Designated Learning Institution Portal Import Functionality

July 2017 consultation summary

Designated Learning Institution Portal: Import Functionality

CONSULTATION SUMMARY

WEBINAR AND CONFERENCE CALL | JULY 13, 2017

MODERATED BY IMMIGRATION, REFUGEES AND CITIZENSHIP CANADA (*INTERNATIONAL STUDENT PROGRAM AND SOLUTIONS AND INFORMATION MANAGEMENT BRANCH*) | DESIGNATED LEARNING INSTITUTIONS PARTICIPATING

Purpose of discussion

- IRCC presented the proposed option for the bulk import functionality in the Designated Learning Institution (DLI) Portal, for which this consultation was arranged. The bulk import functionality has been requested by DLIs and stakeholders. This functionality allows DLIs an alternative to reporting on students individually during twice-yearly periodic verification, which can be cumbersome for schools with large international student populations.
- DLI representatives were asked to raise any other general concerns with the DLI Portal, on which IRCC committed to following up.

Bulk import functionality
Summary of discussion

- DLIs are seeking an import solution that would allow them to input student information in a bulk fashion through the DLI Portal.
- The manual spreadsheet submission used in previous reporting periods will **no longer** be accepted.
- IRCC presented the bulk import option, which would be in XML format.
  - This was developed with the understanding that DLIs have the capacity to build what they may need on their end to meet IRCC's IT needs.
  - Users would export an XML script from the DLI Portal, and then merge with updated information on student statuses. This merged script would then be imported back in through the DLI Portal.
  - Data could be uploaded in batches, wherein partial uploads could still be processed.
    - The "total records" and "records ready to transmit" must still match before a periodic verification report could be submitted.
  - Any data entry errors would be indicated. Error messages would also appear in response to network or system errors.
- DLIs reiterated the need to ensure usability for multiple users to be working on compliance records at the same time.
- While DLIs see the XML bulk upload submission as a step forward, they would prefer this to be phase one of several to move towards a CSV submission.
  - Most DLIs would prefer a CSV format for the bulk upload functionality because this would allow DLIs to complete all compliance reporting in-house rather than seeking assistance from IT colleagues to generate XML scripts.
- IRCC reiterated the need to ensure data integrity (i.e. users modifying data validation fields), and noted that XML is the best way to do so at this time.
- Several DLIs expressed the need to consult within their institutions with IT colleagues in order to determine if this option is feasible.

Updates

- Following comments and concerns expressed during the consultation, IRCC will allow submitting student information in XML or CSV format. If fixed data fields are changed, then the DLI Portal will not accept input; therefore, it is extremely important to ensure that locked data fields remain as such.
  - Smaller DLIs with only a handful of international students can still report directly in the DLI Portal. Larger schools are encouraged to submit through XML script in order to minimize the likelihood of human error in data entry.
  - IRCC will accept changes only to the student number field, and the status field (from the fixed pick list).
- Information can be uploaded in batches or all at once by the user. The same error messages and data validation mechanisms will be in place in order to ensure data integrity.

Mock-up of export/import page

The following is an initial mock-up of what the export/import page will include in the DLI Portal. As you can see, while student lists can be exported from the DLI Portal in XML, CSV or Excel, submissions must be done as XML or CSV.

Export/Import Student List

> Return to Compliance Requests

Export Student List

Overview text - message to be worked on.

Download the Compliance Report from IRCC in form of Extensible Markup Language (XML) file.

The downloaded XML file is based on the following XSD schema   link to XSD schema

File format
- ○ XML
- ○ Excel
- ○ CSV

This text will change to support different file formats.

> Export

Import Student List

Overview text - message to be worked on.

Uploading this XML file will update Student ID and Status fields in Compliance Report.

The XML file will be validated based on the following XSD schema

The user is required to fill in the Student ID and Status fields based on the following criteria:

1. Student ID is an optional alpha numeric text no longer than 25 characters.
1. Status is a mandatory field and can be one of the following options:

- ◉ No show (4536)
- ◉ Full - time studies (4537)
- ◉ Authorized leave (4538)
- ◉ etc...

This text will change to support different file formats.

File format
- ○ XML
- ○ CSV

Choose a file from your computer   **(required)**

[   ]   Choose File

Acceptable File types : XML, CSV   *Maximum file size: 5MB*

> Upload File

XML schema

The following is the schema that should be followed for XML submissions. Note that the code is in English but the status options will be available in English and in French.

