

Steps for Creating and Uploading Exit Enrollment Data

- 1) **Download the Exit Enrollment Excel Template, Tips Sheet, and Steps for Creating and Uploading an Exit Enrollment .csv File**
 - a) Located on the SIS Website – <https://www.isbe.net/Pages/Student-Information-System.aspx>
 - b) In the Resources box (Left side of 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 → Exit Enrollment Template
 - e) Excel Tips is named → Exit Student Enrollment
 - f) Steps document is name → Steps for Creating and Uploading an Exit Enrollment .csv file

- 2) **Authorized user must request the Exit.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 (left side).
 - d) Select ‘Exit Enrollment’ from the drop down.
 - e) Choose Active Enrollments (default), Exited Enrollments Only, or All.
To exit students, choose ‘Active Enrollments.’
To update enrollment Attendance or Exit type, choose ‘Exited Only’.
 - f) Press **Request File** to submit your school/district’s file request.

- 3) **Appropriate personnel must import the data to the Exit Enrollment excel template.**
 - a) Open the CSV Exit file (ISBE_Enroll_Exit_<11 digit RCDT code>.csv) in excel (DO NOT SAVE IT).
 - b) Open the Exit Enrollment excel template.
 - c) Keep both the source data spreadsheet and the template open.
 - i) Highlight the cells - Column A through Column J and all cells with student data.
 - d) Select Edit → Copy
 - e) Navigate to the Exit Enrollment Excel Template
 - f) Click on cell Row 3/Column A prior to pasting the data
 - g) Select Edit → Paste Special
 - h) When the pop-up box opens Select *Values* and click *Ok*.

- 4) **Review the Exit Data relocated to the Exit Enrollment excel template.**

- 5) **Create the Exit 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.

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c) Enter the date the .csv file to be uploaded to IWAS/SIS in Row 1/Column D (Ex: 06/15/2008).

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.

6) Enter the student's exit enrollment details in the Exit 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

c) Enter your local SAP Identifier (up to 50 digits) in Column B if applicable.

d) Enter the student's Last Name and First Name.

e) Use the date format – mm/dd/yyyy - for both the Birth Date and Exit Enrollment Date fields.

f) Use the 15 digit RCDTS codes for the Home School and Serving School fields, i.e., 340491160262007.

i) 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.

ii) 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).

iii) Note: It is the Serving School enrollment record that is being exited.

g) g. Use the 2 digit code for the Exit Status and Exit/Withdrawal Type fields

i) The Exit Status field (Column I) should be completed with code 01- Permanent.

ii) The Exit/Withdrawal Type code table (for Column J) is found on the www.isbe.net/sis website under the Data Elements section.

iii) Note: The Exit/Withdrawal Type codes are used for exiting enrollment record both during a current school year and at the end of each school year.

7) Save the Exit Enrollment Excel Template as a Comma Separated Values (.csv) file

a) Open the Exit 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 → Save As

c) In the File Name box type the exact, 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*.

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.

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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.

8) Upload the Exit 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 Exit 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 – the backup/working document - 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.

9) Review the Result Codes and Result Messages in Columns K and L 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) If you want to import the data from the returned .csv file to a new Exit Enrollment Template (to view the returned result codes).
 - i) Open the CSV file that you downloaded (DO NOT SAVE IT)
 - ii) Open a blank Exit 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 L and all rows with student data
 - (1) Make sure the Result Codes and Result Messages (J and K) are copied to the template
 - (2) Do not highlight beyond column I (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 blank Exit Enrollment Excel Template
 - vii) Click on cell Row 3/Column A prior to pasting the data

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- viii) Select Edit → Paste Special
- ix) When the pop-up box opens Select *Values* and click *Ok*.

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

- a) All corrections are made in the Exit Enrollment Excel template
- b) Open the original Exit Enrollment template (the back up/working document and not the one with the result codes and messages) 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 in Column K
- e) When all changes are complete, create a new .csv file following the SAVE AS process.
- f) Upload the file to IWAS/SIS/File Upload/Download screen.