

CSV File Format Design

Overview

The document outlines the CSV specification for syncing in Parent, Student and Staff information into the Flexischools platform. It is expected that all information will be within in one CSV file and contains all records.

Families

Within Flexischools, there is a concept of a Primary Parent, they are considered the Account Holder, and the wallet will be linked to this account. `FamilyCode` is used to identify the relationships of Parents and Students during the sync.

Once synced, Students are linked to the Primary Parent. There may be multiple Parents within the CSV linked to the same `FamilyCode`, but only one will be treated as the Primary and any other will be considered Secondary.

The school may identify the Primary Parent via the `IsPrimary=true` field. This is optional and if not set, then the system will pick the first Parent as the Primary.

Staff

Staff can be included as part of the sync and will have the ability to use Flexischools platform for ordering just like a Parent. There is no `FamilyCode` for Staff.

When Staff is synced, the system will assign them as the Primary Parent and create a Student record with the same name.

CSV File Format

File Naming Convention

school_data_<SchoolName>_<YYYYMMDD>.csv

Examples:

school_data_ISHCMC_20260401.csv

school_data_UNIS_20260401.csv

The `SchoolName` in the filename is for human readability and S3 folder organisation only. It is not parsed as a column inside the file.

Column Definitions

All rows share the same header. Columns not applicable to a given `UserType` must be left empty.

#	Column Name	Applicable for	Type	Description
1 - Mandatory	UserType	All	Enum	Parent, Staff, or Student. Determines how the row is processed.
2 - Mandatory	FamilyCode	Parent, Student	String	School-defined family identifier. Groups all members of the same family. Mandatory for Parent, Student. Not needed for Staff
3 - Optional	IsPrimary	Parent only	Boolean	true or false. Exactly one Parent row per FamilyCode must be true. Leave empty for Staff and Student rows. If not provided, the first parent of same family is the primary parent
4 - Optional	Title	Parent, Staff	String	e.g. Mr, Mrs, Ms, Dr, Mx. Leave empty for Student. Maximum 10 characters
5 - Mandatory	FirstName	All	String	First name of the user. Maximum 30 characters.
6 - Mandatory	LastName	All	String	Last name of the user. Maximum 30 characters.

7 - Mandatory	Email	Parent, Staff	String	Login identifier. Must be a valid email format. Leave empty for Student.
8 - Mandatory	ClassName	Student	String	Must match an existing class name within the school. Leave empty for Parent. For Staff , if empty then the system will default to “Staff” as ClassName
9 - Optional	CardNumber	Student, Staff	String	Physical card number pre-linked to the student. Leave empty for Parent.
10 - Mandatory	UserId	Parent, Student, Staff	String	Unique ID code pre-linked to the parent, student and staff per school. This is used to identify the user for updates during every sync.
11 - Optional	WalletBalance	Parent (IsPrimary=true) only	Decimal	Existing wallet balance to migrate to the primary parent's account. Must be >= 0. Leave empty for secondary parents, staff, and students. If the user already exist in the system, this field is ignored.

Sample File

```
UserType,FamilyCode,IsPrimary,Title,FirstName,LastName,Email,ClassName,UserId
,CardNumber,WalletBalance
Parent,FAM001,true,Mrs,Jane,Smith,jane.smith@email.com,,,,,25.50
Parent,FAM001,false,Mr,John,Smith,john.smith@email.com,,,,,
Parent,FAM002,true,Ms,Sarah,Johnson,sarah.j@email.com,,,,,10.00
Staff,,,Mr,David,Lee,d.lee@toorak.edu.au,Staff,123456,A123456,4521001234,
Student,FAM001,,,Oliver,Smith,,3B,98765432,S4521001234,
Student,FAM001,,,Lily,Smith,,1A,98765431,S4521001234,
Student,FAM002,,,Noah,Johnson,,5C,98765431,S4521001234,
Student,FAM002,,,Mia,Johnson,,2A,98765431,S4521001234,
```

- FAM001 — Jane is primary parent (\$25.50 wallet balance migrated). John is secondary, linked to Jane via `SecondaryCustomerRepresentative(17)`. Oliver and Lily are both linked to Jane.
- FAM002 — Sarah is the sole primary parent (\$10.00 wallet balance migrated). Noah and Mia are linked to her.

- David is a staff member. Two `User` records are created: a parent-side user and a student-side user. The parent-side links to the student-side via `CustomerRepresentative(16)`. The student-side links to the school account via `Customer(2)`.

Row order does not matter. The Pre-load Data Load API processes all `Parent` and `Staff` rows before any `Student` rows regardless of their position in the file.

Validation Rules

All rows

Rule	Detail
<code>UserType</code> must be <code>Parent</code> , <code>Staff</code> , or <code>Student</code> (case-insensitive)	Any other value rejects the row
<code>FamilyCode</code> MUST NOT be empty for <code>Parent</code> and <code>Student</code>	
All required fields for the given <code>UserType</code> must be non-empty	Row is rejected if a required field is blank

Parent rows

Rule	Detail
<code>Email</code> must be valid format	Follow the existing email format validation
<code>Email</code> must be unique within the file	Duplicate emails reject both rows and its related students rows
<code>IsPrimary</code> must be <code>true</code> or <code>false</code> (case-insensitive)	Any other value rejects the row and its related students row
Each <code>FamilyCode</code> must have exactly one <code>IsPrimary=true</code> Parent row	Zero or multiple primaries per family rejects all rows for that family including its students. If <code>IsPrimary</code> is not provided, the first parent becomes the primary parent
<code>WalletBalance</code> must be ≥ 0 if provided	Negative values or empty means no need to migrate wallet balance
<code>WalletBalance</code> must be left empty for <code>IsPrimary=false</code> rows	Only the primary parent carries the family wallet balance

Staff rows

Rule	Detail
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Email must be valid format and unique within the file	Same as Parent
ClassName must exist within the school	Required — used to register the staff's student-side user
IsPrimary must be left empty	Not applicable for Staff rows

Student rows

Rule	Detail
FamilyCode must match a Parent row in the same file	Unknown family codes reject the row
FirstName + LastName + IdCode must not duplicate an existing student of the resolved primary parent	Same check as existing AdminAddStudents flow
ClassName must exist within the school	Validated via Schools service
CardNumber format is validated against the school's card domain if provided	Distribution method is always PreLinkedToUserID (4) — written to FMCards
