Tips for Completing ISBE SIS Student 504 Plan Template

Always work in the Excel Template/file if a change to 504 Plan data is needed.

Do not make any changes to information in the CSV format as the formatting will be lost and errors may result when submitted.

Row 1	**FILE HEADER**

1-A	File Type	504 Plan (already filled-in)
1-B	Total Number of Records	Number of student records you entered below
1-C		File Name including extension Name of your file (i.e., 504_10072008_001.csv) *Note:* 1-C file name must be same file name used for actual file name when you perform the 'save as' action.
1-D	File Sent Date	Date the file is being submitted via SIS to ISBE. *Note:* Date format is mm/dd/yyyy (i.e., 10/20/2008)
1-E	RCDTS	Your 15 digit District RCDTS code *Note:* Format is 111111111111111 – no spaces or hyphens between the digits. *Note:* The RCDTS code must match that of your IWAS login ID. You can verify this number by looking at your profile in IWAS.

EXAMPLES:

504 Plan					
	500	50082104002_10072008_001.csv		10/07/2008	5008210400260000

504 Plan					
	1400	RivertonHighSchool_10072008_001.csv		10/10/2008	3903031040020000

504 Plan					
	241	ShadyHillsSD_001.csv		09/08/2008	3903031040020000

Row 2	**COLUMN NAMES** (**READ Only**)
Row 3+	**STUDENT RECORDS**

Enter the appropriate 504 Plan data for each student record to add or update the 504 Plan data in the record(s). The descriptions and codes for these data elements can be found in the ISBE SIS Data Elements Document (https://www.isbe.net/Pages/Student-Information-System.aspx).

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➢ Row #3 contains a sample row. **The sample data should be deleted and replaced with valid student details.**

➢ The Student SID must be in Column A to add or update a 504 Plan record.

➢ The following fields must contain only alpha characters with the exception of hyphens ("-") and spaces:

  ▪ Legal First Name, and ▪ Legal Last Name.

  Note: No commas may be included in any of the fields.

Cell	Column Name	Value	M/O
3-A	Student ID	State-assigned SID	M
3-B	SAP Id	Local district student identifier	O
3-C	Legal Last Name	Examples: Jones; Smith-Jones; or St John	M
3-D	Legal First Name	Examples: Maryanne or Mary Ann	M
3-E	Birth Date	Date Format is mm/dd/yyyy Example: 09/20/1994	M
3-F	RCDTS for Home School	Identifies the student's home school **where the student resides** (the 15 digit Region-County-District-Type-School) Example: 340491160262007	M
3-G	RCDTS for Serving School	Identifies the serving school **where the student is sitting.** (the 15 digit Region-County-District-Type-School) Example: 340491160262007	M
3-H	School Year	School Year Example: 2019	M
3-I	504 Plan Start Date	The month, day, and year on which the 504 Plan begins. Date Format is mm/dd/yyyy Example: 10/06/2008	M

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3-J	504 Plan End Date	The month, day, and year on which the 504 Plan ended. Date Format is mm/dd/yyyy Example: 10/06/2019	O
3-K	Delete Record	Blank or "99"	O

ADDITIONAL TIPS

> **Copying Data into the Excel Template**

- Open the spreadsheet or document that contains the data you wish to copy.
- Only highlight the cells you wish to copy into the Excel Template. For example, highlight across from A2 to K2 then down to A150 to K150.
- Select Edit → Copy
- Open the Excel Template (Keep both the source data spreadsheet and the template open)
- Click on the first cell in the template (Cell A3 in the 504 Plan template) ▪ Select Edit →Paste Special
- When the pop-up box opens Select *Values* and click *Ok*. (this preserves the data formatting in the template)

> **Saving an Excel Template as a CSV**

- 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).
- On the File menu click File → Save As.
- In the *File name:* box type the same file name exactly as it is Cell C1.
- Look at the *Save in:* and either take note of where the file is being saved or change the location to another desired location and save the document.
- After saving the backup file, on the File menu click File → click Save As a second time.
- In the *Save as type:* list, select CSV (Comma delimited).
- Click *Save*.
- When prompted to keep the workbook in the current format, click *Yes* to finish saving the file.

> **Making changes to student information**

- Always work in the Excel template/file when making any changes to the student data.
- Do **not** make any changes to data in the CSV file. **The formatting will be lost and errors may result when submitted.**

> **Reviewing the Result Codes and Result Messages**

Tips for Completing ISBE SIS Student 504 Plan Template

- After you have downloaded the file from ISBE SIS, open the CSV file.
- Review the Result Codes/ Messages at the end of each record to determine if the record processed successfully.
- The Result PL1 indicates a 504 Plan record was successfully added and the Result Code PL2 indicates a 504 Plan record was successfully updated.
- **If the record did not process successfully**, the other Result Codes/ Messages will indicate what actions are needed to correct the errors. *See the Batch Result Codes/ Messages Table in the User Manual for details.*