Preparing for the Upcoming School Year with CurbSmart

This guide provides information on preparing your student data for CurbSmart for the upcoming school year. It also includes tips for printing and distributing placards.

Step 1: Prepare the Student Data File

What information should be included in the student data file?

We use the student data file, provided by your school, to import students into CurbSmart and assign a number that corresponds to their hangtag, i.e. placard number. While all fields are not required for the import, it is helpful to include as much information as possible according to your school's setup.

The student file should be sent to us as a **single-paged spreadsheet** in an **.xlsx or .csv file format** and should include the following fields as *separate* columns (*denotes required fields) (column order does not matter):

- **Student ID Number*** - main student number from SIS,
- **Student First Name*** - Must be in its own column to import,
- **Student Last Name*** - Must be in its own column to import,
- **Student Birthdate*** (MM/DD/YYYY),
- **Student Grade*,**
- **Family ID** (if your SIS has this field, it is the recommended option to group siblings, if desired),
- **Classroom** - can be teacher name, room #, or code,
- **Contact Number** - main phone number of parent/guardian,
- **Parent First Name** (any approved parent/guardian) – One parent first name, must be in its own column to import,
- **Parent Last Name** – One parent last name, must be in its own column to import,
- **Parent 2 First Name** – One parent first name, must be in its own column to import,
- **Parent 2 Last Name** – One parent last name, must be in its own column to import,
- **Street Address** – this is an optional field, but if provided, it can be used to group siblings and verify adults,
- **City,**
- **State,**
- **Zip,**
- **Bus Number** - if your school uses the Bus feature in CurbSmart, include the bus number or name. This field can also be provided later,
- **Placard Number** – Only include this column if you'd like our team to assign placard numbers to students according to this column rather than having CurbSmart auto-assign placard numbers to students during the import.
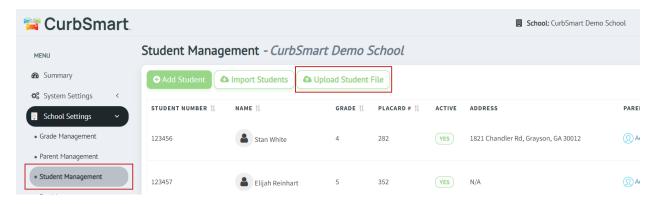
Grouping Siblings: Depending on the information provided in the student file, we will attempt to group students that are siblings onto the same placard number using either the Family ID, parent/guardian last name and street address (or contact number, if no address). This is optional, so if you prefer that all students are assigned to their own placard number, you do not have to group siblings and provide this additional information.

Step 2: Upload the Student Data File

At least 1-2 weeks prior to the date you'd like to distribute placards to families, you will need to upload the student data into CurbSmart. Once the file has been uploaded, a notification is sent to the CurbSmart Team. The CurbSmart Team will begin to import the data into CurbSmart and send you an email confirmation when complete.

Upload the student data file by logging into CurbSmart with your school admin account, then go to the Student Management tab, found under School Settings. Click the 'Upload Student File' button.

Before uploading, you'll need to complete the questionnaire.

The responses you provide in this questionnaire will give the CurbSmart Team the information needed to properly import your data. Below are the questions from the questionnaire:

1. What is your proposed school start date for the 2024-2025 school year?
2. Please enter the name of the primary contact for CurbSmart at your school.
3. Please enter the best phone number to reach you in case we have questions regarding the student import.
4. Please enter your email address. We'll send a confirmation email to the email address you provide when the student import is complete.

5. We recommend assigning new placard numbers to all students each school year to keep the information more secure. Do you want us to assign new placard numbers to all students?

    a. Yes, assign new placard numbers to all students.

    b. No, keep the same placard numbers for returning students.

    c. Do not assign placard numbers. I will provide the placard numbers in the student file OR assign placard numbers manually after students are imported.

    d. Help me decide. (A member of our team will reach out to assist).

If you choose Option A to **assign new placard numbers to all students**, CurbSmart will clear the data for the previous school year. The new student data will be imported into CurbSmart, and students will be assigned to new placard numbers.

If you choose Option B to **keep the same placard numbers for returning students**, CurbSmart will assign new placards numbers to new, incoming students, and any existing students will keep their same numbers. Students who are no longer enrolled will be removed. Please note: This option can take longer to complete.

If you choose Option C to **not assign placard numbers**, then you can either include a column for placard number in the student file, and we will assign students to the placard number you provided. OR, if you don't provide a placard number column in the file, then the CurbSmart team will not assign students to placard numbers. You will need to do that manually after the import.

6. Would you like us to group siblings onto the same placard number? We will either use the Family ID (if provided) OR the Guardian Last Name and Street Address (or Contact Number) to determine siblings. If these are not provided in the student file, we will not be able to group siblings.

    a. Yes, group siblings using the Family or Household ID number that I have provided in the student file.

    b. Yes, group siblings using the Guardian Last Name and Street Address (or Contact Number) as provided in the file.

    c. No, do not group siblings. All students will receive their own placard numbers.

If you plan on giving parents access to the CurbSmart Parent Portal (or have already done so), then you should select either options A or B to group siblings onto the same placard number.

7. Please enter any additional instructions, comments, or questions for our team regarding the student import.

Once the students have been imported into CurbSmart for the new school year, you will receive an email notification from the CurbSmart Team that will include some more instructions on how to get your CurbSmart system ready for the new school year. In the event you need us to import another student file, you can submit that file through the Upload Student File button. You should not need to complete the questionnaire again.

Step 3: Print and distribute placards to families.

Please watch the short tutorial "How to Design and Print Placards" on our Support website https://nutrilinktechnologies.com/support/curbsmart-help-administrators/ (password is **nlhelp**). This video will explain how to create a new placard and print them from CurbSmart.

If you already have a placard template in CurbSmart, then you can make any updates, like changing the school year, and print. You don't need to design a new template.

You can print placards by classroom(s), grade(s), pickup type, or for a specific student. You can choose to print one copy per page, or multiple copies per page, depending on your placard template.

If you have any questions or need assistance with designing or printing placards, please reach out to our support team at support@n-ltech.com.

Step 4: Add new teachers as users and change filters for existing teachers, as needed.

Please watch the short tutorial "Overview of User Management" on the CurbSmart Support site https://nutrilinktechnologies.com/support/curbsmart-help-administrators/ (password is **nlhelp**) to learn how to add new users. You'll also learn how to filter their views, so they only see the students they need to.

Existing teachers are left unchanged from year to year. They can use the same username and password from year to year. However, you may need to update their filter each year to account for their new grade or classroom, if it has changed.

Tip: You can add new teachers and make changes to filters at any time throughout the new school year.

We look forward to a wonderful new school year! Thank you for your continued support and trust in CurbSmart. We are grateful to have you as our customer!