eScholar®

Personalized education starts at eScholar.

User Guide

eScholar Uniq-ID®
Version 11.0

2019-2020

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ABOUT THE APPLICATION

Purpose

The eScholar Uniq-ID® (eUID) application is designed for educational agencies to assign and maintain unique statewide student identifiers (also referred to as "unique identifiers"). The term "person" is inclusive of Students, Staff Members, and other student categories.

Capabilities

The eUID application allows users to:

- **Assign a unique identifier** for every student in pre-kindergarten, kindergarten, elementary, and secondary public education depending on licensing.
- **Generate random State IDs** that are not constructed on any student demographic details of the student.
- **Identify and locate a student from the statewide eUID database** either using the State ID, Alias ID, student demographics (e.g., last name), or with a batch file.
- **Download unique identifiers** by batch or by location.
- **Search** by batch, agency name, or student name.
- **Claim student records who have transferred to a new school/district** and allow schools/districts to communicate with each other through emails generated by the application.
- **Multiple ways to submit student records** to the eUID application via batch mode, manual entry, Web Services, SIF, or Automatic File Processing.

Benefits

The eUID application provides users with numerous benefits including:

- **A powerful matching engine** that uses complex logic to match student records.
- **A tracking and logging process for all uploads/submissions of data** and updates to the data.
- **An easy-to-use interface** for all functionality within the application.
- **An organized and structured approach** to assigning unique identifiers.
- **Maintenance and troubleshooting** of unique identifiers.
- **Secure and role-based access.**

System Requirements

The application utilizes Adobe Acrobat and Microsoft Excel for reports provided in the application. Users should download Adobe Acrobat from http://get.adobe.com/reader/. Microsoft Excel or an Excel reader can be used.

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ABOUT THIS MANUAL

This manual is designed as a reference guide for the eScholar Uniq-ID® (eUID) application. It includes descriptions of components, stepped directions, and screenshots to assist with using the application. The manual includes detailed information on error messages, file formats and other application-specific details. Each major topic begins on a new page to make it easier to find information in this manual.

Screenshots

All screenshots provided throughout this documentation were produced using demonstration data.

Notes & Tips

The manual includes some notes and tips that are designed to highlight important information. The following Notes and Tips indicators are used:

NOTE: *This box mention things that require special attention. The symbol to the left indicates an important note to remember.*

TIP: *This box includes useful advice as the user works through the UID Application. The pointing hand always indicates a* ***TIP****.*

NOTE: *Some implementations may not use the term* ***State ID****. Certain implementations use other terms specific to that application (e.g., Unique ID). This change is seen on buttons and text labels throughout the application. These other terms may replace State ID in more locations in Version 6.x than in prior versions.*

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Definitions, Acronyms, and Abbreviations

- **State ID** – The internal student identifier generated by the eScholar Uniq-ID® application.
- **SIS** – Student Information System.
- **Local ID** – The identifier that is created by the source of the data. For example, if the data is generated by the SIS, the Local ID would be the internal identifier created by that SIS.
- **ID Assignment Process** – The eUID application's process of assigning IDs to student records. This process includes the following steps: (1) submitting a batch
  (2) validating the data (3) fixing data errors (4) assigning IDs (5) resolving near matches/matches (6) downloading IDs.
- **Match Probability:** The probability that two student records are the same student.
- **eScholar Uniq-ID®** – The eUID abbreviation is used throughout the application.
- **Assign Selected** – This button is available within the Near Match pages. The label on the button may vary by application. It may also be labeled Match.
- **Create New ID** - This button is available within the Near Match pages. The label on the button may vary by application. It may also be labeled No Match.
- **CDF** – This is used throughout the document to reference Customer Defined Fields.
- **AFP** – This is used throughout the document to reference Automatic File Processing.
- **Master Data** – This is the active record for the student and includes the ID and all of the latest data.
- **History Record** – When a master record is updated, the original data is moved to history and the new data becomes the master data. The application retains all history information for a student. Typically, data is updated when a record is submitted, unless the Authoritative Source feature is enabled. Please see Authoritative Source below.

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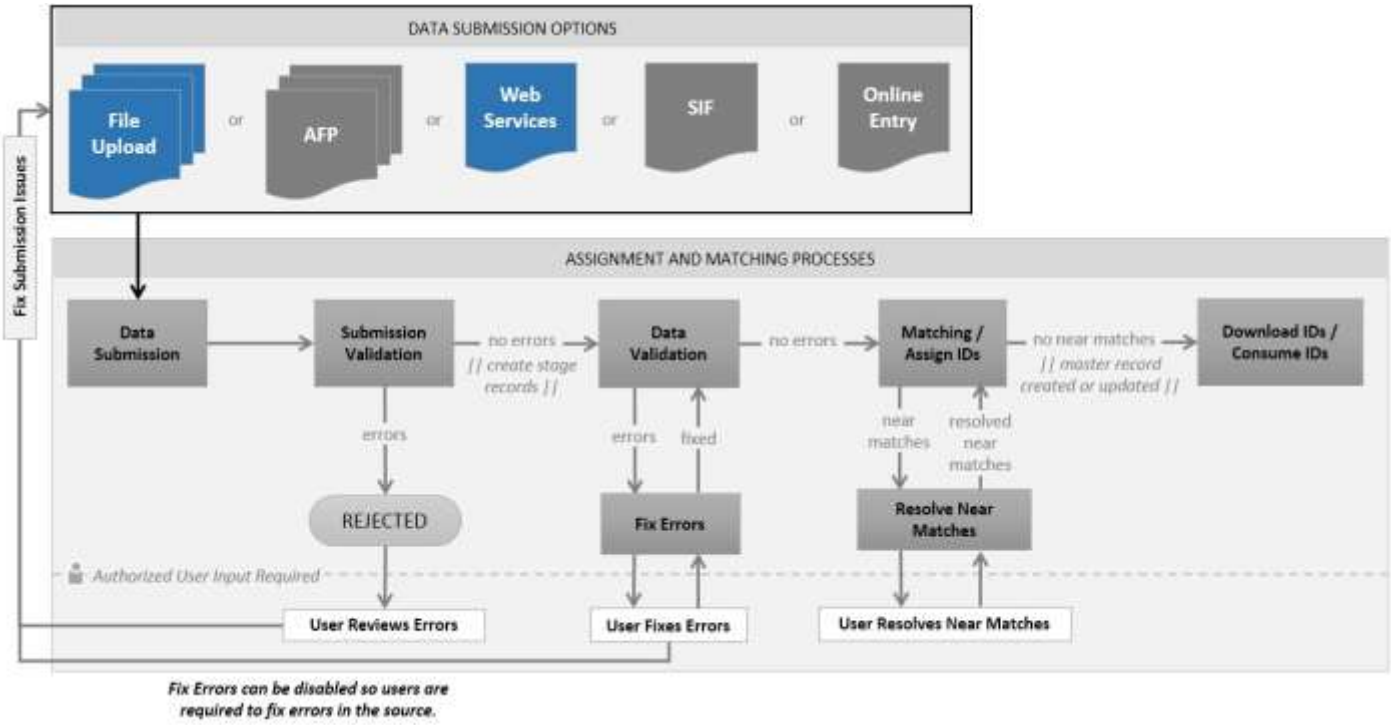
ID Assignment Process Overview

The ID Assignment Process within the eUID application consists of the following four distinct steps. Each step is modeled in the eUID application. Additional information regarding each step can be found in the corresponding sections noted below:

- **Step 1:** **SUBMIT student DATA, VALIDATE SUBMISSION, and FIX DATA ERRORS** *(Refer to Page 17 for more information)*
- **Step 2:** **ASSIGN IDs** *(Refer to Page 33 for more information)*
- **Step 3:** **RESOLVE NEAR MATCHES** *(Refer to Page 36 for more information)*
- **Step 4:** **DOWNLOAD IDs** *(Refer to Page 50 for more information)*



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Data Collection Timeline

Data is collected in several application systems during each school year. Most of the application systems are only open during scheduled data collection periods while others are open all throughout the school year with snapshots taken during the scheduled data collection periods.

Collection Periods	Collection Name	Application Systems
Always Open Collections		SPS, eScholar Uniq-ID, DirectMatch, SER, CIS
Fall Collections	Oct 1 MFP/IDEA	SPC, SIS, SER
	Oct 1 CLASS	SPC, SIS, CUR, PEP
	TSDL Fall	TSDL
	K-3 Assessment	SIS
Spring Collections	Feb 1 MFP	SPC, SIS, SER
	TSDL Spring	TSDL
	STS Mid-Year	STS
	CVR	CVR, SPC, SIS, CUR, PEP
End-Of-Year Collections	EOY	SPC, SIS, SER, AFR, PEP, STS

Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
eScholar Uniq-ID, eScholar DirectMatch, Special Education Reporting (SER), Sponsor Site (SPS), Compass (CIS)											
	Oct 1 MFP/IDEA SPC, SIS, HTS					**Feb 1 MFP** SPC, SIS, HTS					
	K-3 Assessment										
	Oct 1 CLASS SPC, SIS, HTS, CUR, PEP								**CVR** SIS, PEP, CUR		
	TSDL Fall					**TSDL Spring**					
STS End-Of-Year (Prior Year)						**STS Mid-Year**			**STS End-of-Year**		
								SPC, SIS, HTS End-Of-Year			
PEP End-Of-Year (Prior year)									**PEP End-of-Year**		
AFR End-Of-Year (Prior Year)											
Dropout Corrections (SIS EOY Prior Year**)**											

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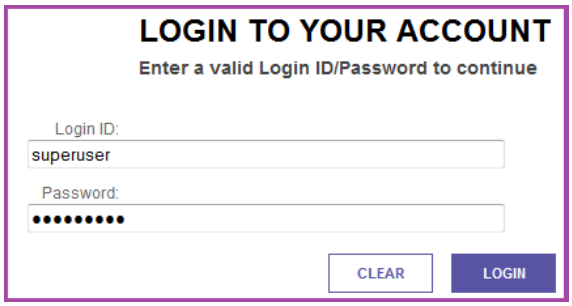
LOG IN

When logging into the eUID application, users should access the login URL and enter valid login information.

The steps to log into the application include:

1. Access the login URL.
2. Enter a Login ID and Password.
3. Click the LOGIN button.



NOTE: *Some users may not see or use the above login page. Rather, they are directed to the eUID application via another application (e.g., Department of Education main portal). In such a situation, users have to select the eUID application from a list of applications. They are then logged into the application without seeing the above page.*

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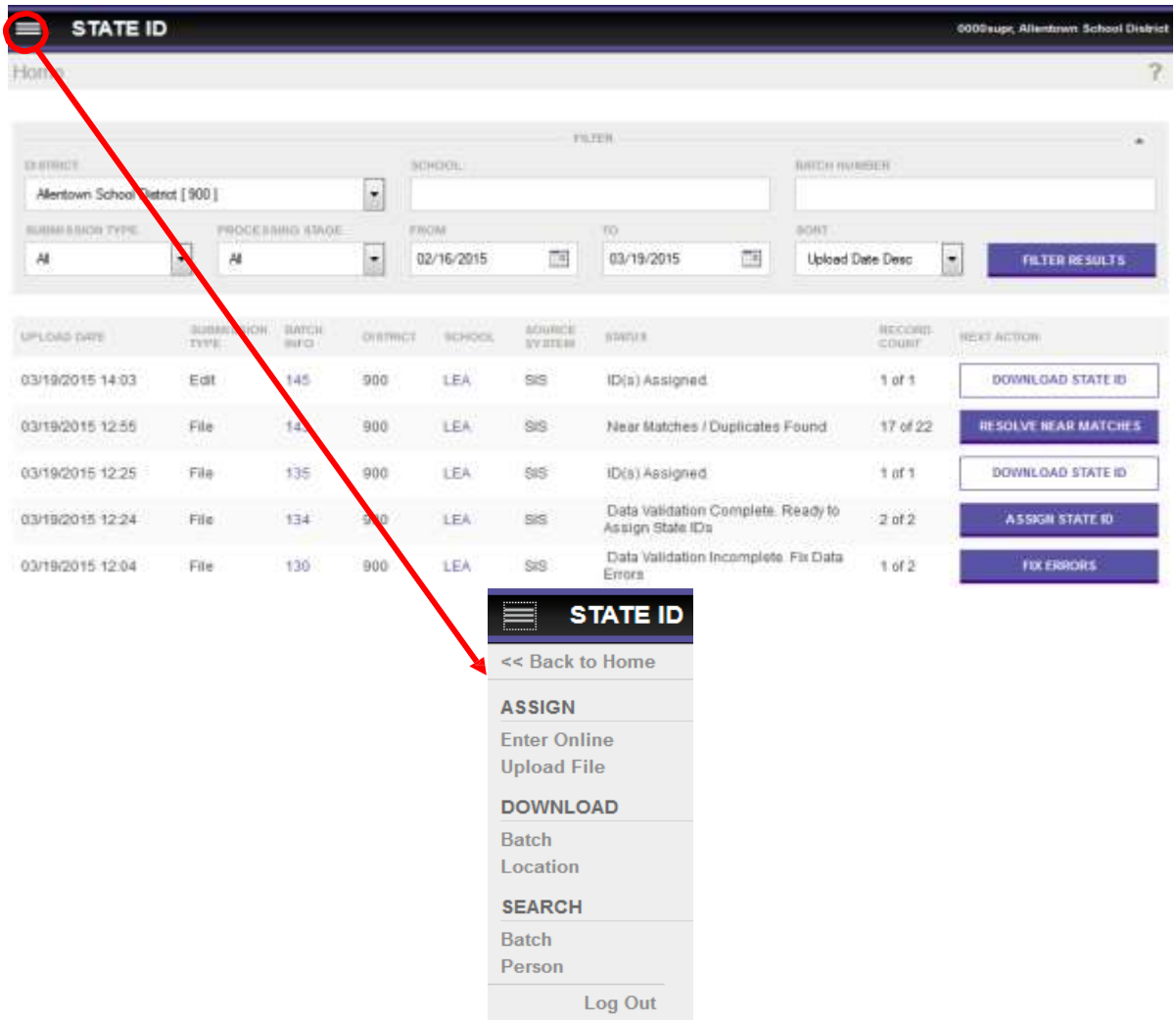
MAIN MENU & FEATURES OF THE APPLICATION

Main Menu

The Main Menu located in the top left corner of every page.



The Main Menu contains links that allow users to access the application features including uploading student batch files, entering individual student records, performing student searches, downloading various types of output files, claiming transferring student records, and exiting the application. These menu options are based on system roles and assigned privileges. Some of the menu items described throughout this manual may not be available for all users.

