## **Direct Certification/Direct Verification**



## **Preparing Your Files for Direct Certification Upload**



# **Table of Contents**



### This unit includes instructions on:

- Creating your enrollment file
- Entering required data
- Formatting your spreadsheet columns
- Saving your spreadsheet as an Excel file

# **Creating Your Enrollment File**

## **File Creation Specifications**

#### Step One\*

- Pull file from POS, SIS, or PEIMS; check that columns are in this order:
  - A. SSN (info not required)
  - B. Unique Student ID (info not required)
  - C. Last Name (required)
  - D. First Name (required)
  - E. DOB (required)
  - F. Gender (required)
  - G. Site ID (info not required)
  - H. Grade (info not required)
- I. CE ID (required)

#### Step Two

 Format your spreadsheet properly, see Preparing for Upload and Formatting Columns pages

1	A	В	С	D	E	F	G	Н	- E
1	123456789		LastName	FirstName	1/1/1900	M			09999
2	123456789		LastName	FirstName	1/1/1900	F			09999
3	123456789		LastName	FirstName	1/1/1900	F			09999
4	123456789		LastName	FirstName	1/1/1900	M			09999
5	123456789		LastName	FirstName	1/1/1900	F			09999
6	123456789		LastName	FirstName	1/1/1900	F			09999
7	123456789		LastName	FirstName	1/1/1900	F			09999
8	123456789		LastName	FirstName	1/1/1900	M			09999
9	123456789		LastName	FirstName	1/1/1900	M			09999
10	123456789		LastName	FirstName	1/1/1900	M			09999
11	123456789		LastName	FirstName	1/1/1900	F			09999
12	123456789		LastName	FirstName	1/1/1900	F			09999
13	123456789		LastName	FirstName	1/1/1900	М			09999
14	123456789		LastName	FirstName	1/1/1900	F			09999
15	123456789		LastName	FirstName	1/1/1900	м			09999
16	123456789		LastName	FirstName	1/1/1900	F			09999
17	123456789		LastName	FirstName	1/1/1900	F			09999
18	123456789		LastName	FirstName	1/1/1900	F			09999
19	123456789		LastName	FirstName	1/1/1900	м			09999
20	123456789		LastName	FirstName	1/1/1900	M			09999
21	123456789		LastName	FirstName	1/1/1900	м			09999
22	123456789		LastName	FirstName	1/1/1900	м			09999
23	123456789		LastName	FirstName	1/1/1900	F			09999
24	123456789		LastName	FirstName	1/1/1900	М			09999
25	123456789		LastName	FirstName	1/1/1900	F			09999
26	123456789		LastName	FirstName	1/1/1900	F			09999

\* See glossary at the end for definitions of abbreviations

# **Preparing for Upload**

### **Data and Format Requirements**

1	L7	• (0	f <sub>x</sub>							
24	А	В	С	D	E	F	G	Н	1	J
1		SSN	Unique Student ID	Last Name	First Name	DOB	Gender	Site ID	Grade	CE ID
2	Туре	Numeric	Numeric	Text	Text	mm/dd/yyyy	M or F	Numeric	Text	Numeric
3	Format	9 digits and 2 characters	10 digits	Up to 30 characters	Up to 30 characters	10 characters	1 character	4 digits with leading zeros	2 characters	5 digits with leading zeros
4	Required			YES	YES	YES	YES			YES
5	Notes		ID assigned by TEA, leave blank if null							

Please note:

- File must be in an Excel format (.xls or .xlxs)
- Columns must be in the order displayed

## Column A (SSN)

The SSN can contain hyphens or dashes.

### Step One

 Right click column A, select *Format* Cells

### Step Two

• Click *Special*, then select *Social Security Number* in the *Type* box

1	A	В	С	D	1	E	F	G	Н		
5	123-45-6789	Format Colls						2	~		
6	123-45-6789	ronnat Celis						1	^		
7	001-23-4567	Number Alignm	ent Fon	t Border	Fill	Protection					
8	123-45-6789	Category:									
9	001-23-4567	General	Si	ample							
10	123-45-6789	Number	1	123-45-6789							
11	123-45-6789	Accounting	TV	Type:							
12	001-23-4567	Date	Zit	Code					6		
13	123-45-6789	Percentage	7	Code ± 4							
14	123-45-6789	Fraction	So	ione Number icial Security Nu	mber						
15	001-23-4567	Text									
16	123-45-6789	Special							$\sim$		
17	123-45-6789	in the second	Loc	Locale (location): English (U.S.)							
18	001-23-4567		Er								
19	123-45-6789										
20	001-23-4567										
21			~								
22		Special formate ar	o usofil for	tracking list and	database	values					
23		Special formats at	e userui iui	u achirig list ariu	uatabase	values.					
24		C									
24	▶ ▶ Sheet1	3									

**Note:** It is no longer necessary to remove dashes or hyphens from the SSN.

## Column E (DOB)

## Format the DOB, column E, to display mm/dd/yyyy.

### **Step One**

• Select column E

### Step Two

• Right click column E, select Format Cells

### **Step Three**

 Select *Custom*, enter mm/dd/yyyy



## Column I (CE ID)

The CE ID must contain 5 digits with any leading zeros.