Generate XML file

```xml
<ComplianceReport xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:noNamespaceSchemaLocation="file:///C:/Temp/DLIComplianceReport.xsd">
    <Activities>
        <act>
            <aID>27564354</aID>
            <sID/>
            <ln>Smith</ln>
            <fn>John</fn>
            <dob>
                <y>1998</y>
                <m>02</m>
                <d>05</d>
            </dob>
            <uci>867565364</uci>
            <st>
                <stCd/>
                <stEn/>
                <stFr/>
            </st>
        </act>
    </Activities>
</ComplianceReport>
```

Status and Student ID fields are left empty for user to fill.

XML file requirements:
Student ID is an alpha numeric text no longer than 25 characters. (optional)
Status (required).

General issues with DLI Portal

Student numbers not updating

Issue: DLIs expressed concerns regarding the accuracy of student numbers, and noted that updates to student numbers during period verification are not reflected in subsequent verification reports.

Solution: This issue came forth because manual data fixes were being conducted based on the student's compliance status, and any other information amended by the DLI in manual spreadsheets was not updated in our systems. Because the next reporting period will not include any manual work, updates made at that time should be reflected in our systems and consequently in all following verification reports.

Confirmation emails from submitting periodic verification reports

Issue: DLIs continue to receive reminder emails to complete outstanding reports in the DLI Portal even after they have submitted their reports. Further, emails indicating confirmation of submission are sometimes not seen directly by the user completing the report.

Solution: Note that email correspondence is sent to the primary user of the account; therefore, correspondence confirming submission of a report will go to whoever is listed as the primary user. Please verify with your respective provincial/territorial authorities that your user information is up to date prior to reporting periods beginning.

IRCC is amending the text in the notification to add clarity to emails indicating confirmation of report submission. Further, changes are being made to ensure that DLIs do not receive notifications once they have submitted reports, and the wording is being amended to indicate that the note can be disregarded if a report has already been submitted. These changes will be in place for the November 2017 reporting period.

Duplicate data

Issue: Students were appearing multiple times on the same reports, or appearing on reports despite having previously been reported as "Program completed".

Solution: In previous reporting periods, a significant portion of data was entered manually. Given that this time around the data will be input automatically, this should not be an issue following the November 2017 reporting period. Further, IRCC has conducted a data cleanup exercise to ensure duplicate records do not appear.

Matching IRCC data with student information

Issue: DLIs are facing challenges in matching IRCC student data with their own. This causes issues in reporting as being unable to match a student may inadvertently result in entering a non-compliant status. DLIs suggested collecting student numbers as a mandatory data element, or providing other information that IRCC collects in order to match with student data.

Solution: Student numbers cannot be collected as a mandatory data element as there is too much variance in the formats used for data, and it would therefore be difficult to ensure data accuracy for an open text field that we do not necessarily verify. Furthermore, some DLIs do not issue student numbers with a letter of acceptance, so not all students would even have this information.

If a DLI is unsure about a student status, note that the definitions of each status option are readily available in the [Compliance Reporting guide on the IRCC website](). For additional questions, the primary and secondary representatives for DLIs are able to contact IRCC through our mailbox ([DLI-list-liste-EED@cic.gc.ca]()).

IRCC must meet various privacy obligations, and therefore cannot share the data we collect in order to process a study permit application unless the legal authority exists. Currently this is not an approach that is feasible, nor will it be particularly helpful as the data may have changed (for example, an email address associated with a study permit application could be that of their lawyer's, and students have no obligation to update such information when there is no active application). However, as expressed by several other DLIs, collecting the Unique Client Identifier (UCI) from students is an extremely effective method to match students to data elements. IRCC does provide the UCI within periodic verification reports; DLIs requesting this information from the student would help ease the challenges in matching data.

Enhancements to search functionality

Issue: For period verification reports, DLIs expressed the desire to be able to sort through records in a way that the set of records shown would be those not yet verified. This would make it easier in situations where multiple individuals fill out the reports, and one person can easily arrive at where the previous individual left off without much searching.

Solution: IRCC is looking into possible enhancements to the search functionality in the DLI Portal in a way that maximizes usability and usefulness for DLIs during reporting periods. Note that existing concerns with the utility of the search functionality will no longer be as pressing with the implementation of the bulk import functionality.