> ***TIP:*** *Users should not use the* ***REFRESH****,* ***BACK****, or* ***FORWARD*** *browser buttons with the eUID system. There are links on every page to direct the user to other screens.*

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FEATURES

The core features that are included in the eUID application, which can all be accessed from the Main Menu, are outlined below. For admin features, please refer to the Admin Guide:

HEADER *(Refer to Page 14 for more information)*

The Header is displayed at the top of every page in the application and contains the Application Name, Page Name, Current Location that the user has selected, and link to Help content if it is available.

HOME PAGE *(Refer to Page 1 for more information)*

The Home Page provides users with easy access to view previously submitted batches, filter batches, find batches, and perform next actions. It is accessed by clicking on the Main Menu icon and the "<< Back to Home" link from any page in the application.

ASSIGN

ENTER ONLINE *(Refer to Page 29 for more information)*

This feature provides users the ability to input the information for one student at a time online and assign an ID.

UPLOAD FILE *(Refer to Page 17 for more information)*

This feature allows users to upload a student Batch File into the eUID application for ID assignment.

DOWNLOAD

BATCH *(Refer to Page 92 for more information)*

This feature provides users with the ability to extract and download seven different types of output files from the eUID application:

- IDs Assigned
- Errors to Fix
- Near Matches/Duplicates to Resolve
- Canceled
- Rejected
- Fixed Records
- Near Match Details

LOCATION *(Refer to Page 101 for more information)*

This feature provides users with the ability to download student records for a specific location and allows the user to select options during the download process. These options include the field delimiter, field qualifier, date format, and whether or not to include the header/footer.

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SEARCH

STUDENT *(Refer to Page 52 for more information)*
This feature allows a user to search for student records through an online interface. This function can be used to verify the details of a student already in the eUID application.

> ***NOTE:*** *Depending on the needs of the specific implementation, the word "Person" may have been configured by your organization to be displayed as something other than "Person". For instance, the word "Person" may have been changed to be displayed as "Student" throughout the application, in which case, instead of this feature being displayed as "Person Search", it would be displayed as "Student Search" in the Main Menu.*

BATCH *(Refer to Page 84 for more information)*
This feature allows a user to search for student records with a batch file.

CLAIMING PROCESS *(Refer to Page 105 for more information)*
This feature provides users the ability to handle situations when a student transfers from one school/district to another school/district within the state. It provides a mechanism for the schools involved to communicate with each other through automatic emails regarding the transferring student.

LOG OUT *(Refer to Page 125 for more information)*
This link allows users to log out of the application. By using the Log Out link, all sessions for the user are closed.

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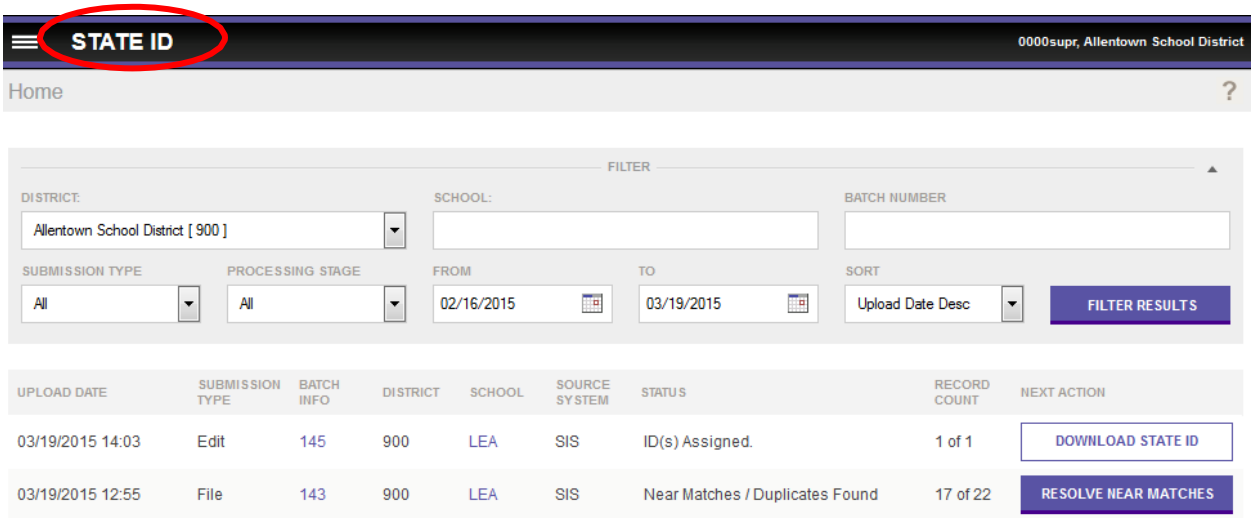
HEADER

In addition to the Main Menu, the page Header also includes:

1. Application Name
2. Page Name
3. Current Location
4. Help

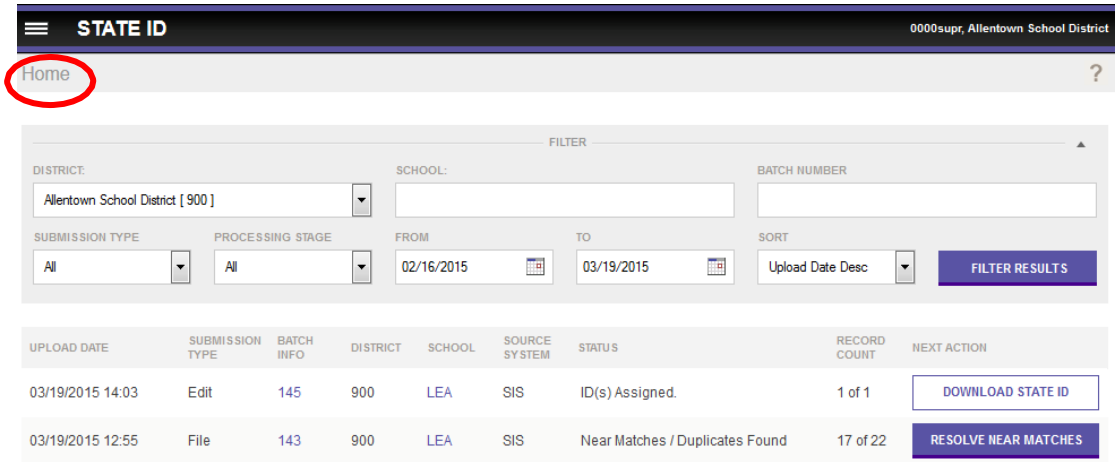
Application Name

The Application Name is displayed on every page next to the Main Menu link. This Application Name is the name that your organization has decided to call the eUID application.



Page Name

The Page Name is displayed on every page under the Main Menu link and the Application Name.



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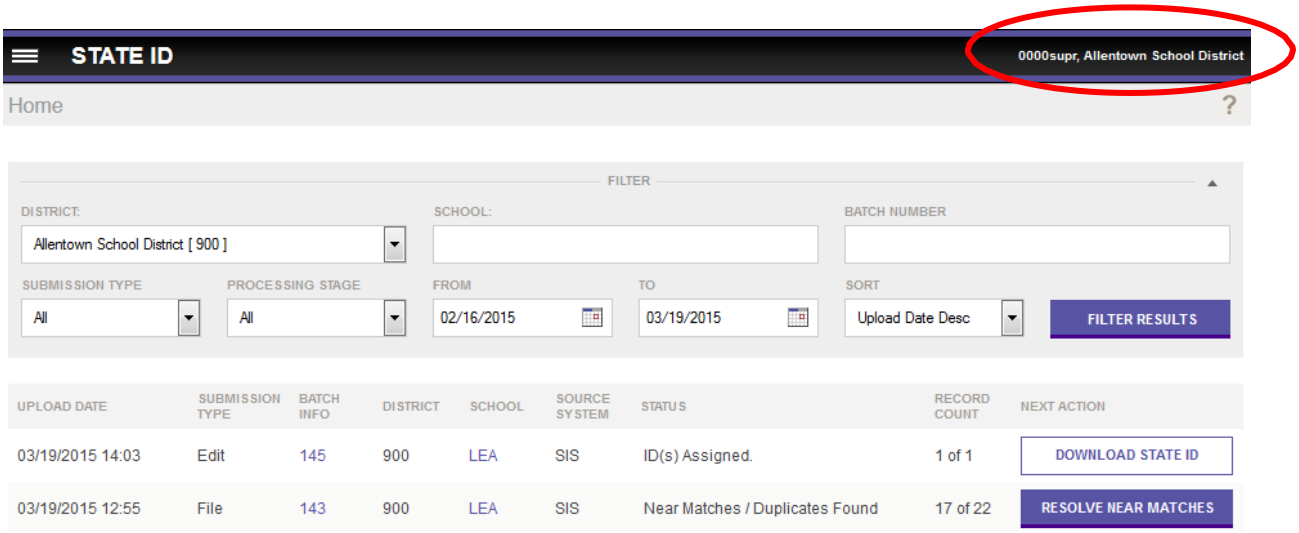
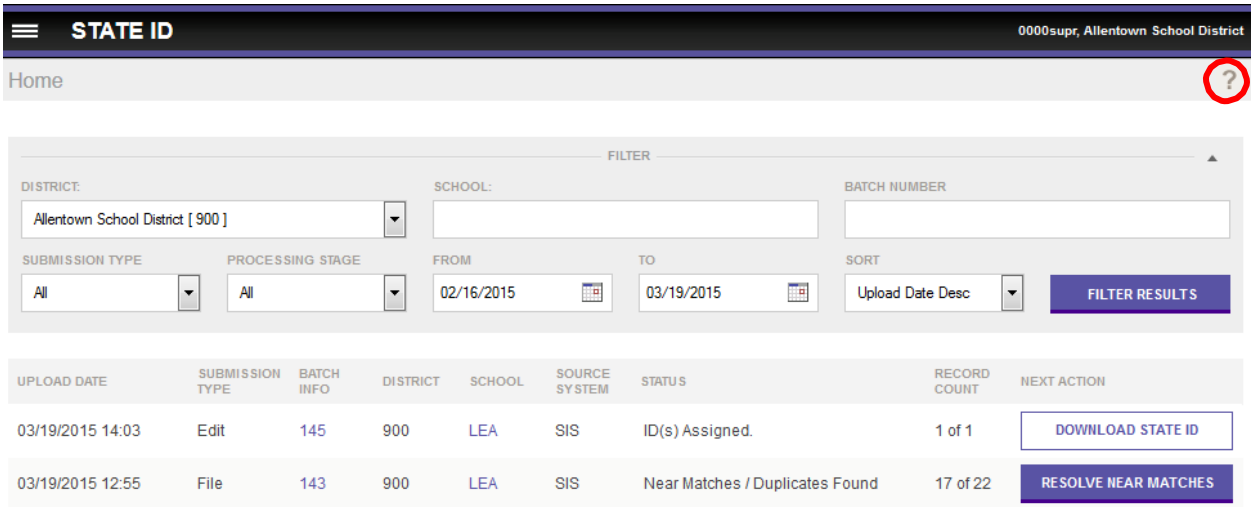
Current Location

The user's location will always be displayed in the top right hand corner of every page, above the Help (?) icon.



Getting Help

The Help (?) icon will always be displayed in the top right hand corner of every page, under the Current Location, if the page has help content available.



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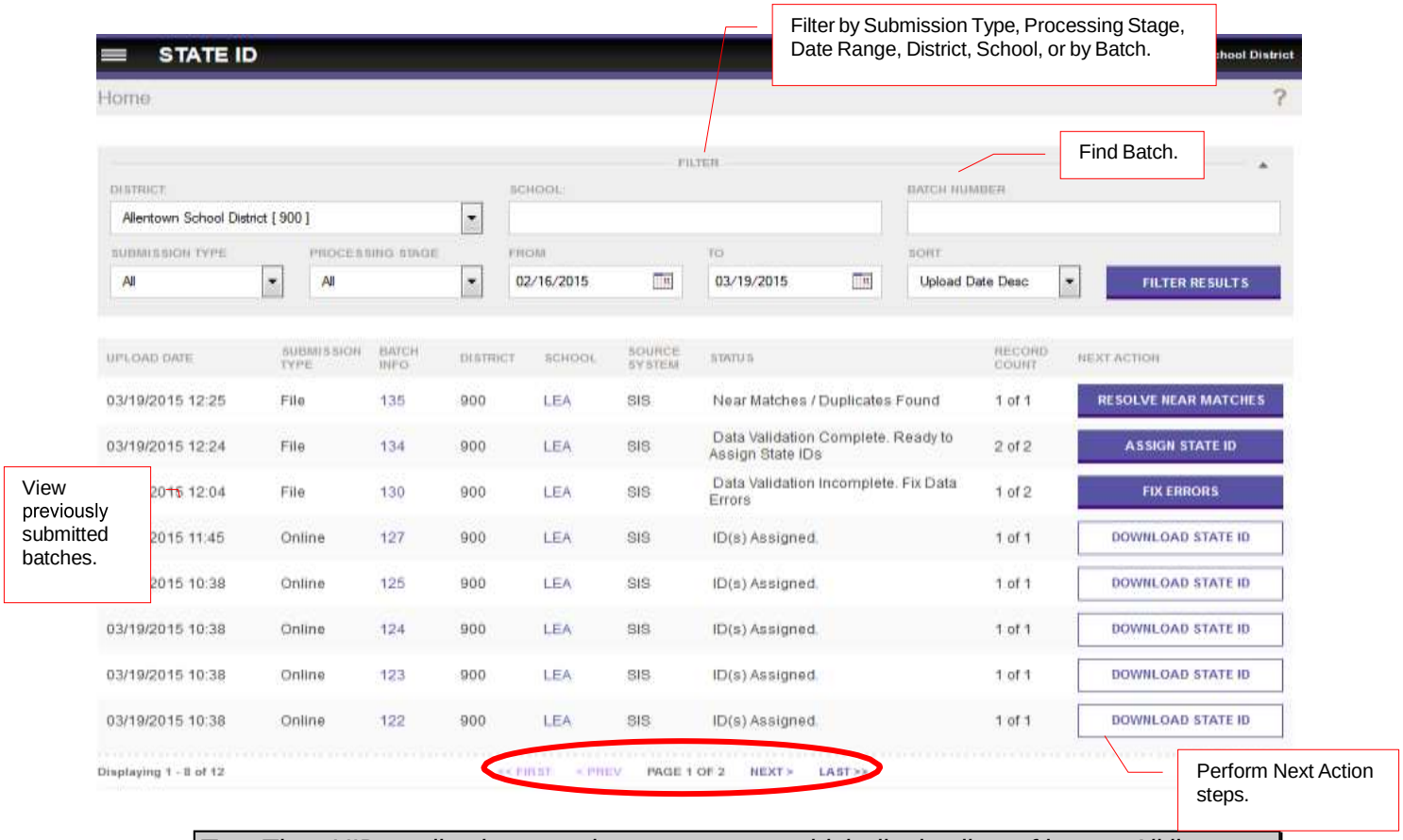
HOME PAGE

About the Home Page

Once a user successfully logs into the eUID application, the Home Page will be displayed. The Home Page is also accessible from every page by clicking the "Main Menu" icon ▤, and then selecting the "<< Back to Home" link at the top.

