import Type" dropdown is set to "Service List".

5. Make sure the **School Year** is correct. Click **Browse** to select the import file from your computer. Click **Upload Import File**. Follow the import process.

The screenshot shows the "Add Import" form with the following details:

- Import Source:** GEAR UP Demo - Cohort Model
- Import Type:** Service List
- Import Config:** GEAR UP Demo - Cohort Model - Service List
- School Year:** 2019 - 2020
- Data File:** Choose import data file (with a "Browse" button)
- Buttons:** Cancel, Upload Import File

Additional text on the right side of the form: "Provide your data as a CSV (comma-separated variable) file or MS Excel (XLSX) file with one Worksheet. It's best to only include the data you intend to be imported into SCRIBE." and a "View Specification" button.

Note: You must add participation to the services you have just created. See [How to Add Participation via Import](#) and [How to Add Participation Manually](#) for instructions.

Additional Resources:

[How to Import Data PDF](#) and [webinars](#)
[Troubleshooting Importing PDF](#) and [video](#)
[How to Add Services Manually](#)

Log into the [SCRIBE Help Desk](#) using your SCRIBE log in.