### **Step One**

• Select column I

### Step Two

 Right click column I and select Format Cells

### **Step Three**

• Select *Special*, then *Zip Code* to get 5 digits to display

Important: You may have to change the local (location) to English (U.S.) to get the 5-digit format for the CE ID.



## **Column I (CE ID) continued**

Remove extraneous data from rows **below** CE IDs (column I).

### Step One

 Click the first CE ID in column I after the last complete row of student data

### Step Two

 Press Cntrl + Shift + Down Arrow keys to select cells below the last CE ID to the bottom of spreadsheet

### **Step Three**

• Right click highlighted cells and select *Clear Contents* 

E	F	G	н	1	
12/12/1900	M			09999	Paste <u>S</u> pecial
12/12/1900	F			09999	Insert
12/12/1900	F			09999	Delete
12/12/1900	M			09999	Clear Contents
12/12/1900	F			09999	
12/12/1900	F			09999	Filt <u>e</u> r
12/12/1900	M			09999	S <u>o</u> rt →
12/12/1900	M			09999	Insert Comment
12/12/1900	M			09999	Format Cells
12/12/1900	F			09999	Pick From Drop, down List
12/12/1900	M			09999	Define News
12/12/1900	F			09999	Define Name
				09999	Hyperlink
				09999	
				09999	$\begin{array}{c c} \text{alibri} & \bullet & 11 \\ \bullet & \mathbf{A}^{T} \mathbf{A}^{T} \mathbf{A}^{T} \mathbf{A}^{T} \mathbf{S}^{T} \mathbf{S} \end{array}$
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				09999	
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				09999	

### **Finished spreadsheet example**

	L23	- (~ j	Ex.								*
	A <b>*</b>	в <b>*</b>	С	D		E	F	G*	н*	I I	F
5	123-45-6789	0016234567	Doe	Jane 🔶	12/12	/1900	F	0001	12	09999	
6	123-45-6789	0016234567	Doe	Jane	12/12	/1900	F	0001	09	09999	
7	001-23-4567	0016234567	Doe	Bob	12/12	/1900	M	0001	09	09999	
8	123-45-6789	0016234567	Doe	Bob	12/12	/1900	M	0001	10	09999	
9	001-23-4567	0016234567	Doe	No Col	umn	/1900	M	0001	11	09999	
10	123-45-6789	0016234567	Doe	hoodi	in ge	/1900	F	0001	10	09999	
11	123-45-6789	0016234567	Doe	neadi	ngs	/1900	M	0001	11	09999	
12	001-23-4567	0016234567	Doe	Jane	12/12	/1900	F	0001	12	09999	
13	123-45-6789	0016234567	Doe	Jane	12/12	/190	mm/d	ld/vvvv	11	09999	
14	123-45-6789	0016234567	Doe	Bob	12/12	/1900	М	0001	09	09999	
15	001-23-4567	0016234567	Doe	Bob	12/12	/1900	M	0001	10	09999	
16	123-45-6	SSN		Jane	12/12	/1900	F	0001	12	09999	=
17	123-45-6789	0016234567	Doe	Bob	12/12	/1900	M	0001	09	09999	
18	001-23-4567	0016234567	Doe	Jane	12/12	/1900	F			19999	
19	123-45-6789	0016234567	Doe	Jane	12/12	/1900	F	5-aigit (		.9999	
20	001-23-4567	0016234567	Doe	Jane	12/12	/1900	F	0001	10	09999	
21											

\* Info in columns A, B, G, H, is not required, only the columns are required.

# Saving Your File

### Keep it Organized!

Save your files so they are easy to find

### Step One

• Save file in the DC folder for current year

### Step Two

 Name file with current month-year CE Name DC Upload



**Remember:** Use numbers for current month-year to sort correctly

(e.g. 10-17 Lone Star State ISD DC Upload).

## Glossary

### **Abbreviations Used in This Document**

Abbreviation	Definition						
CE	Contracting Entities						
DOB	Date of birth						
ID	Identification						
Info	Information						
PEIMS	Public Education Information Management System						
POS	Point of Service						
SIS	Student Information System						



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