The Home Page allows users to:

- View previously submitted batches.
- Filter batches.
- Find batch.
- Perform Next Action steps.



***TIP:** The eUID application contains many pages which display lists of items. All lists are page loaded and may not show all records on one page. Users can navigate to other pages in a list using the **FIRST**, **PREV**, **NEXT**, and **LAST** buttons on the bottom of each list.*

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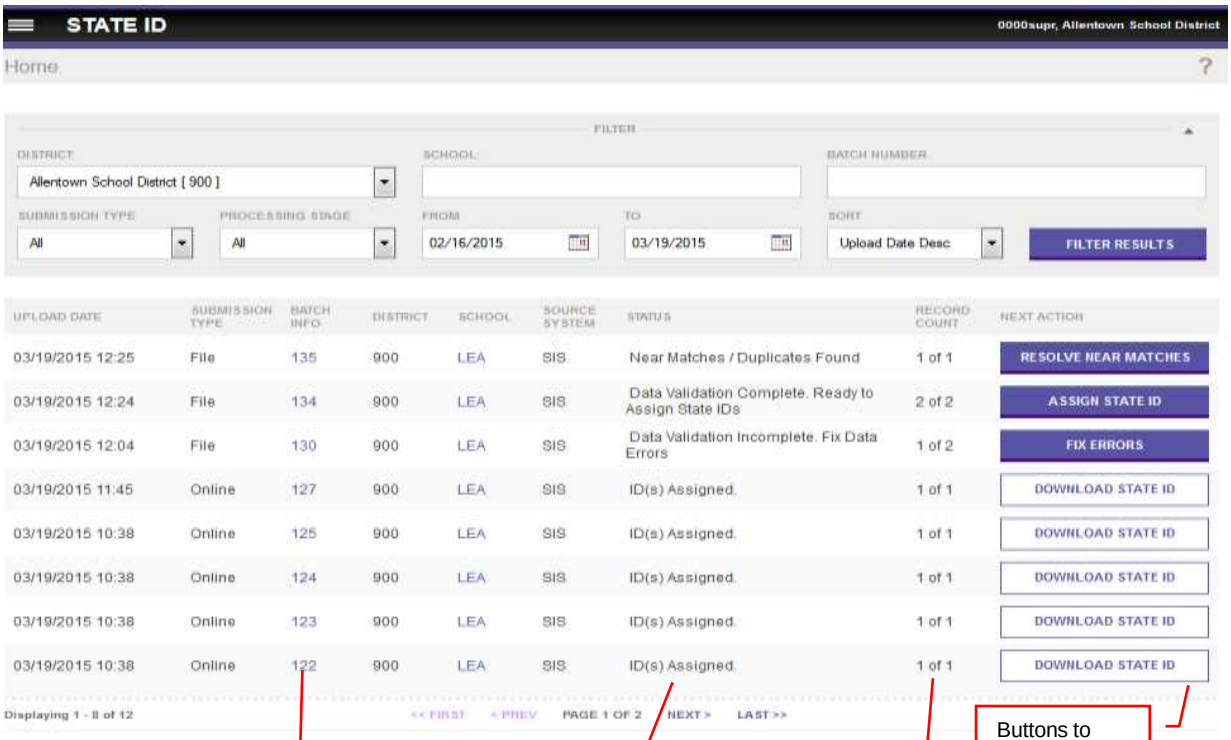
Viewing Previously Submitted Batches

The bottom section of the Home Page provides users with a list of submissions to the eUID application that have been uploaded via a batch file, entered online, submitted using SIF or Web Services, edited online, or AFP. This list displays the upload date, batch ID, current status, number of records in the batch, and the next action and only displays batches the user has access to for their current location. The button in the *Next Action* column allows the user to continue where they left off in the ID assignment process. Each action correlates to a step in the ID Assignment process.



NOTE: *The status column always displays the current status of the batch being processed and guides the user to the next action to be performed. The* ***NEXT ACTION*** *column has a button that enables the user to initiate the next action. For AFP batches there will be no Fix Errors Next Action button. These batches will include Resolve Near Matches and Download IDs.*

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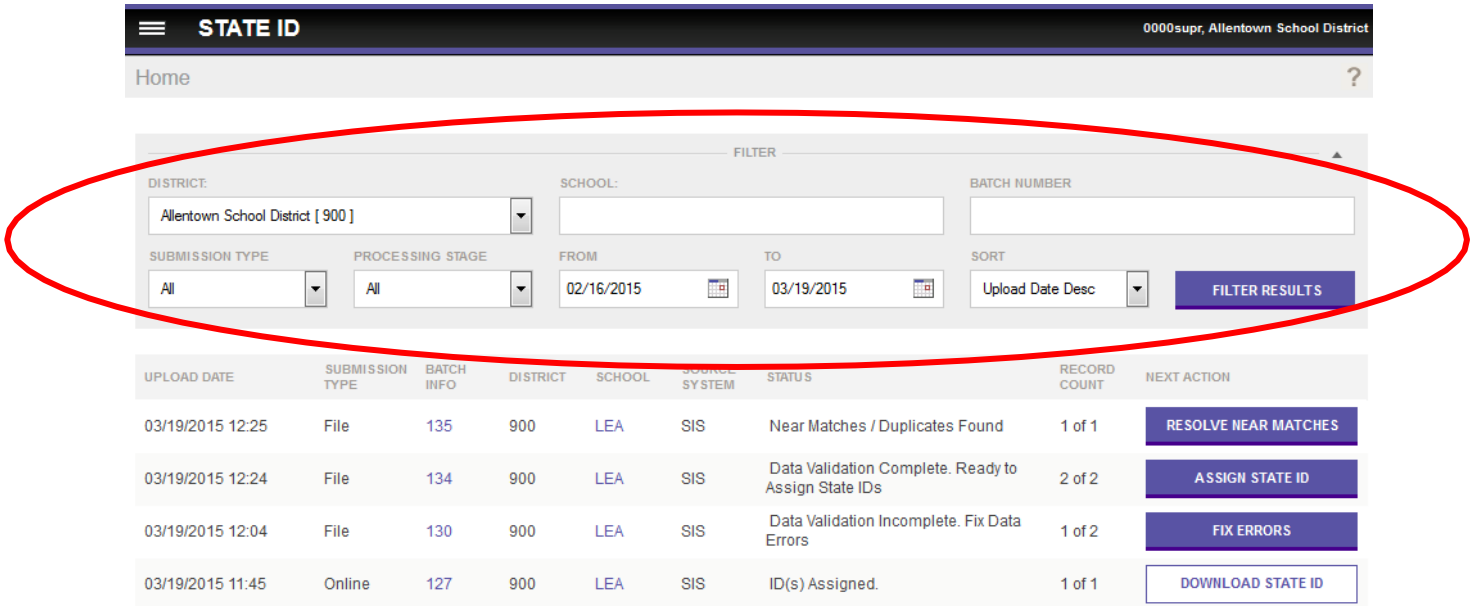
Filtering Batches

Users have the ability to narrow down the batch list by utilizing the batch filters. The Home page includes the following filters:



- *District:* The application will display all of the Districts that a user has access to so that the page can be filtered by a specific district.
- *School:* A school code for the selected district can be entered to filter by district and school.
- *Batch Number:* Entering a Batch ID in the filter allows users to view and work on a specific batch, independent of the other filter options. This Batch ID is unique to the batch and can be used for finding a batch.
- *Submission Type*: The options are All, File, Online, SLF, Edit, WebService, and Automation.
- *Processing Stage:* The options are All, Validate Data, Fix Errors, Assign State ID, Resolve Near Matches, Download State ID, Canceled, Validation in Progress, Assignment in Progress, Continue Validation, or Continue Assignment.
- *Submission Date:* Expects valid date ranges.
- *Sort:* Users can sort by Upload Date, Batch Number, or Batch Status.

NOTE: *Searching for a specific Batch using the Batch Number filter will ignore all other filter options.*

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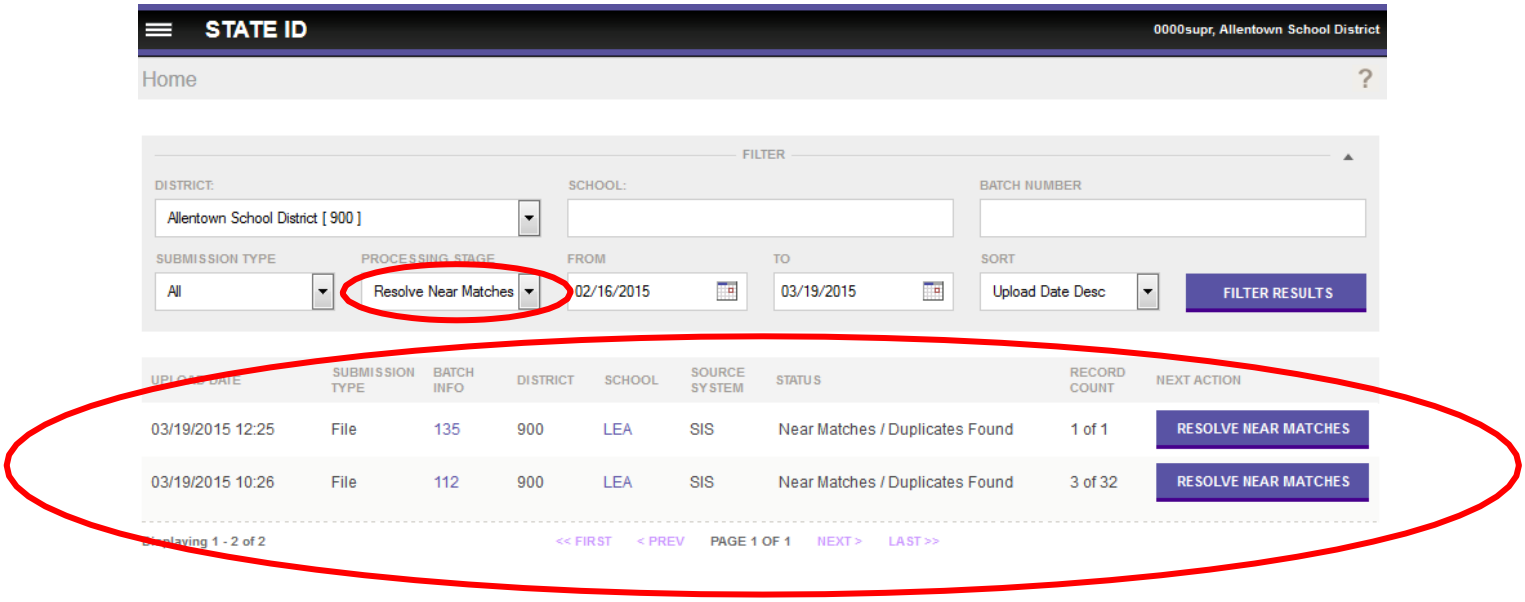
To apply filters to the batch list, users should perform the following steps:

1. Click the dropdown arrow and select the appropriate option for each of the filters.
2. Click the FILTER RESULTS button.
3. The page will refresh and limit the results based on the filters.

Results from Filtering

- **Found Batch:** If the application finds a matching batch, the application will display the page listing only that batch in the Batch List.



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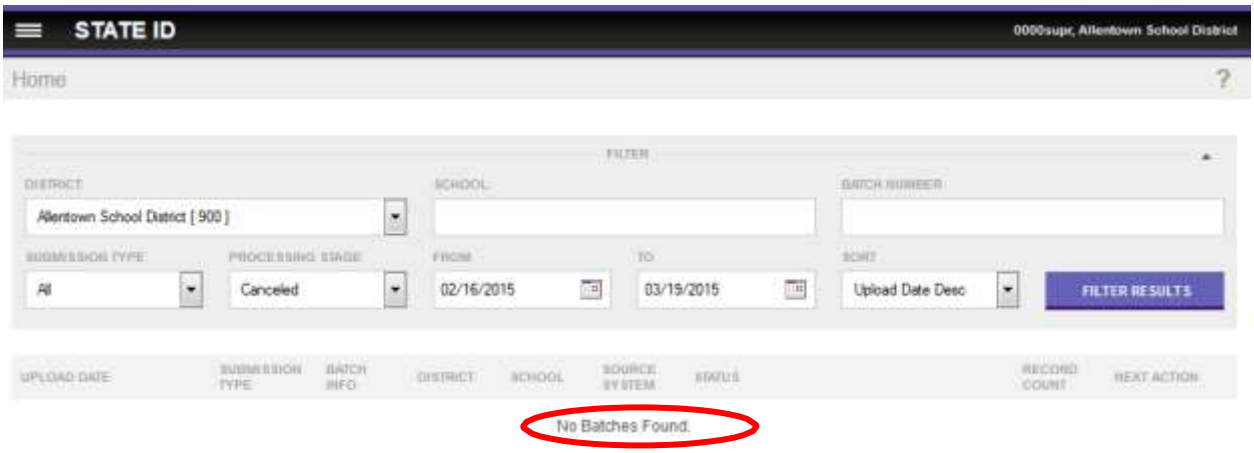
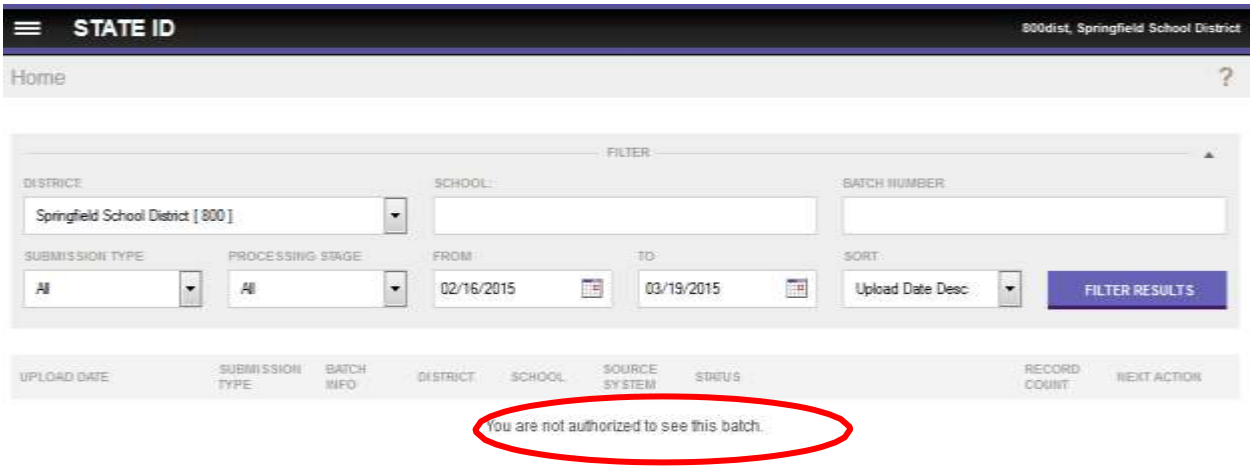
- **No Batch Found:** If the application cannot find the batch the user specifies, the application will display a message stating that no batches were found.



