

## Steps for Creating and Uploading Birth To Three Caregiver Data

1. **Download the Birth To Three Caregiver Excel Template, and Tips and Steps PDF Documents.**
  - a. Access the SIS Website at <https://www.isbe.net/Pages/Student-Information-System.aspx>
  - b. Click the *SIS Excel Templates* link listed in the “Other Resources” box.
  - c. Expand the *Early Learning* details.
  - d. Save the following files from the “Birth To Three Caregiver” section to a local computer or server before opening them (i.e., right-click the file and select *Save As* or *Save Target As*):
    - i. Windows or Mac Excel template
    - ii. Tips PDF document
    - iii. Steps PDF document
2. **Create the Birth To Three Caregiver File Header in Row 1/ Columns B – 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 is to be uploaded to IWAS/SIS in Row 1/Column D (Ex: 09/05/2021).
  - d. Enter your district/school 15-character 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 Demographics, Enrollment and Birth To Three Caregiver details in the Birth To Three Caregiver Excel Template.**
  - a. Starting with Row 3, enter all mandatory data and, when available, any optional data for each student record. See the Tips PDF document that was saved in step 1.d. above.
4. **Save the Birth To Three Caregiver Excel Template as a Comma Separated Values (.csv) file.**
  - a. Open the Excel template. 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 Row 1/Column C (1-C), excluding the ‘.csv’ extension.
    - i. Example: If 1-C has Riverton.csv, type Riverton in the File Name box.
  - d. Look at the *Save in:* field 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 and click *Save*.
  - e. After saving the backup file, on the File menu click *File → Save As* a second time.
  - f. In the Save As Type list, select CSV (Comma delimited) to add the .csv extension. Click *Save*.
  - g. When notified via a pop-up message 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. Close the Excel file.
  - h. 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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### 5. Upload the Birth To Three Caregiver file via IWAS/SIS.

- a. Login to IWAS using the appropriate role for uploading – RCDDT/ADMIN role.
- b. Access Student Information System (SIS) from the System Listing.
- c. Click the *Batch File Processing* menu item and then *Batch Transfers* sub-menu item.
- d. Click *Choose File* to locate the CSV file name you entered in Row 1/Column C (1-C) in the file header (Example: Riverton.csv).
- e. Click the file name in 1-C and then click *Open* to return to the Batch Transfers screen.
- 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, go back to your Excel template (XLS) version to make 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.*

### 6. Review the Result Codes and Result Messages in Columns P and Q after the file is processed and returned to you.

- a. Login to IWAS.
- b. Access Student Information System (SIS) from the System Listing.
- c. Click the *Batch File Processing* menu item and then *Batch Transfers* sub-menu item.
- d. In the Transmitted Batch Files grid, locate the CSV file name you entered in Row 1/Column C in the file header (Example: Riverton.csv).
- e. Save the file to your computer 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 select 'Save As' or 'Save Target As'.*
- f. Import data from the returned .csv file to the existing Excel template:
  - i. Open the CSV file that you downloaded (DO NOT SAVE IT).
  - ii. Open the Excel template (.XLS).
  - iii. Keep both the source data spreadsheet and the Excel template open.
  - iv. Highlight the cells - Row 2/Column A through Column O and all rows with student data.
    1. Do not highlight the entire row (i.e., do not include the row number on the far left).
    2. Do not highlight or copy any data beyond Column O (i.e., the result codes and messages or blank space following).
- g. Click *Edit* → *Copy*
- h. Navigate to the Excel template.
- i. Click on cell Row 3/Column A prior to pasting the data.
- j. Click *Edit* → *Paste Special*
- k. When the pop-up box opens, select *Values* and click *Ok*.

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

- a. All corrections must be made in the Excel template. Do not make any changes to information in the CSV format as the formatting will be lost and errors may result when submitted.
- b. Open the original Excel template (.XLS) to make the corrections.
- c. Correct all errors identified in Columns P and Q.

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- d. When all changes are complete, create a new .csv file following the SAVE AS process as defined in step 4 above.
- e. Upload the file to IWAS/SIS as defined in step 5 above.