

Steps for Creating and Uploading 504 Plan data

1. Download and save this document, Steps for Creating and Uploading Student 504 Plan Data, the 504 Plan Template, and the Tips for Completing Student 504 Plan Template document.

- a. Documents may be found on the ISBE SIS website, <https://www.isbe.net/Pages/Student-Information-System.aspx>, by selecting the *Excel Templates* link in the *Resources* box
- b. Save the files to a local computer or server
 - i. Save the template to your computer/server before opening it in Excel. For example, right Click and perform 'Save As' or 'Save Target As'.
 - ii. Save the word documents (Tip Sheet and Steps) to your computer before opening it in Word.
- c. Excel Template is named → 504_Plan Template
- d. Excel Tips is named → Tips for Completing 504_Plan Template
- e. Steps document is name → Steps for Creating and Uploading 504_Plan Data

2. Create 504_Plan.csv File Header Row in Row 1/ Columns B, C, D & E

- a. Open the 504 Plan Template.
- b. Enter the number of student records being submitted in Row 1/Column B.
- c. Enter the name of the file adding .csv immediately after the name in Row 1/Column C (Ex: Riverton HS.csv).
Note: The exact same file name must be entered in the "SAVE AS" pop up (Name and Type fields) when creating the CSV file later in the process.
- d. Enter the date the CSV file to be uploaded to IWAS/SIS in Row 1/Column D (Ex: 06/15/2008).
- e. Enter your 15 digit RCDTS code in Row 1/Column E.
Note: This is the RCDTS assigned to your IWAS account. This can be verified via your IWAS profile.

3. Enter the student's Demographic, Enrollment, and 504_Plan Data

- a. Starting with Row 3 then working down the following rows without skipping any rows, enter all the mandatory data from Column A to Column K for each student record (see Tip Sheet for mandatory and optional fields).
- b. Refer to the appropriate Data Elements document for assistance with individual data specifications such as the ISBE descriptions, SIS codes and values etc...
- c. Enter the following data in the specified columns:
 - i. 9 digit Student Id (SID)
 - ii. Optional local SAP Identifier (up to 50 digits) if applicable
 - iii. Student's Legal Last Name
 - iv. Student's Legal First Name
 - v. Date of Birth using the mm/dd/yyyy format.
 - vi. 15 digit RCDTS code for the Home School.
 - vii. 15 digit RCDTS code for the Serving School.
 - viii. 4 digit school year.
 - ix. 504 Plan Start Date using the mm/dd/yyyy format.
 - x. Optional 504 Plan End Date using the mm/dd/yyyy format.

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xi. Optional Delete Record '99'

4. Save 504 Plan Excel Template as Comma Separated Values (.csv) File

- a. Open the Excel template with the 504 Plan data or if you already have the spreadsheet open, save the template as an Excel version type (.XLS extension) to keep the student record details just entered as a backup/working document.
- b. On the File menu click File → Save As
- c. In the **File name:** box type the same file name exactly as it is Cell C1.
- d. Look at the **Save in:** and either take note of where the file is being saved or change the location to another desired location. Keep the Save As type, Microsoft Excel Workbook. click Save.
- e. After saving the backup file, on the File menu click File → click Save As a second time.
- f. In the **Save as type:** list, select CSV (Comma delimited).
- g. Click **Save**.
- h. When prompted to keep the workbook in the current format, click **Yes** to finish saving the file.
- i. When prompted to save your changes to the CSV file click **No**.

Note: There will be 2 files at the end of these actions: the excel template and a .csv file.

5. Upload the 504_plan .csv file via IWAS/SIS/File Upload screen

- a. Login into IWAS/SIS using appropriate role for uploading – RCDT/ADMIN role.
- b. Access SIS (Student Information System) from System Listing
- c. Click **Upload File/Download** link within SIS
- d. Click **Browse** and locate the CSV 504_Plan File (The file with the name entered from Cell C1. Example: Riverton.csv)
- e. Click **Open** (the complete file extension appears in field)
- f. Click the **Upload** button to complete the transmission to SIS
- g. If you receive a message indicating your file has been uploaded successfully you are finished and should wait to receive an email indicating your file has been processed and is ready to be downloaded.
- h. If you receive message(s) the file contains errors, go back to the Excel template version (the backup/working document created in Step 4a) to make necessary changes then re-create a new CSV file.

Note: Never make any changes in the CSV version. The formatting will be lost causing records to fail.

6. Review the Result Codes/ Messages in Columns K and L in Returned File

- a. Login to IWAS.
- b. Access SIS (Student Information System) from System Listing.
- c. Click Upload/Download File link within SIS.
- d. Locate the returned 504 Plan file (The file will have the exact same name as the one uploaded and entered in Cell C1. Example: Riverton.csv)
- e. Right click on the returned file and perform 'Save As' or 'Save Target As' to save the file to your pc or server. **Note: DO NOT OPEN THE FILE TO SAVE.**

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- f. After the file is saved, double click on the file (it will open with Excel) to review the Result Codes/ Messages returned at end of each record to determine if the record processed successfully.

7. Make changes if corrections are required and re-submit a new .csv file to IWAS/SIS.

- a. All corrections should be made in the 504 Plan Excel template saved as the backup/working document in Step 4a.
- b. Open the back up/working document and make the necessary corrections.
Note: Do not make any changes to information in the CSV format as the formatting will be lost and errors may result when submitted.
- c. Correct all errors identified by the Result Codes F, I, PL3, PL4, PL5, PL6, and PL7 (refer to the Batch Result Codes/ Messages table in the File format Layout for error descriptions)
- d. When all corrections are completed, create a new 504_Plan.csv file following the Save As process in Step 4 and the Upload File process in Step 5.