- **User Not Authorized:** If the user enters a Batch ID and the application finds the batch the user specifies but the user does not have the appropriate rights to view the batch, the application will display a message stating the user is not authorized to view the batch.



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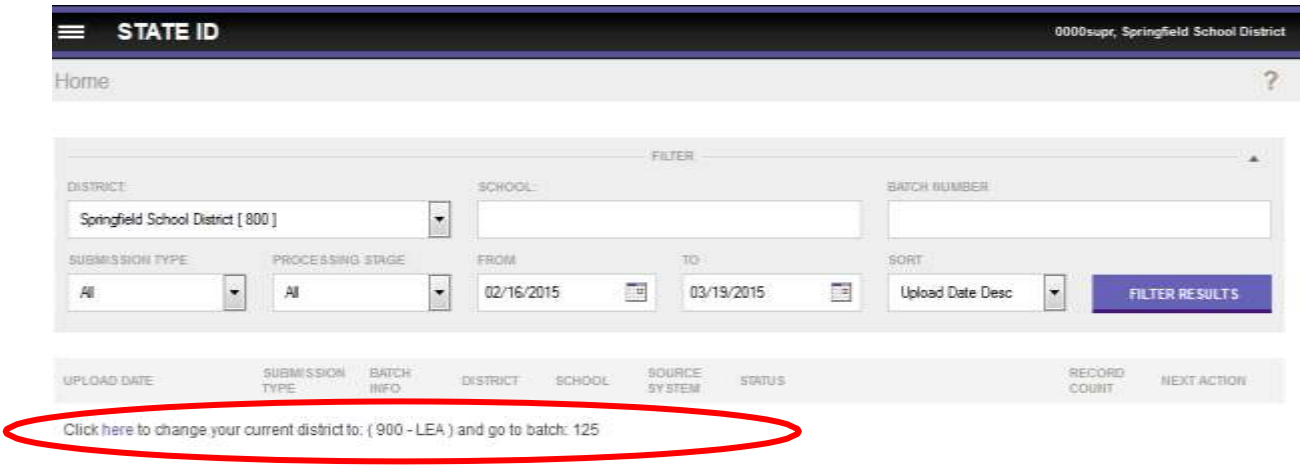
- **Multiple Districts:** For those users who have access to more than one district, entering the Batch Number to find a specific batch has an additional feature. If the batch number submitted is for a district other than the user's current district and the user has access to that other district, the application will display a message stating that the user should change their current district setting.



In the above example, the batch the user is searching for is in another district. Users can switch to that other district automatically by clicking on the here link. Upon doing so, the application will change the user's district and also display the batch list for that district.

Next Actions Buttons

These buttons walk a user through the steps of the ID Assignment process. They will each display the next step to be completed for the particular batch and will navigate the user to the page that needs to be completed. Please see the ID Assignment Process on page 3 for an overview of each step in the ID Assignment process.

NOTE: *The system has fault tolerance features that will run upon startup of an application server. For example, if at the time an application server is brought down, one or more submissions are in the middle of data validation or ID assignment processing, all those submissions will restart where they left off in their processing when the server is restarted.*

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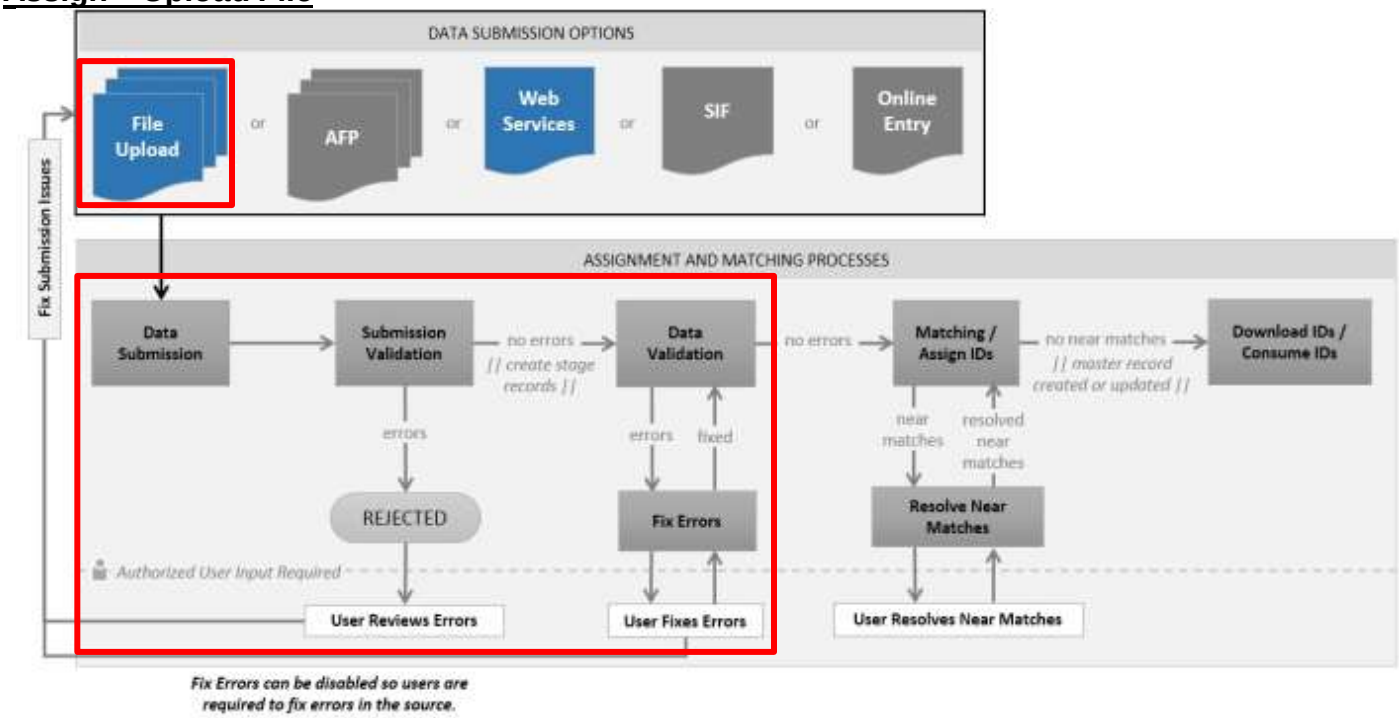
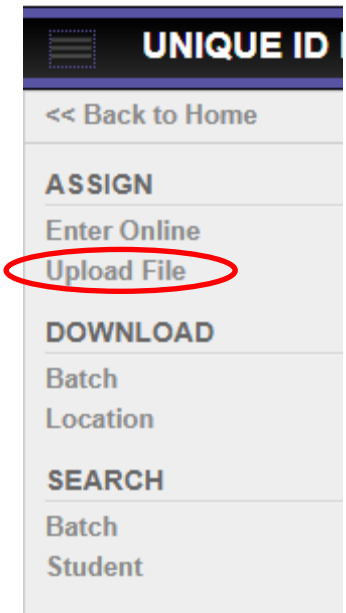
STEP 1: UPLOAD FILE / ENTER ONLINE, VALIDATE SUBMISSION, & FIX DATA ERRORS

Assign > Upload File



Fix Errors can be disabled so users are required to fix errors in the source.

About Assign By Upload File



Users can process a batch file for ID Assignment by clicking the **Upload File** link under **ASSIGN** from the Main Menu. Prior to v9.0, this feature was called "Upload Batch File".

This feature allows users to:

- Upload a student batch file.
- Validate data.
- Fix validation errors.
- Assign IDs.
- Resolve Near Matches.
- Download IDs.

Some implementations may disable this feature for certain or all users. In such an instance, the link will not appear on the Main Menu.

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Steps

The Upload File component allows users to select a Basic or Advanced file upload.

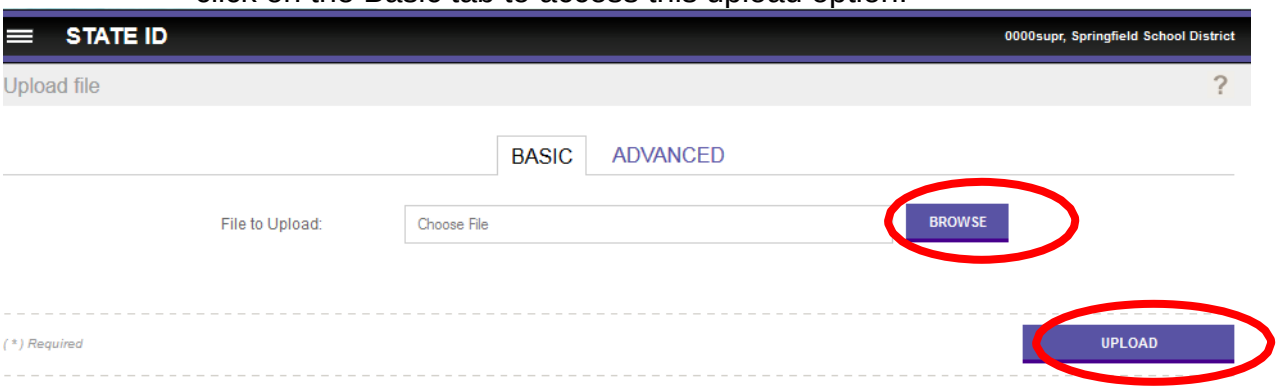
The Basic upload option requires that the input file includes a header record, student details, and a trailer record. The input file header record defines the extraction date, import type and other file information. More details on the specific file requirements can be found in the File Format document.

The Advanced option allows users to define the input file information in the eUID application rather than in the file itself. With the Advanced option upload, users can select the template, file to upload, field delimiter, field qualifier, and whether or not to ignore the first row.

Basic Upload:

To upload a file, users should follow these steps:

1. Access the "Basic" tab.
   - The application should default to the Basic tab, if the tab is not selected, click on the Basic tab to access this upload option.



2. Click the BROWSE button to view the local computer system directory structure. The file must be located on the local computer system in order to upload the file.
3. Browse through the directory structure and choose the directory/folder where the batch file is stored.
4. Select the appropriate file from the local system and click the Open button.
5. Click the UPLOAD button. This uploads the file listed in the "File to Upload" field to the eUID application server for subsequent processing.

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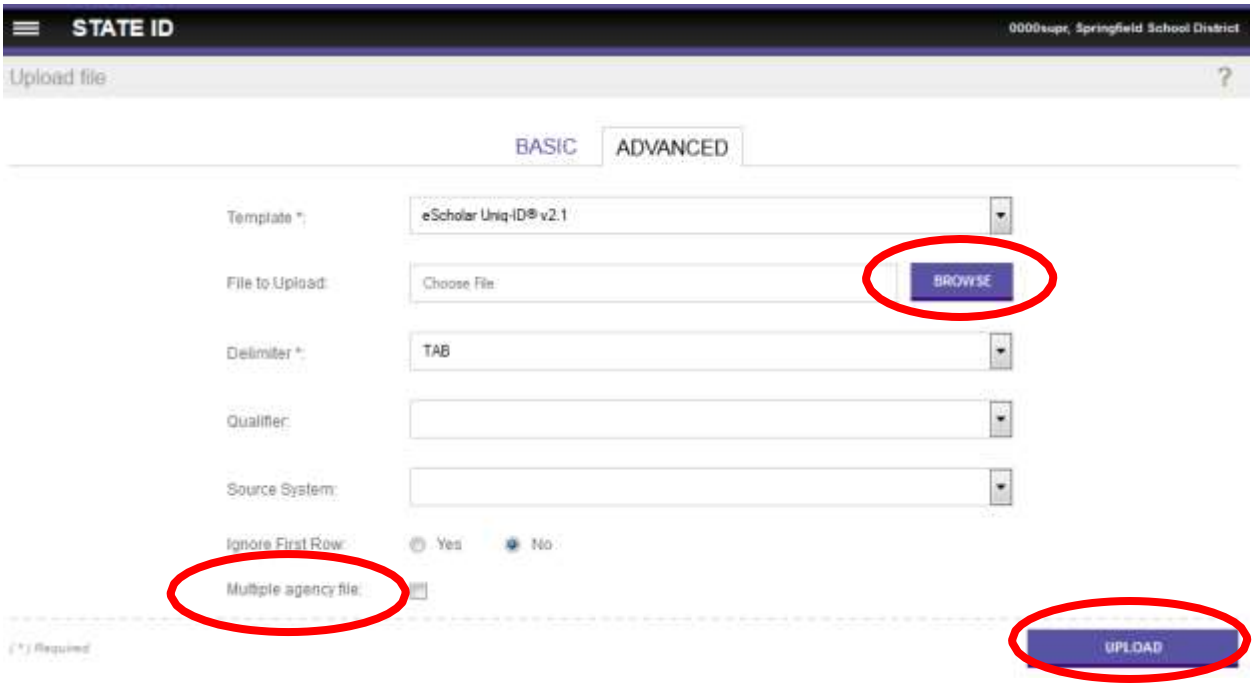
Advanced Upload



1. The Upload File component will default to the “Basic” tab. Select the “Advanced” tab.
2. Select the appropriate Template. Currently the templates available are eScholar Uniq-ID® v1.0, eScholar Uniq-ID® v2.1, and eScholar Uniq-ID® v3.0.
3. Click BROWSE to view the local computer system directory structure. The file must be located on the local computer or network drive in order to upload it.
4. Browse through the directory structure and choose the directory/folder where the batch file is stored. Select the appropriate file from the local system and click the Open button.
5. Select the appropriate “Delimiter” for the file. The options available are:
   - Comma
   - Tab
6. Select the appropriate “Qualifier” for the file. The options available are “ or ‘.
7. For eScholar Uniq-ID® File Format Version 2.1 and eScholar Uniq-ID® v3.0, users <u>must</u> select a Source System. If eScholar Uniq-ID® v1.0 is used, no Source System should be selected.
8. Select the appropriate “Ignore First Row” option for the file. The options are

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"Yes" or "No". When "Yes" is selected, the first row in the input file will be ignored during the upload processing. When "No" is selected, the first row will be included in the upload processing. When "Yes" is selected, the row is still counted in the record count provided in Batch Info, but the record is not processed.

