1. Formatting Excel File for CE Import Process

If you receive student enrollment data as an Excel spreadsheet it must be re-formatted as a comma delimited or comma separated (CSV) file before it can be used in the CE Upload process for Direct Certification or Direct Verification.

TDA recommends that you use the file structure described on page **Error! Bookmark not defined.**.

1.1 Save Copy of File

Save another copy of the file to reformat. A good file name would include the month and year, a description of what the data is, CSV (so it's easy to distinguish from the original file) and the date that the file was prepared.

Example:

Month_SchoolYear_Student_Enrollment_CSV_YYMMDD

Aug_2016_Student_Enrollment_CSV_150806

Writing the date as YYMMDD makes it easier to sort files by date created.

1.2 Right Columns/Right Order

Check that the columns are in the correct order:

- A - Social Security Number (SSN)
- B - Last Name
- C - First Name
- D - Date of Birth (DOB)
- E - Gender
- F - CE Identification Number

If there are any additional columns, delete the column. Select the letter at the top of the column, right-click and select *Delete* (Figure 55).
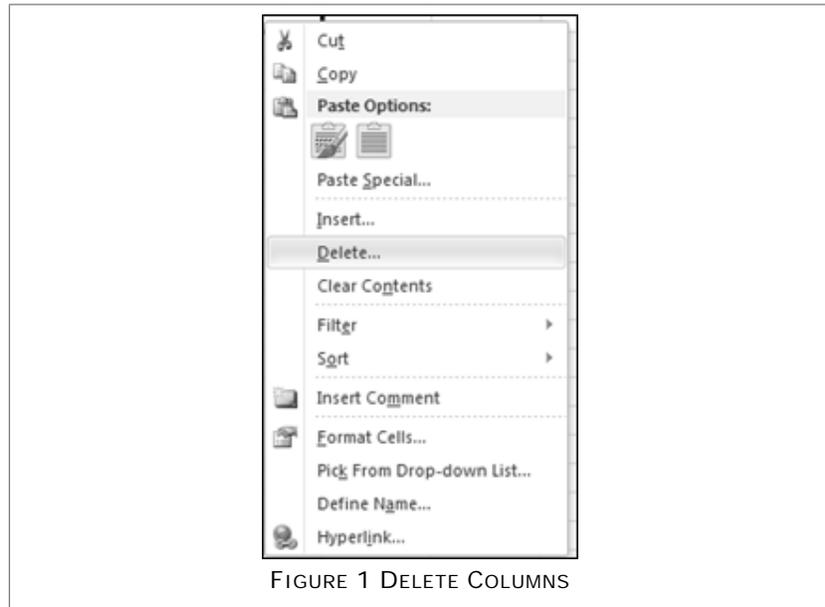

