

# Understanding your **Discipline Services** Import Template

Below is a legend (key) that explains what each of the headers in the Discipline Services Import Template are, as well as how to properly enter the information. Once the discipline information has been entered into the template, the template is then uploaded into EdPlan by uploading the document through the Administrator tab and using the Upload New Data button.

The screenshot shows the EdPlan Administrator interface. The top navigation bar includes the EdPlan logo and several menu items: STUDENTS, MY ACCOUNT, REPORTS, TOOLS, ADMIN (highlighted with a red circle), and PEPPER. Below this is a secondary navigation bar with tabs: DISTRICT INFO (selected), DISTRICT CALENDAR, SUMMARY, SCHOOLS, SYSTEM MENU, USERS, INACTIVE USERS, USER TYPES, USER TYPE ASSIGN, and DISTRICT SUMMARY DATA. The main content area displays the 'REFERENCE SYSTEM ADMIN / DISTRICT INFO' form. The form contains the following fields:

- School System Name: REFERENCE SYSTEM
- School Year: 2022-2023
- School System Code: RCAPCG01
- Federal Tax ID Number: (empty)
- Address: 123 PCG Way
- City, State, ZipCode: Oklahoma City
- City, State, ZipCode: OK
- City, State, ZipCode: 12345
- E-Mail Address: (empty)
- Phone Number: 6089034504
- Fax Number: (empty)
- Time Zone: US/Eastern (GMT -05:00 / -04:00)
- School System NPI Number: 1104054725
- EasyFax Number: 877-892-7251
- School System OHCA District ID Number: 100688200A

At the bottom of the form, there is a section for 'EasyFAX Pages Used in Current Month:' followed by a series of dots. A green button labeled 'UPLOAD NEW DATA' is located to the right of the Fax Number field and is also highlighted with a red circle.

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After clicking the Upload New Data Button, click the Choose File button, and select the discipline file from your computer to upload the file to EdPlan. Leave the box unchecked to upload the data, and be sure to insert your email to receive a notification about the status of the discipline upload. If you choose to upload multiple discipline service files, be sure to only update dates that services were not provided. If services were provided for each discipline event, then there is no need to add other dates.

The screenshot shows the EdPlan interface with a navigation bar at the top containing 'STUDENTS', 'MY ACCOUNT', 'REPORTS', 'TOOLS', 'ADMIN', and 'PEPPER'. Below this is a secondary navigation bar with 'DISTRICT INFO', 'DISTRICT CALENDAR', 'SUMMARY', 'SCHOOLS', 'SYSTEM MENU', 'USERS', 'INACTIVE USERS', 'USER TYPES', 'USER TYPE ASSIGN', and 'DISTRICT SUMMARY DATA'. The main content area has a breadcrumb trail 'ADMIN / DISTRICT INFO' and a user identifier 'okaggregateiep'. The central text reads: 'Please provide a file containing data in the proper format. The file may be a plain text file, with fields separated by TAB characters, and including a header line with the field names. The file may also be an Excel spreadsheet file, which can contain multiple sheets - each sheet should contain a header line containing field names. One or more of these files may be contained within a zip file that can be uploaded at once. Documents and Pictures imports require this format, where the zip file will contain the import file as well as the Document or Picture files that should be associated with the Students.' Below this is a form with a 'File to upload:' label and a 'Choose File' button circled in red. A callout box with the text 'Leave unchecked!' and an arrow points to the 'Just upload the file, don't import data' checkbox, which is currently unchecked. The form also includes a 'Name of Field Translation Definition file:' field with a placeholder 'you don't know what this is)' and an '(leave empty if)' note, and an 'E-mail Address for Notification:' field with the value 'Jiali.Grellner@sde.ok.gov'. At the bottom, a note states: 'Default schedule time is tonight at midnight, unless the file being imported is smaller than 10000000 bytes. If the E-mail Address field is empty, notification will be sent to Jiali.Grellner@sde.ok.gov.' An 'UPLOAD THE FILE' button is located at the bottom of the form.

**Once this data is uploaded, it is extremely difficult to alter or correct the uploaded data. Corrections will have to be made for students on an individual basis. The district will be held responsible for all reported data.**

**State Code:** This refers to the child's State Testing Number (STN). Please enter the STN of the child that is receiving discipline in this field.

**Student Code:** The student's local identification code as it appears in your SIS (Student Information System). This code could be numeric or alphanumeric (combination of letters and numbers).

**Last Name:** The last name of the child. This should be entered with proper capitalization (capitalized first letter, with lowercase letters following), and no spaces before or after the name. An example of this is as follows:

Barnes

Please enter the last name of the child receiving discipline in this field.

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**First Name:** The first name of the child. This should be entered with proper capitalization (capitalized first letter, with lowercase letters following), and no spaces before or after the name. An example of this is as follows:

Jonathan

Please enter the first name of the child receiving discipline in this field.

**Date of Birth:** The child's birthday. Please enter this date in mm/dd/yyyy format (e.g., 02/26/2018).

**Custom (Discipline Services Provided):** Displays whether or not services were provided over the course of the discipline event. If yes, type Yes with a capital Y and no spaces afterwards (i.e., do not type 'Y', or 'yes', type Yes). If no, type No with a capital N and no spaces afterwards (i.e., do not type, 'N' or 'no', type No).

**Custom (Discipline Services Provided Text):** If services were **not** provided, please enter the individual dates in mm/dd/yyyy format (e.g., 02/26/2018; 02/27/2018; 02/28/2018).