9. If the file contains multiple agencies (Multiple Agency file), the Multiple Agency File option must be selected.

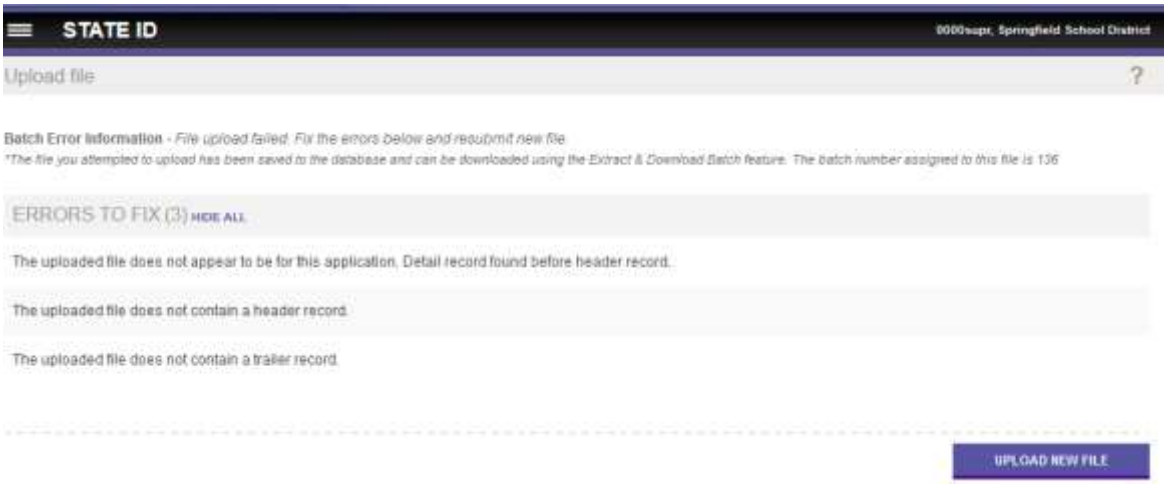
> ***TIP:*** Prior to eUID 8.0 the application only accepted single district files. In eUID 8.0 and above a user with authorization to multiple agencies (districts) can now upload one file which includes data for all of those agencies. The near matches created by these batches can only be resolved by the user or state administrators because the batch is created at the state-level.

10. Click the UPLOAD button. This uploads the file to the eUID application server for subsequent processing.

Once the file is uploaded using either the Basic or Advanced upload, the file passes through file validation. The application performs a review of the file for issues in format and layout and can produce a *File Upload Failure* or *File Upload Successful* status.

File Upload Failure

If the application encounters any file errors while attempting to upload the student Batch File, it will provide the user details about the error(s). The application will display the reasons why the file failed to upload.



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NOTE: *The application will store all rejected student Batch Files in the database when there is a fatal file error. Users can download these files with the Download By Batch module. The above page will provide a batch number that can be used to find the file in* ***Download Batch****. The user can upload a new file by clicking on the* UPLOAD NEW FILE *button.*

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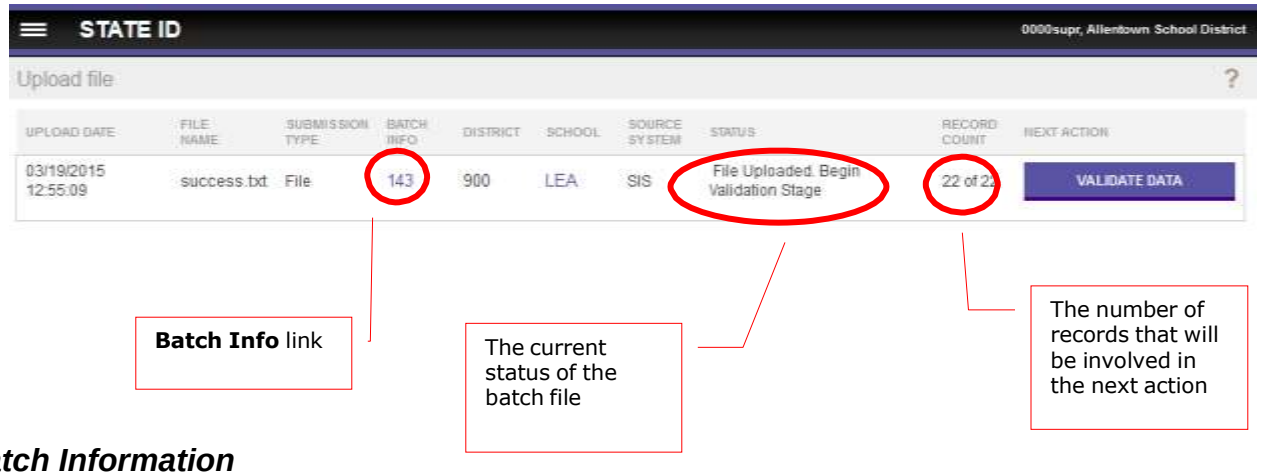
File Upload Success

If a batch does not encounter any file issues, the application will allow the user to view details about the batch and to proceed to the Validation step. The following page displays if the batch file upload is successful:



Batch Information

Once a batch has been submitted, users can click the link in the *Batch Info* column to display the status of the batch file. This link will display the batch number for that batch. This information can be displayed at any point during the batch process. A pop-up window as seen in Appendix A on page 129 will be displayed when the button is clicked.

> ***NOTE:*** *With some implementations, the label on the* ***BATCH INFO*** *link displays the text "BATCH INFO" instead of the actual Batch Number. However, the information in the pop-up remains the same.*
>
> ***NOTE:*** *For a full explanation of the different sections/tabs of the* ***Batch Info*** *window, please see* ***Appendix A*** *on page 129.*

Validate Data

Once a file has passed file validation, the next step is data validation. This process loads the records in the file into the staging database tables, where further validation checks are performed on the data. This includes validation of valid values such as dates and codes, user authorization for submitted records, and possible claims. This step will produce validation errors (validation failure) or will allow the user to proceed to the next step of assigning IDs if there are no validation errors.

To validate data, users should perform the following steps:

1. Upload a batch as described above.

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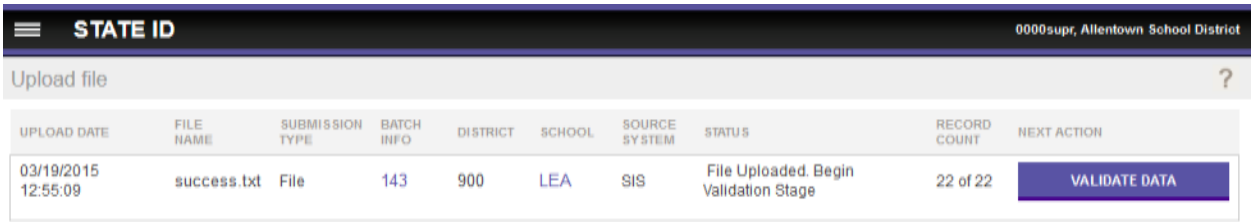
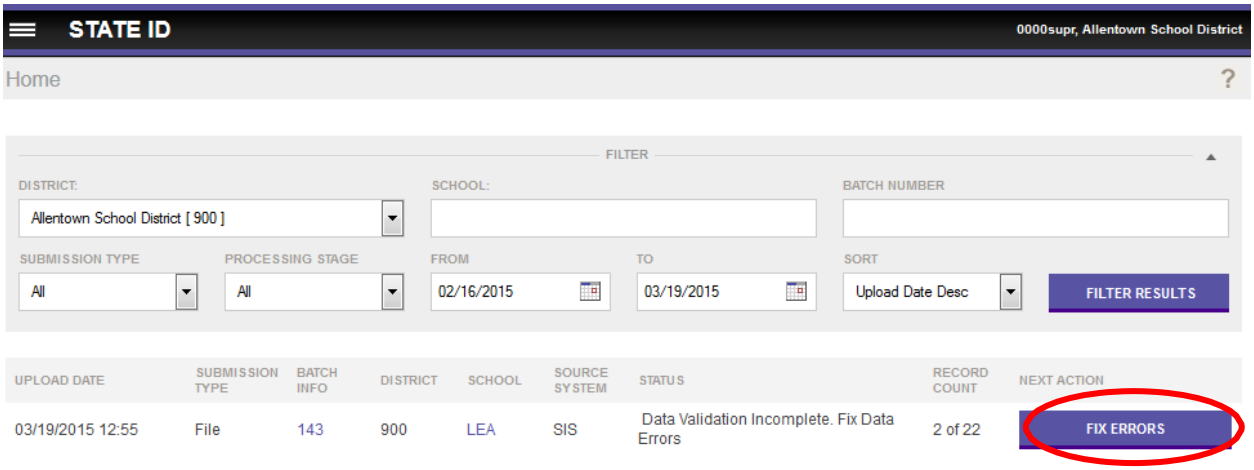


2. Click the VALIDATE DATA button.
3. A validate data page will be displayed. View the batch info and validation details as needed.

4. Click the BACK TO HOME button to return to the main page to check for the updated status of the process.



NOTE: *If no errors are found during the validation process, the application navigates to the ID assignment page. If errors are found, the* FIX ERRORS *button will be displayed.*

TIP: *If the batch upload proceeds through the "Validate Data" step without interaction from the user, the system administration may have set the "Auto Start Validation" system property to Yes. When the property is set to Yes, users will not see the "Validate Data" button.*

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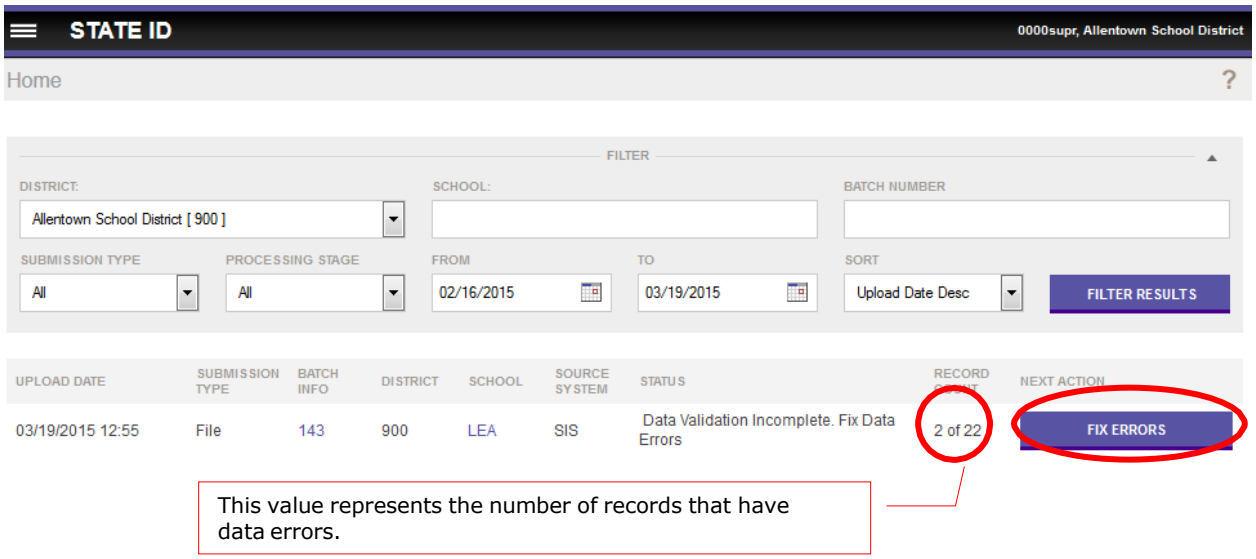
NOTE: *If the application is interrupted (e.g., connectivity to the database is lost) during data validation, the batch returns a message stating the same. Click* ***CONTINUE VALIDATION*** *in the* ***Next Action*** *column to restart the process. This may be the case even if all the records, according to their status, appear to have finished validation. In this instance, the user should still click* ***CONTINUE VALIDATION.***

View Batch Information

To view specifics about the batch after validation, users can click the link in the *Batch Info* column. This Batch Information pop-up window will display a Batch Statistics tab. This tab will display information on the status of the batch and the number of records the status applies to. For more details on batch information, refer to Appendix A on page 136.

Fix Validation Errors

If the batch file contained one or more records that failed validation, the Home Page display a FIX ERRORS button in the Next Action column:



All records with a data error must be *fixed or canceled* before submitting the batch for ID assignment.

Fix Errors

To fix/address the data errors, users should perform the following steps:

1. Click the FIX ERRORS button mentioned above.

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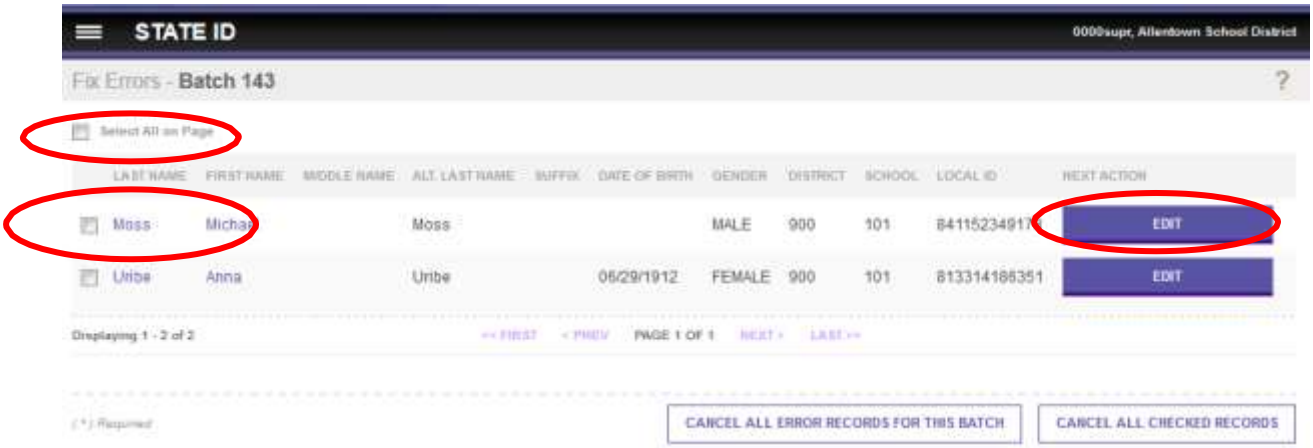
2. The application will display the Fix Errors page.