FIGURE 1 DELETE COLUMNS

1.3 Format Social Security Number

- Select Column A (SSN)
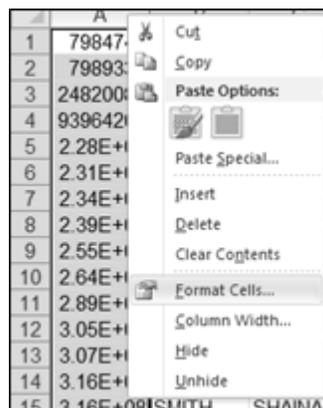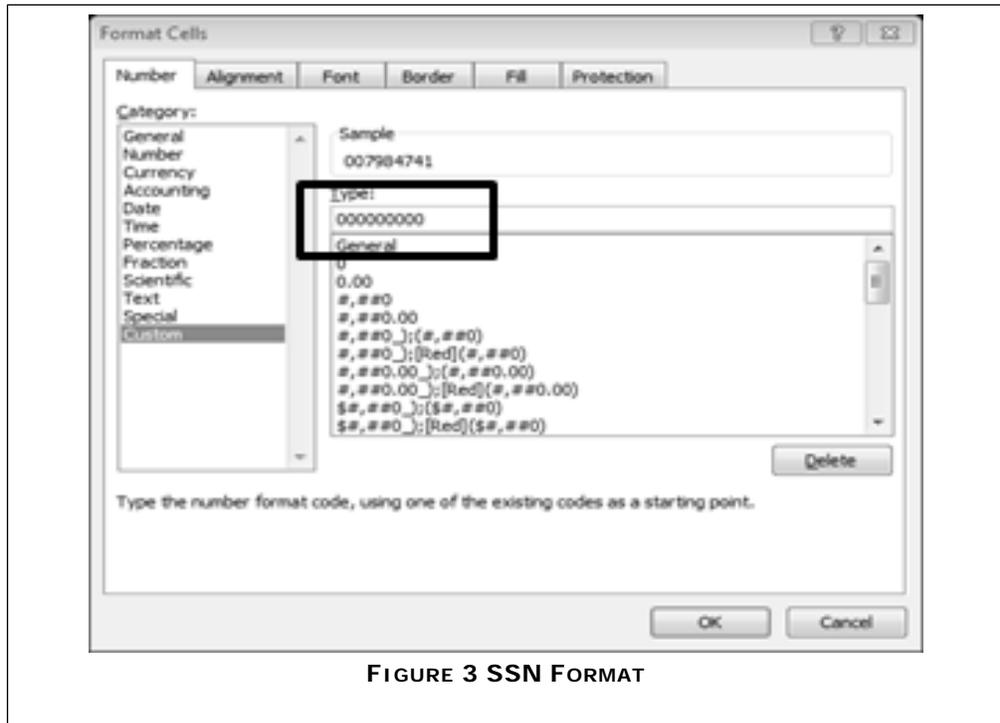
- Right-click and select *Format Cells (*Figure 56*)*

FIGURE 2 FORMAT CELLS

- Select *Custom* and under *Type* (were the word *General* is) enter 9 zeroes (Figure 57). Select *OK*.
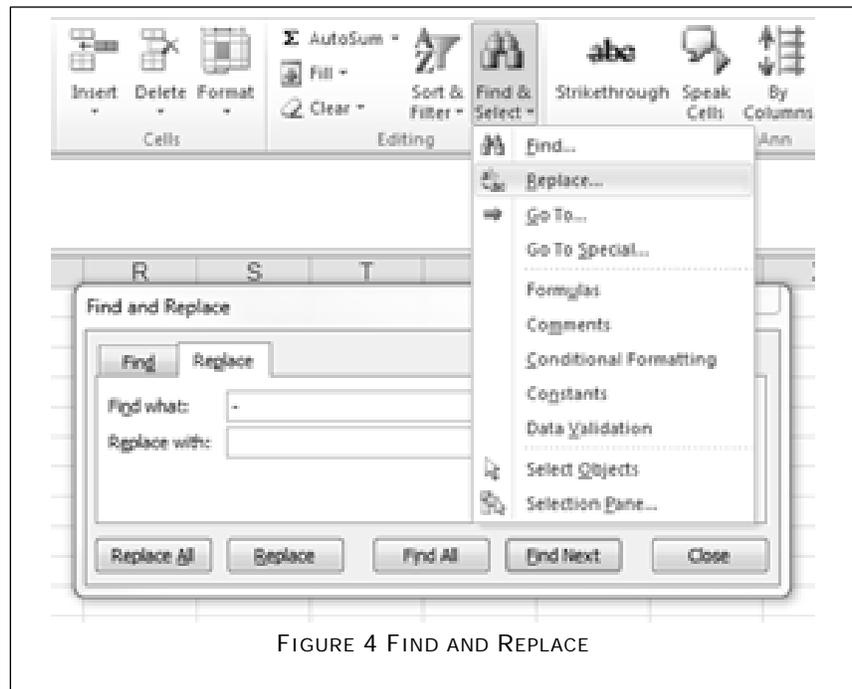

FIGURE 3 SSN FORMAT

1.3.1 Find and Replace

If there are dashes or hyphens in the SSN, remove them.

