

Steps for Creating and Uploading Student Demographics Enrollment Data

- 1) **Download the Student Demographics Enrollment Excel Template, Tips Sheet, and Steps for Creating and Uploading a Student Demographics data**
 - a. Located on the SIS Website – <https://www.isbe.net/Pages/Student-Information-System.aspx>
 - b. Listed in Resources Box (Left of the page) → SIS Excel Templates
 - c. 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.
 - d. Excel Template is named → Student Demographics Enrollment Template
 - e. Excel Tips is named → Student Demographics Enrollment User Template
 - f. Steps document is named → Steps for Creating and Uploading a Student Demographics Enrollment User data.

- 2) **Authorized user must request the Student Demographics.csv file from IWAS/SIS/Request File screen.**
 - a. Authorized user must login to IWAS
 - b. Access SIS from System Listing
 - c. Click Request File link within SIS
 - d. Select the Student Demographics option from the drop down. Press the *Request file button* to submit your request for your school/district’s file.

- 3) **Create the Student Demographics - Enrollment.csv File Header in Row 1/ Columns B, C, D & E**
 - a. Enter the number of student records being submitted in Row 1/Column B.
 - b. Enter the name of the file plus .csv in Row 1/Column C (Ex: Riverton HS.csv).
Note: This exact same name must be entered in the “SAVE AS” pop up (Name and Type fields) when creating the CSV file later in the process.
 - c. Enter the date the .csv file to be uploaded to IWAS/SIS in Row 1/Column D (Ex: 09/05/2008).
 - d. Enter your district/school 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.

- 4) **Enter the student’s demographic, program indicator and enrollment details in the Student Demographics - Enrollment excel template**
 - a. Starting with Row 3 enter all mandatory data (see Tip Sheet for mandatory fields) and, when available, any optional data for each student record.
 - b. Enter the 9 digit SIS Student Id number in Column A
 - i) If the student has not been assigned a SID by SIS, leave blank and a new SIS SID will be assigned.
 - ii) If the student has a SID, the system will update student information and/or create a new enrollment.
 - c. Enter your local SAP Identifier (up to 50 digits) if applicable.
 - d. Enter the student’s Last Name, First Name and Middle Name.
 - i) If the full middle name is unknown, use the middle initial (no period) or if there is no legal middle name, enter an asterisk (*).

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- e. Use the date format – mm/dd/yyyy - for all date fields, i.e. Birth date and Enrollment Date.
- f. Enter the Mother’s Maiden Name (last name only) and the Birth Place Name (No periods or commas) when known.
- g. Use the correct Code Values (See the Data Elements Document located on the SIS Website – <https://www.isbe.net/Pages/Student-Information-System.aspx> for code values) for the following data elements:
 - i) 2 digit values for Lineage, Race, Gender, Reading 1st, Reading Improvement Block Grant Program, Eligible for Immigrant Education Program, Title 1, Homeless, Migrant, Private Schooled Student Indicator, Supplemental Educational Services, EL, IDEA Services, Alternate Assessment Indicator, FRL/Low Income, Century 21, Enrollment Type, Entry Grade and Dual Language.
 - ii) 3 digit value for Language of Instruction
 - iii) 3 digit value for Home Language
 - iv) 3 digit value for Native Language
 - v) 15 digit RCDTS codes
 - (1) The HOME school code will have the same first 11 digits as the district code with different last 4 digits which identify the school building.
 - (2) The SERVING school may be the same as the Home (if the student attends their home school for educational services) or different (if the student attends another education entity for their educational services such as a Special Ed cooperative or a vocation education facility).
 - vi) 4 digit school year (2021 represents the 2020-2021 school year).
 - vii) 1.00 decimal for the Percent Day Attended factor (PDA) for the Serving school.
 - (1) A student cannot have more than 1.00 PDA for all active enrollments.
 - (2) If a student attends multiple schools for educational services, multiple enrollment records are to be created, with the PDA representing the amount of time the student spends at each serving school, i.e., .50 PDA for special ed and .50 for regular school.
 - (3) Only Kindergarten will be .5 PDA for Half Day and 1.0 PDA for Full Day.
 - (4) 2 digit values Tuition Received should be yes if students residing in a school district who choose to attend another school district and their parents pay that school district tuition.

5) Save the Student Demographics - Enrollment Excel Template as a Comma Separated Values (.csv) file

- a. Open the Student Demographics - Enrollment Excel Template or if you already have the spreadsheet open save the Excel version (.XLS extension) to keep the student record details just entered and keep a backup/working document.
- b. On the File menu click File → Save As
- c. In the File Name box type the same file name as you typed in 1-C excluding the ‘.csv’.
 - i) Example: If 1-C has Riverton.csv, type Riverton in the File Name box.
- 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) to add the .csv extension.
- g. Click Save.

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- h. When notified via a pop up that the file may contain features not compatible with CSV click Yes to keep the workbook in the current format and finish saving the file.
- i. Close the Excel 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.

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6) Upload the Student Demographics - Enrollment.csv file via IWAS/SIS/File Upload screen

- a. Login into IWAS/SIS using appropriate role for uploading – RCDT/ADMIN role.
- b. Access SIS from System Listing
- c. Click Upload/Download File link within SIS
- d. Click Browse to locate the CSV Student Demographics - Enrollment File named – (what you entered in 1-C).csv.
 - i) Example: Riverton.csv
- e. Click Open to return to the Upload File page
- 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 any file format errors you will want to go back to your Excel Template (XLS) version to make your changes and then re-create a new CSV file.

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

7) Review the Result Codes and Result Messages in Columns AJ and AK after the file is processed and returned to you.

- a. Login to IWAS.
- b. Access SIS from System Listing.
- c. Click Upload/Download File link within SIS.
- d. Locate the Student Demographics - Enrollment File named – (what you entered in 1-C).csv.
 - i) Example: Riverton.csv
- e. Save the file to your pc or a server.

Note: DO NOT OPEN THE FILE AND THEN SAVE WHILE THE FILE IS OPEN. Save the file before opening in Excel. For example, right Click and perform 'Save As' or 'Save Target As'.

- f. Import data from the returned .csv file to the existing Student Demographic-Enrollment Template (to add the returned SIDs).
 - i) Open the CSV file that you downloaded (DO NOT SAVE IT)
 - ii) Open the Student Demographic/Enrollment template (XLS)
 - iii) Keep both the source data spreadsheet and the Excel template open
 - iv) Highlight the cells - Row 2/Column A through Column AK and all rows with student data
 - (1) Make sure the Result Codes and Result Messages (AL and AM) are not copied to the template
 - (2) Do not highlight beyond column AK (the result details or blank space following) or highlight the entire row (do not include the row number on the far left).
 - v) Select Edit → Copy
 - vi) Navigate to the Student Demographic-Enrollment Excel Template
 - vii) Click on cell Row 3/Column A prior to pasting the data
 - viii) Select Edit → Paste Special

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ix) When the pop-up box opens Select *Values* and click *Ok*.

8) Make Changes if corrections are required and re-submit a new .csv file to IWAS/SIS.

- a. All corrections are made in the Student Demographics - Enrollment Excel template
- b. Open the original Student Demographic/Enrollment template to make the corrections.
- c. Do not make any changes to information in the CSV format as the formatting will be lost and errors may result when submitted.
- d. Correct all errors identified by an 'B2', 'B3', 'C', 'F', 'I', 'U3', and 'U4' in Column AL
- e. Change inaccurate data such as program indicators, grade levels, gender codes etc.
- f. When all changes are complete, create a new .csv file following the SAVE AS process.
- g. Upload the file to IWAS/SIS/File Upload screen.