3. Click the EDIT button or click the hyperlinked **Last Name** or **First Name** columns on the Fix Errors list page to continue the fix process.



NOTE: *All records that fail validation must be reviewed and fixed for the batch to be considered for ID assignment.*

The **Fix Errors** details page will display the student information, along with an error message directly below the error fields. In addition, a list of all the original data errors (when the record first went through data validation) will display at the bottom of the page. The information displayed on the Fix Errors page is dependent upon the Default Upload Template configuration. For example, when eScholar Uniq-ID® v2.1 is the Default Upload Template, the fields associated with this template will be displayed. If eScholar Uniq-ID® v1.0 is the Default Upload Template, the eScholar Uniq-ID® v2.1 fields will not be displayed. Same logic applies when eScholar Uniq-ID® v3.0 is the Default Upload Template.

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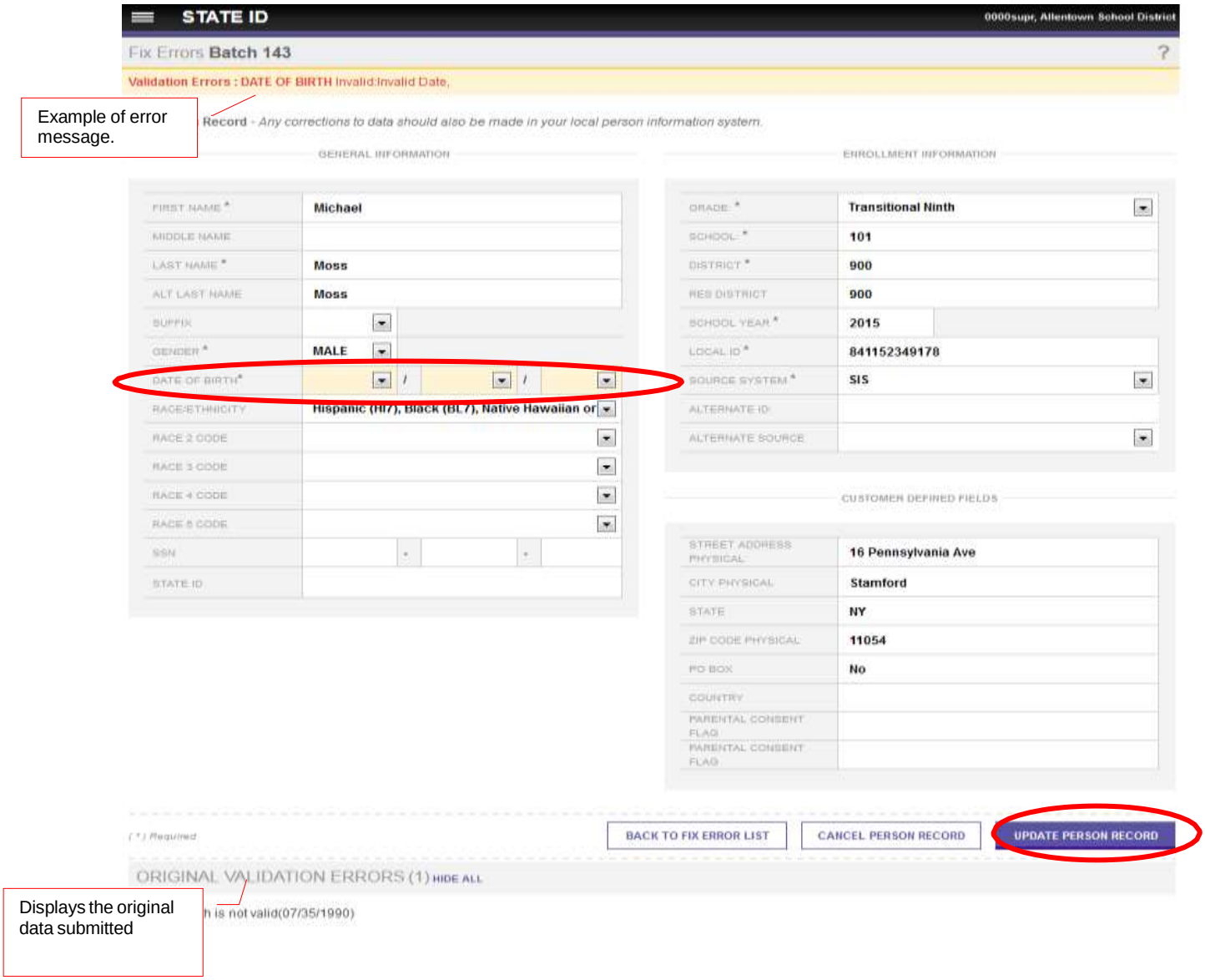

4. Correct all of the error fields by entering valid values.

5. Click the **UPDATE PERSON RECORD** button.

NOTE: *With some implementations, the* ***Update student Record****, or* ***Cancel student Record*** *buttons may be disabled.*

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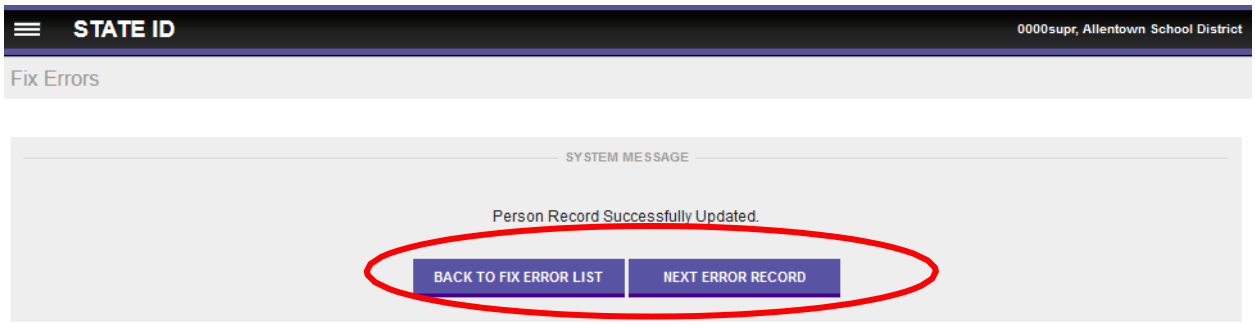
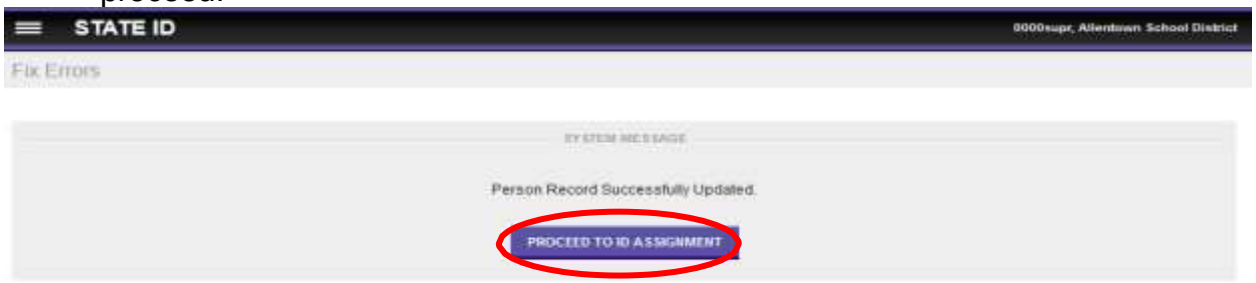
6. The application will display a confirmation page indicating that the error was successfully fixed or will return to the Fix Errors form until all issues are resolved.



7. From the above page, users can return to the list of records with data errors by clicking BACK TO FIX ERROR LIST or can navigate to the next data error record by clicking the NEXT ERROR RECORD button.
8. Repeat as necessary to resolve each record.
9. Once all the records have been reviewed and fixed, the button on the confirmation page will change to PROCEED TO ID ASSIGNMENT. Click this button to proceed.



Cancel Records

Records can be canceled on the Fix Errors details page or the Fix Errors list page. When a record is canceled, the record is removed from the batch and cannot be assigned an identifier within that batch. The corrected records need to be re-submitted in a new batch file in order to be processed.

Records from the *Fix Errors list* can be canceled, either by specific records or by all errors in the batch. To cancel a specific record on the Fix Errors list page, users can check the box to the left of the record and then click the CANCEL ALL CHECKED RECORDS button on the Fix Errors list page as shown below. Multiple records can also be canceled by selecting more than one record on this

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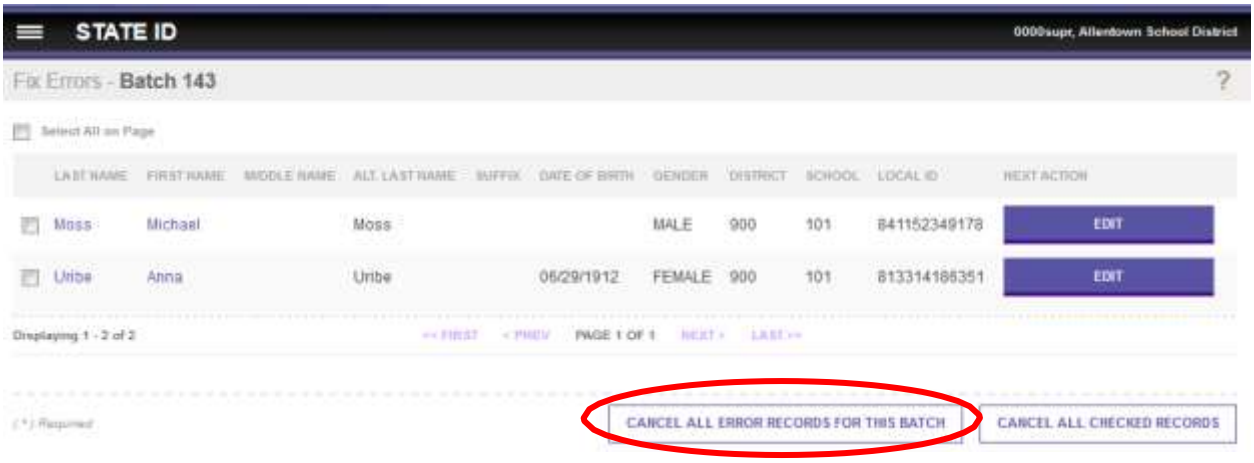
page. Users can also select all *records on this page* by checking the **SELECT ALL IN PAGE** checkbox and then clicking the CANCEL ALL CHECKED RECORDS button.

To cancel all error records in the entire batch, users should click the CANCEL ALL ERROR RECORDS FOR THIS BATCH button.



NOTE: *The list of records with data errors may span two or more pages. The* CANCEL ALL ERROR RECORDS FOR THIS BATCH *button can be used to cancel all of the error records, even those listed on other pages.*

To cancel records from *Fix Errors details* page, users should click the CANCEL PERSON RECORD button.

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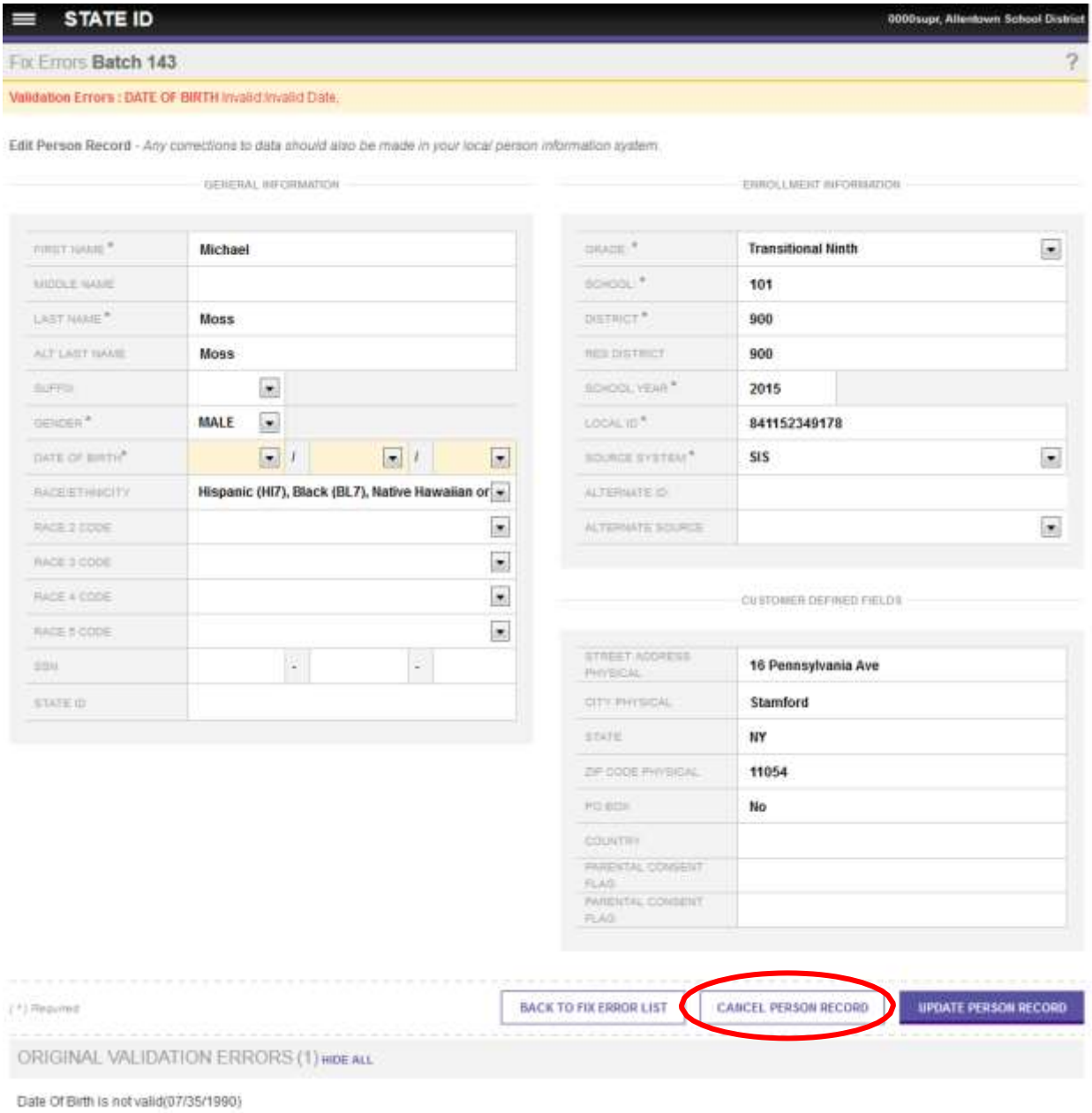

