

Family Import Sheet

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Family Import Sheet: The Family Import Sheet is used to import families into the Platform. Importing families into the Platform includes the children, parents, emergency contacts, and balances for both the child and any associations to third party agencies. **Required fields are noted in red.**

To download this spreadsheet, click on the following link: [import_template.xls](#) 

After completing this spreadsheet, return the files to to your account manager or customer service representative.

Child Tab- This tab is where you would enter each child's detail that should be added to your system. Each child should have their own row. Children need to have a unique child ID and should only display once on your import.

	A	B	C	D	E	F	G	H	I	J
1	CenterName	ChildID	FamilyID	FirstName	MiddleName	LastName	PreferredName	Birthday	Gender	EnrollmentDate
2	0636	0636	063627159	Daryl		Robbins		1/18/2009	MALE	1/18/2010
3	0636	063610189	063623339	Laurie		Bush		1/18/2011	FEMALE	8/8/2011
4										
5										

- **CenterName:** The Center Name column is the name of the center the child is enrolled at. This field **MUST** match the center the children belong to's internal ID (go to the center level and select the home menu, then select general to update the field).
- **ChildID:** The ChildID column is the identification number assigned to the child, there must be a unique number for each child.
- **FamilyID:** The FamilyID column is the identification number assigned to the family. All children in the same family **MUST** have the same family ID number.
- **FirstName:** The FirstName column is the first name of the child.
- **MiddleName:** The MiddleName column is the middle name of the child.

- **LastName:** The LastName column is the last name of the child.
- **PreferredName:** The PreferredName column is the name the child prefers to be called.
- **Birthday:** The Birthday column is the date the child was born.
- **Gender:** The Gender column is the gender of the child. Enter either MALE or FEMALE in the column.
- **EnrollmentDate:** The EnrollmentDate column is the date the child was enrolled into the center.

K	L	M	N	O	P	Q	R	S	T	U	V
Discharge Date	Address1	Address2	City	State	Zip	ChildStatus	Phone	PhoneType	Email	Allergies	StartDate
	445 Livemois		Rochester Hills	MI	48307	Active	248-841-1940		wrobbins@cirrusgroup.com		1/18/2010
	444 Livemois		Rochester Hills	MI	49506	Active	248-841-1967		info@cirrusgroup.com		8/8/2011

- **DischargeDate:** The DischargeDate column is the date the child was discharged or withdrawn from the center. If the child has not been discharged or withdrawn, this column should be blank.
- **Address1:** The Address1 column is the street address for the child's home
- **Address2:** The Address2 column is the additional information for the child's address, including suite, apartment or floor number.
- **City:** The City column is the city the child lives in.
- **State:** The State column is the state the child lives in.
- **Zip:** The Zip column is the zip code the child lives in.
- **ChildStatus:** The ChildStatus column is the current status of the child in the Platform. A child's status can be listed as Active, Pending or Withdrawn.
- **Phone:** The Phone column is the telephone number associated to the

child.

- PhoneType: The PhoneType column is the type of phone number associated to the child.
- Email: The Email column is the email address associated to the child.
- Allergies: The Allergies column is the allergies the child has. To add multiple allergies for a child, separate each allergy by a comma.
- StartDate: The StartDate column is date the child started in the center.

Parent Tab- The parent tab would be where you place parent or guardian information. Each parent only needs to display one time per family. Each parent should have their OWN row. As long as the parent is tied to one of the children the family will load correctly.

	A	B	C	D	E	F	G	H	I
1	CenterName	ChildID	ParentID	ChildFirstName	ChildMiddleName	ChildLastName	ParentFirstName	ParentMiddleName	ParentLastName
2	0636	0636	063627159	Wade		Robbins	Garth		Robbins
3	0636	063610189	063623339	Laurie		Bush	Jim		Bush
4									
5									

- CenterName: The CenterName column is the name of the center the child is enrolled at.
- ChildID: The ChildID column is the identification number assigned to the child.
- ParentID: The ParentID column is the identification number assigned to the parent.
- ChildFirstName: The ChildFirstName column is the first name of the child.
- ChildMiddle: The ChildMiddleName column is the middle name of the child.
- ChildLastName: The ChildLastName column is the last name of the child.

- **ParentFirstName:** The ParentFirstName column is the first name of the parent.
- **ParentMiddleName:** The ParentMiddleName column is the middle name of the parent.