- Select *Column A*

- Go to *Find and Select* on the *Home* tab on the right side of the screen (Figure 58)

- Select *Replace* from the drop-down list

- Type a *dash (-)* in the *Find what* field

- Leave the *Replace with* field blank

- Select *Replace All*. Select *Close.*

FIGURE 4 FIND AND REPLACE

1.4 Format Date of Birth

- Select Column D. (DOB)

- Right click and select Format Cells. Select Custom and enter mm/dd/yyyy under the word Type (Figure 59).

FIGURE 5 FORMAT DOB
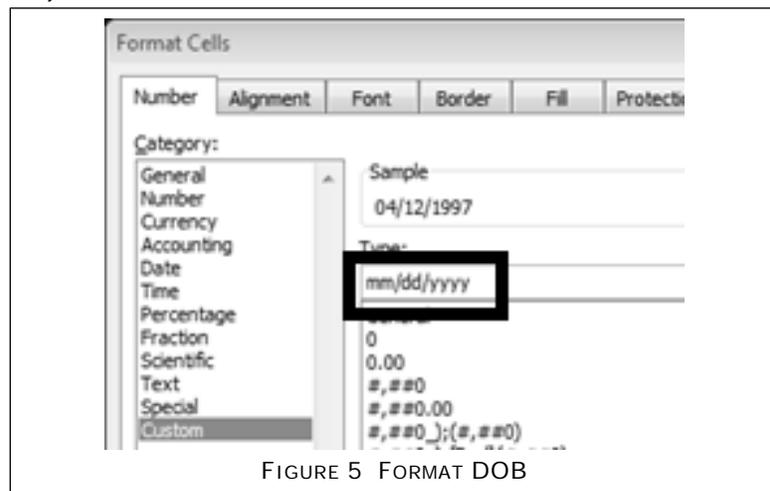
1.5 Format CE ID

- Select *Column F* (CE ID) .

- Right-click and select *Format Cells*. Select *Special > Zip Code (*Figure 60*).*

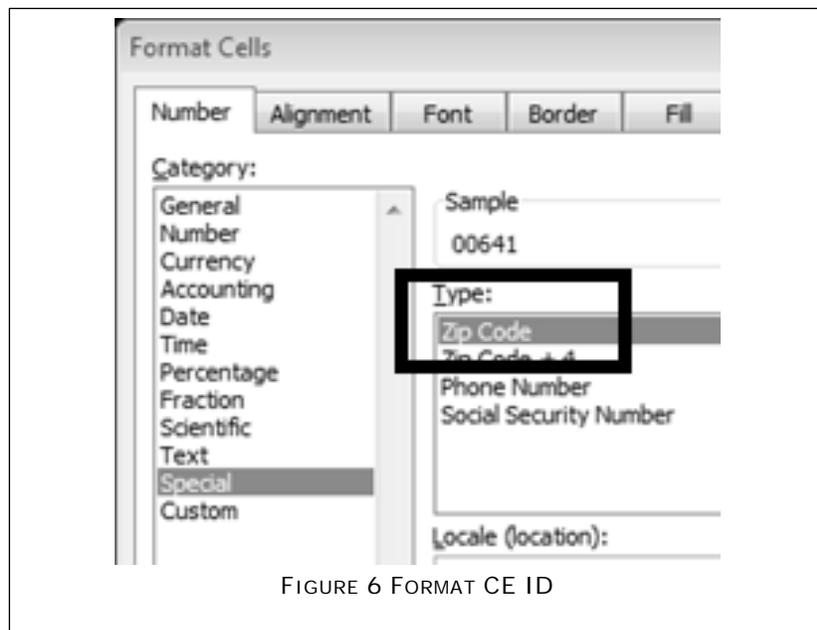- Note: You may have to change the locale to English (U.S.) to get the 5-digit zip code.

FIGURE 6 FORMAT CE ID