NOTE: *Canceling a record effectively removes it from the batch and it will not be used in the remaining steps of the ID Assignment Process.*

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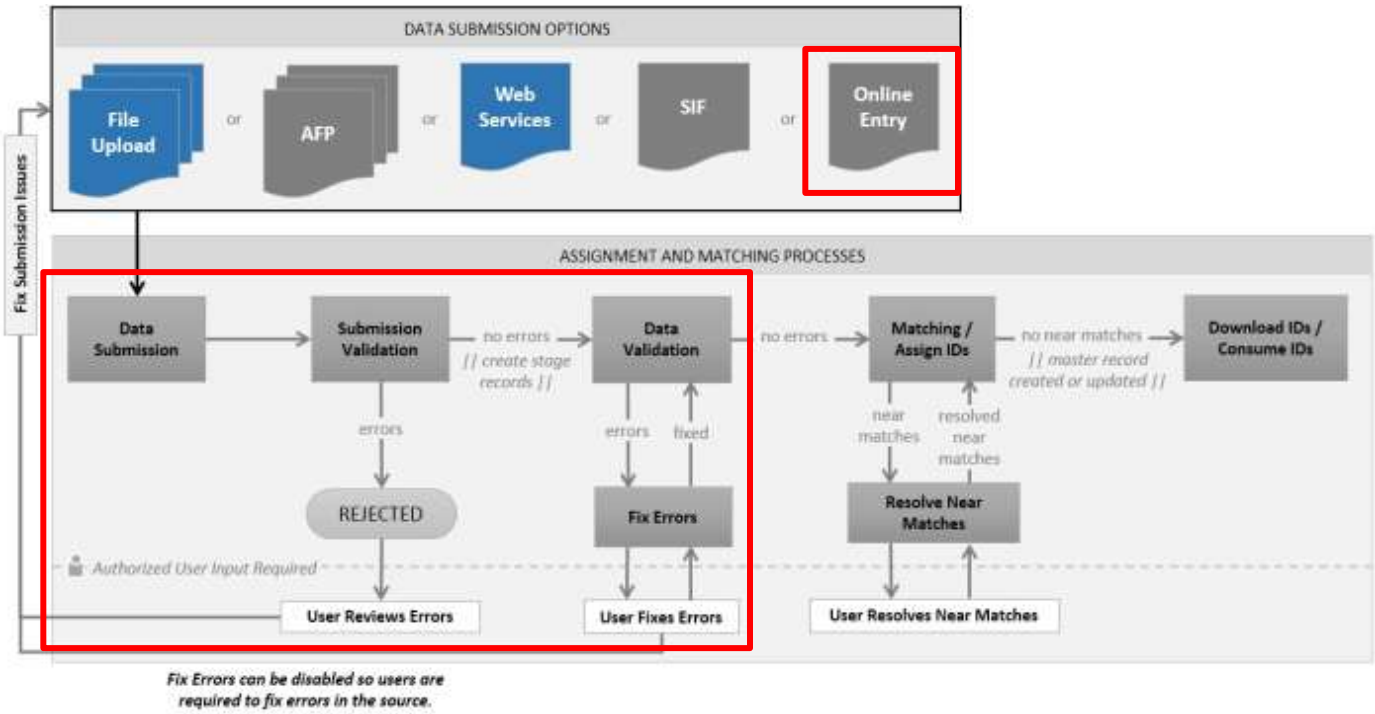
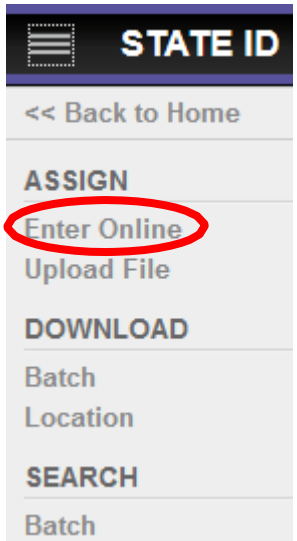
Assign > Enter Online



Fix Errors can be disabled so users are required to fix errors in the source.

<u>About Assign > Enter Online</u>



Users can also submit a single student record for ID Assignment by clicking the **Enter Online** link under **ASSIGN** from the Main Menu. Prior to v9.0, this feature was called "Enter Individual student".

This feature allows users to:

- Manually enter one student at a time.
- Validate and fix data.
- Assign IDs.
- Resolve Near Matches.
- Download IDs.

Some implementations may disable this feature for certain or all users. In such an instance, the link will not appear on the Menu.

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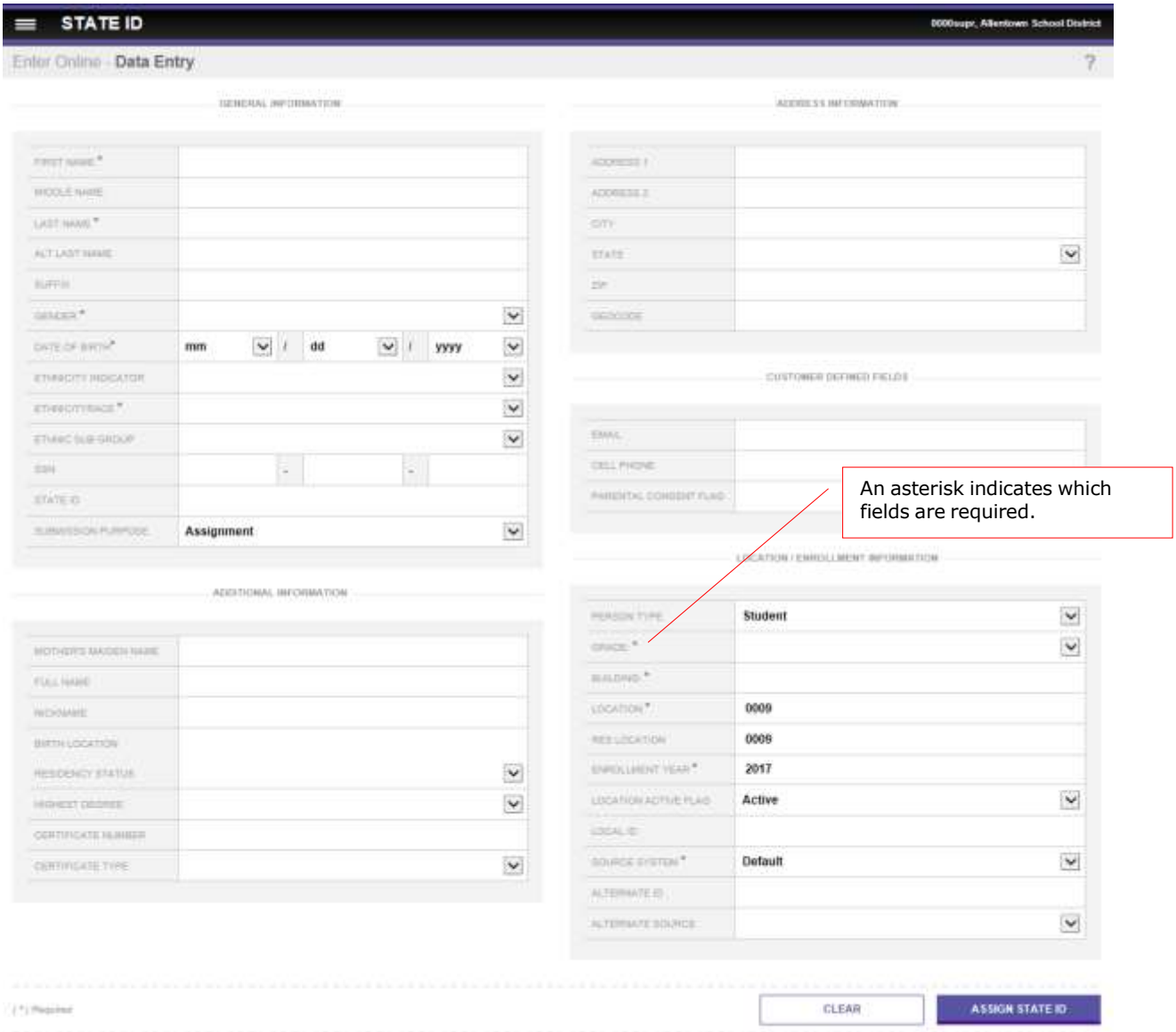
Steps

Enter Data

To enter student records online, users should perform the following steps:

1. Click the **Enter Online** link on the *Main Menu*.
2. Complete the “Enter Online” form.



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NOTE: *The sections, fields, field labels, field requirements displayed to the user are dependent on the Default File Layout and Enabled/Required Fields set by the System Administrator.*

As of eUID 10.0, the Enter Online page includes sections of data including:

- **General Information** – includes the basic student information such as name, date of birth, gender, ethnicity and other demographic fields.
- **Address Information** – includes address fields such as address 1, city, state, and zip code.
- **Customer Defined Fields** – includes all of the Customer Defined Fields enabled within the application.
- **Additional Information** – includes fields such as nickname, birth location, residency status, and highest degree.
- **Location/Enrollment Information** – includes fields such as student type, grade, building, location, local id, alternate id and other enrollment fields.

3. Once the form has been completed, including all required fields, click ASSIGN STATE ID button.

NOTE: *Due to the importance of SSN in matching, users should only provide valid SSNs for student records. If the SSN is unknown, the SSN should remain null. SSNs that are invalid according to SSA rules will not be sent to the matching engine or result in a validation error.*

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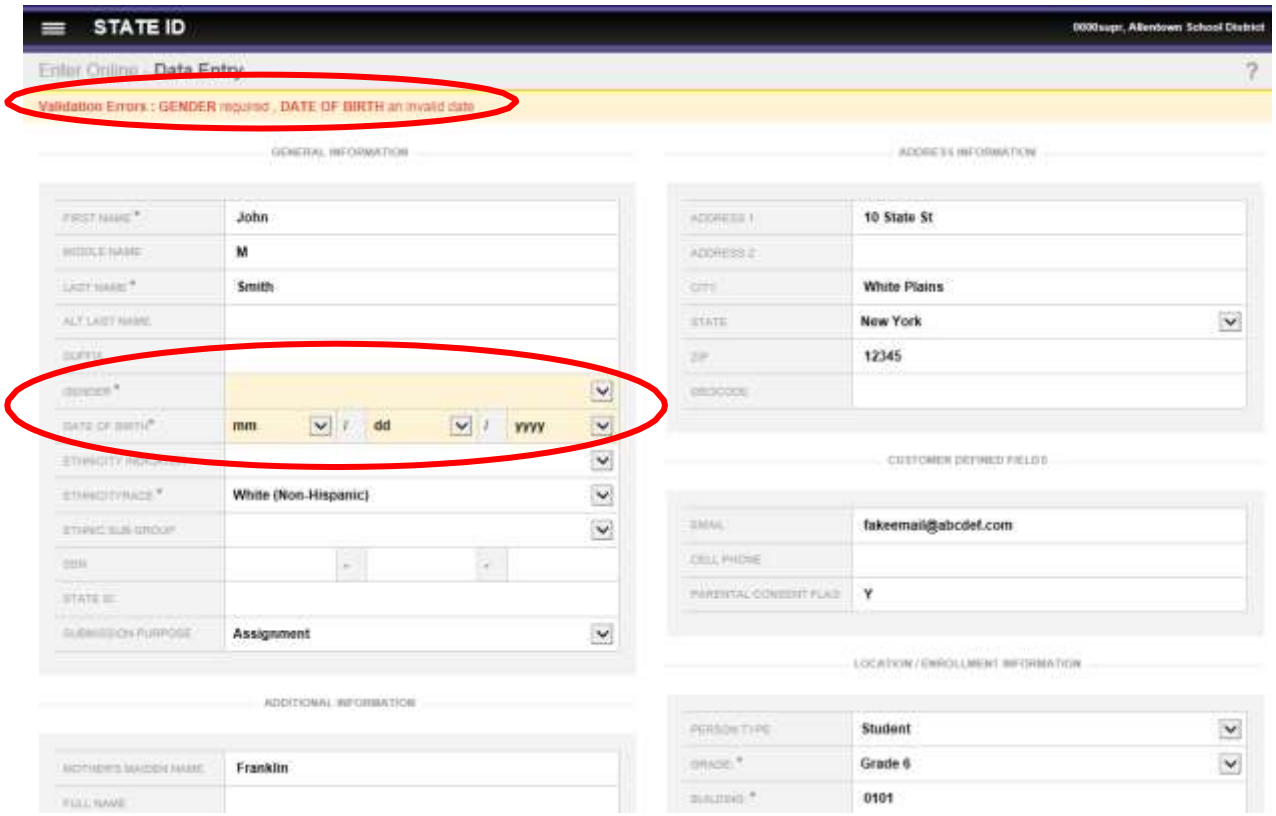
Validate and Fix Errors

The application will validate all the data entered by the user. If one or more data errors are found, the application will return an error message as shown below.



User should correct the information on the form and then click the ASSIGN STATE ID button which will take the user to the next step in the ID Assignment Process: Assigning IDs on page 17. The application will not go to the next step of assigning IDs until all fields successfully pass validation.