I	J	K	L	M	N	O	P	Q	R	S	T
ParentLastName	Address1	Address2	City	State	Zip	HomePhone	OfficePhone	CellPhone	Fax	OtherPhone	Email
Robbins	445 Livernois		Rochester Hills	MI	48307	248-841-1940					wrobbins@cirrusgroup.com
Bush	444 Livernois		Rochester Hills	MI	49506	248-841-1967					info@cirrusgroup.com

- **ParentLastName:** The ParentLastName column is the last name of the parent.
- **Address1:** The Address1 column is the street address for the parent's home.
- **Address2:** The Address2 column is the additional information for the parents' address, including suite, apartment or floor number.
- **City:** The City column is the city the parent lives in.
- **State:** The State column is the state the parent lives in.
- **Zip:** The Zip column is the zip code the parent lives in.
- **HomePhone:** The HomePhone column is the home telephone number for the parent.
- **OfficePhone:** The OfficePhone column is the office telephone number for the parent.
- **CellPhone:** The CellPhone column is the cellular telephone number for the parent.
- **Fax:** The Fax column is the fax machine number for the parent.

- OtherPhone: The OtherPhone column is any additional telephone number for the parent.
- Email: The Email column is the email address for the parent.

U	V	W	X	Y	Z	AA
EmployerName	EmployerAddress1	EmployerAddress2	EmployerCity	EmployerState	EmployerZip	PickUpCode
						11E

- EmployerName: The EmployerName column is the name of the employer for the parent.
- EmployerAddress1: The EmployerAddress1 column is the street address for the parent's employer.
- EmployerAddress2: The EmployerAddress2 column is the additional information for the parent's employer, including suite, apartment or floor number.
- EmployerCity: The EmployerCity column is the city the parent's employer is located in.
- EmployerState: The EmployerState column is the state the parent's employer is located in.
- EmployerZip: The EmployerZip column is the zip code the parent's employer is located in.
- PickupCode: The PickupCode column is the PIN number a parent uses to check a child into and out of the center using either a computer or touch screen program.

Contacts Tab- Contacts are optional, if you would like to upload contact details be sure each contact has a unique ID and is tied to at least one of the children IDs. Required fields if contacts are to be uploaded are in blue below.

- Contact MiddleName: The ContactMiddleName column is the middle name of the contact for the child.
- ContactLastName: The ContactLastName column is the last name of the contact for the child.
- Email: The Email column is the email address for the contact.
- Phone: The Phone column is the telephone number for the contact.
- PhoneType: The PhoneType column is the type of phone number, such as Home, Work or Cell phone for the contact.
- Address1: The Address1 column is the street address for the child's home.
- Address2: The Address2 column is the additional information for the child's address, including suite, apartment or floor number.
- City: The City column is the city the child lives in.
- State: The State column is the state the child lives in.
- Zip: The Zip column is the zip code the child lives in.
- FamilyDoctor:
- FamilyDentist:
- FamilyHospital:

Balance Tab- This tab is used to load balance forwards into the system. This process is typically completed after going live. Required fields are noted in blue below.

	A	B	C	D	E	F	G	H
1	CenterName	ChildID	ChildFirstName	ChildMiddle	ChildLastName	ParentID	SponsorNames	LastBalance
2	0636	0636				063627159	Wade Robbins	202.00
3								
4								
5								
6								

- CenterName: The CenterName column is the name of the center the child is enrolled at.
- ChildID: The ChildID column is the identification number assigned to the child.

- ChildFirstName: The ChildFirstName column is the first name of the child.
- ChildMiddle: The ChildMiddleName column is the middle name of the child.
- ChildLastName: The ChildLastName column is the last name of the child.
- ParentID: The ParentID is the identification number for the parent.
- SponsorNames: The SponsorNames column is the name of the parent or sponsor for the balance.
- LastBalance: The LastBalance column is the last outstanding balance owed by the parent or sponsor.

Agency Tab- This tab is used to load third party balances to child records. This is typically completed after going live. Required fields are noted below in blue.

	A	B	C	D	E	F	G	H	I	J
1	CenterName	AgencyName	AgencyID	ChildID	ParentID	SponsorNames	Spo_LastBalance	Age_Balance	From Date	To Date
2	0636	FIA	68	063610975	063629615	Wade Robbins	211.44	1128.25		
3	0636	FIA	68	063612522	063617482	Jim Bush	75.05	776.04		
4										
5										
6										

- CenterName: The CenterName column is the name of the center the child is enrolled at.
- AgencyName: The AgencyName column is the name of the third party agency assigned to the child. (This is found on the setup > third party tab)
- AgencyID: The AgencyID column is the identification number assigned to the third party agency. (This is found on the setup > third party tab)
- ChildID: The ChildID column is the identification number for the child that has the third party agency association.
- ParentID: The ParentID column is the identification number assigned for the parent of the child.
- SponsorNames: The SponsorNames is the name of the parent responsible for the child's outstanding balance that is applied to the

family.

- **Spo_LastBalance:** The Spo_LastBalance is the amount outstanding from the parents for the child's billing statement.
 - **Age_Balance:** The Age_Balance is the amount outstanding from the third party agency for the child's billing statement.
 - **From Date:** The starting date for the third party agency's balance. This is used if the third party agency is going to import a past due amount for a specific billing period.
 - **To Date:** The ending date for the third party agency's balance. This is used if the third party agency is going to import a past due amount for a specific billing period.
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