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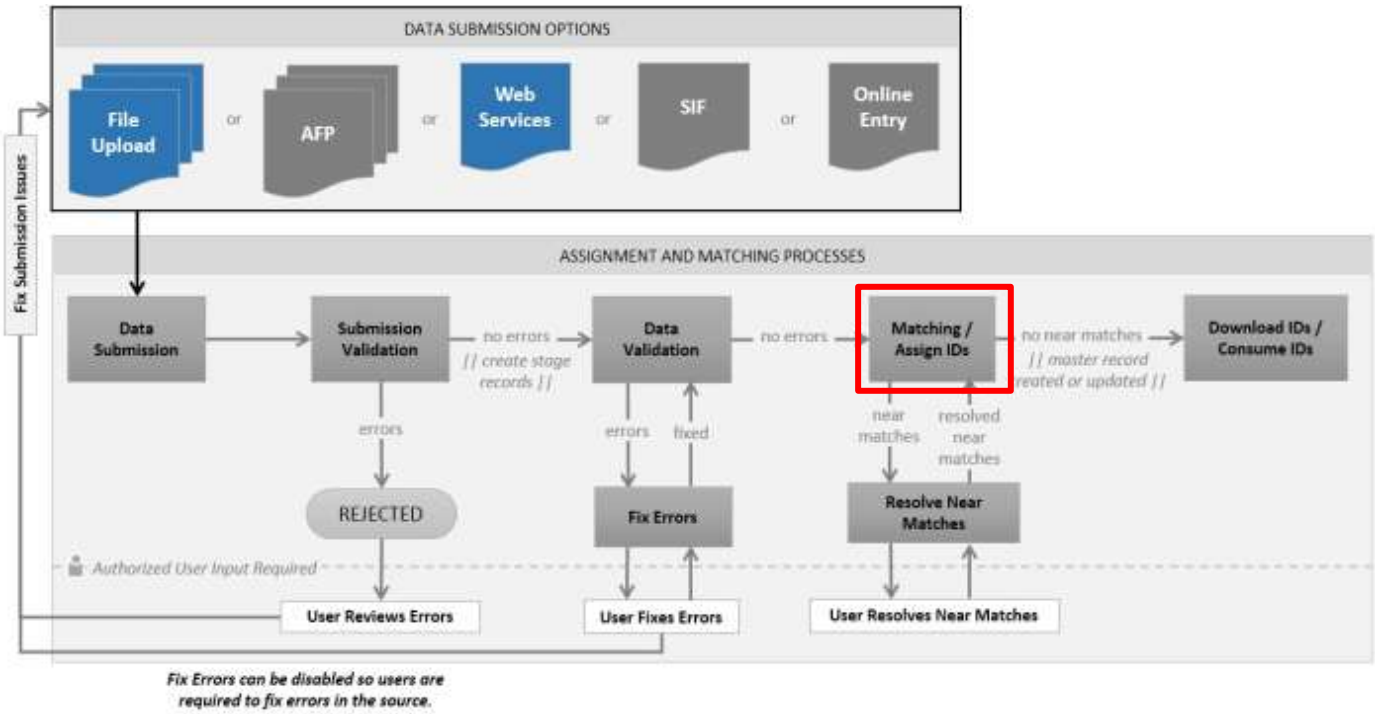
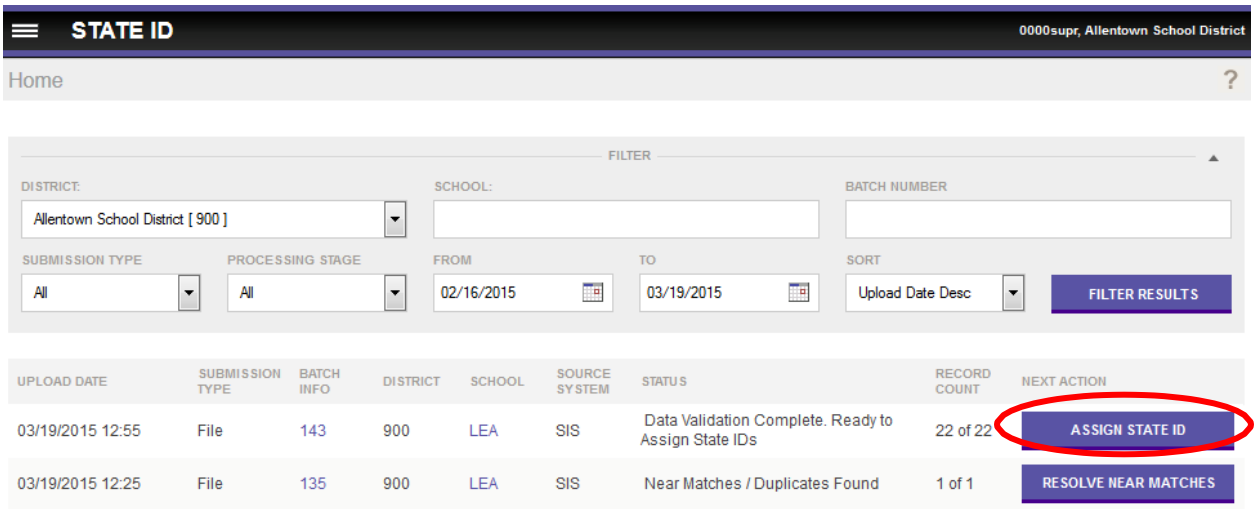
STEP 2: ASSIGN IDS



About Assign IDs

After all validation errors are addressed, either by fixing or canceling the student record(s), the ASSIGN STATE ID button will be displayed. ID assignment can now be started.



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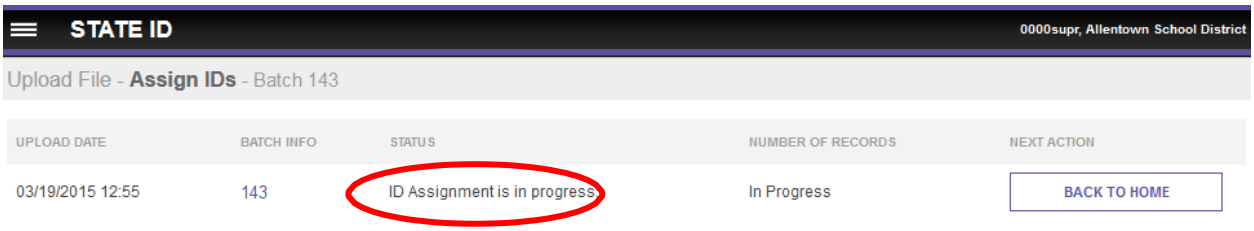
Steps

To assign IDs, users should perform the following steps:

1. Click the ASSIGN STATE ID button in the Next Action column. When this process is initiated, the eUID application displays an intermediate page as follows:



2. To review the updated status of the assignment process, return to the application Home Page by clicking the BACK TO HOME button.
3. Review the "Status" column for the updated status or click the "Batch Info" button to review batch information. See Batch Information section in Appendix A on page 136 for more details about the "Batch Info" button.
4. Review the "Next Action" column for the appropriate next step(s).

   The ID assignment process can produce three different results: Match, Near Match or No Match.

   a. If the application encounters a single **Match**, it will assign the ID of the matching student to the record being submitted. The information contained in the submitted record becomes the ID's current information and the information of the matching student becomes part of that ID's history. These records do not need to be reviewed.

> ***NOTE:*** *The application includes an Authoritative Source feature that impacts whether or not the master record is updated when a Match is found. If the submitting source has authority to update master records, the master record will be updated and the original master record will be moved to history. If the submitting source does not have authority to update master records, the master record will not be updated.*

   b. If the application encounters a **Near Match**, multiple **Matches**, or any combination of both, it will mark the record as **Ready to Resolve Near Matches/Duplicates** and an ID is not assigned. These records need to be reviewed and resolved by a human.

   c. If the application finds no matching student, it will assign a new ID. These records do not need to be reviewed.

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> ***NOTE:*** *For some implementations, outcome "c" above will have to be reviewed and resolved by a human. In those instances, the application will not assign the ID of the matching student but rather mark the record* as ***Ready to Resolve Near Matches/Duplicates****.*

5. Complete the "Next Action" step by clicking the appropriate button.
   a. If one or more Near Matches are encountered, the "Status" for the batch will be "Near Matches / Duplicates Found" and the "Next Action" column will display a RESOLVE NEAR MATCHES button:

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
03/19/2015 12:55	File	143	900	LEA	SIS	Near Matches / Duplicates Found	19 of 22	RESOLVE NEAR MATCHES
03/19/2015 12:25	File	135	900	LEA	SIS	Near Matches / Duplicates Found	1 of 1	RESOLVE NEAR MATCHES
03/19/2015 12:24	File	134	900	LEA	SIS	Data Validation Complete. Ready to Assign State IDs	2 of 2	ASSIGN STATE ID
03/19/2015 12:04	File	130	900	LEA	SIS	Data Validation Incomplete. Fix Data Errors	1 of 2	FIX ERRORS
03/19/2015 11:45	Online	127	900	LEA	SIS	ID(s) Assigned	1 of 1	DOWNLOAD STATE ID

   b. If the application does not find any near matches, the Status for the batch will be ID(s) Assigned and the "Next Action" column will display the DOWNLOAD STATE ID button.

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
03/19/2015 12:55	File	143	900	LEA	SIS	Near Matches / Duplicates Found	19 of 22	RESOLVE NEAR MATCHES
03/19/2015 12:25	File	135	900	LEA	SIS	Near Matches / Duplicates Found	1 of 1	RESOLVE NEAR MATCHES
03/19/2015 12:24	File	134	900	LEA	SIS	Data Validation Complete. Ready to Assign State IDs	2 of 2	ASSIGN STATE ID
03/19/2015 12:04	File	130	900	LEA	SIS	Data Validation Incomplete. Fix Data Errors	1 of 2	FIX ERRORS
03/19/2015 11:45	Online	127	900	LEA	SIS	ID(s) Assigned	1 of 1	DOWNLOAD STATE ID

> ***NOTE:*** *With some installations, the application could also create a claim for one or more records within a batch. This is called Auto Claiming. When this feature is enabled, the application automatically generates a claim for the student record. Once the claim is created, the record is removed from the batch.*

> ***NOTE:*** *If the application is interrupted (e.g., connectivity to the database is lost) while it is performing ID assignment, the batch will be returned with a message stating the same. The process can be restarted by clicking* ***CONTINUE ASSIGNMENT*** *in the* ***Next Action*** *column. This may be the case even if all the records, according to their status, appear to have finished ID assignment. In such an instance, you should still click* ***CONTINUE ASSIGNMENT****.*

Batch Information

Reminder: Users can click the *Batch Info* link to display the status of the batch file and its records as seen in Appendix A.

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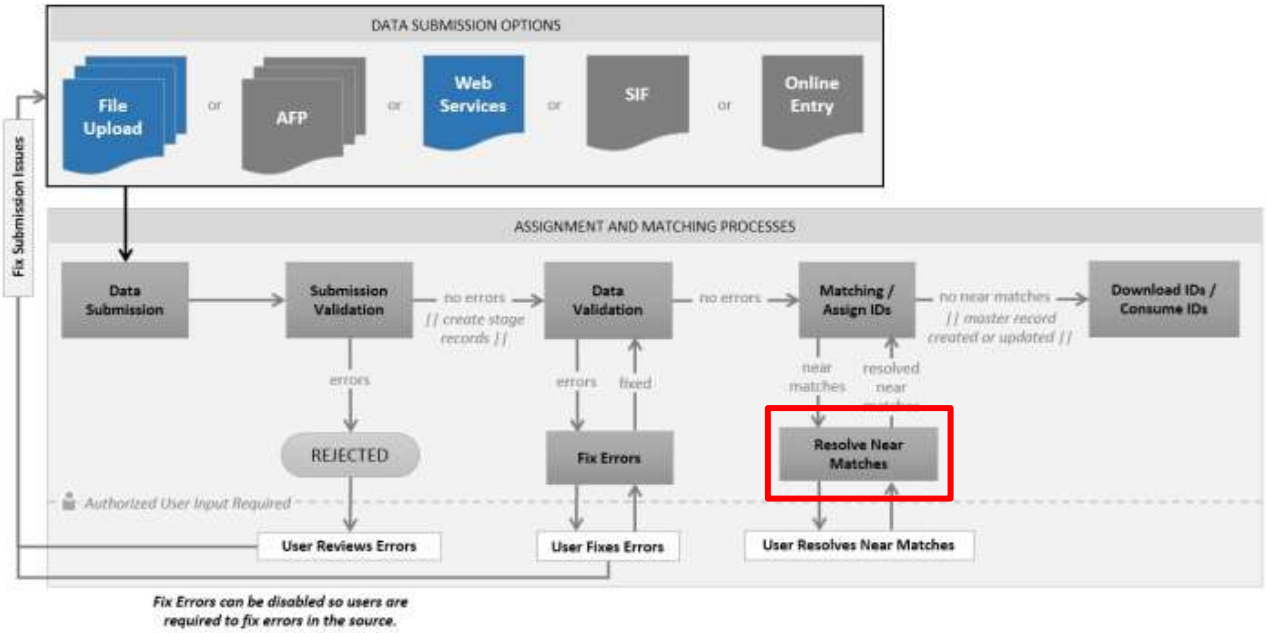
STEP 3: RESOLVING NEAR MATCHES



About Resolving Near Matches

All Near Match records must be resolved before the user can continue to the next step in the ID Assignment process. Near Match records can be resolved by assigning an ID, creating a new ID, or by canceling the record(s). One batch may have one or many submission records in a near match status and one submission record may have one or many pending near matches.

When resolving pending near matches, the user is identifying if the submission record is the same or different than the pending near matches. The submission record either matches one of the potential matches or does not match any of them. (See Special Note below.) If the submission record matches a pending near match, the Assign ID button is used to indicate a Match. If the submission record does not match any of the pending near matches, a new ID should be created by clicking the Create New ID button.

The following buttons/functions are available when resolving a pending near match:

Cancel All Checked Records: On the initial near match page for the batch, the near match records include a check box. When the Cancel All Check Records button is

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clicked, all near match records that have a checked check box will be canceled. Any unselected near matches will remain in the pending near match queue.

Cancel All Near Match Records For This Batch: On the initial near match page for the batch, all of the pending near matches can be canceled. When the Cancel All Near Match Records For This Batch button is clicked, all pending near matches for the entire batch will be canceled. When this button is clicked, all near matches are removed for the batch.

Assign ID: This decision is the same as a Match decision described above. When the Assign ID button is clicked, the submission record will retrieve the identifier of the selected student. When this button is clicked, all other near matches for the submission record are removed.

Create New ID: This decision is the same as a No Match decision described above. When the Create New ID button is clicked, the submission record will generate a new identifier for the student. When this button is clicked, all other near matches for the submission record are removed.

Cancel Record: When this button is clicked, the pending near match is canceled. All pending near matches for this submission record are canceled. This only cancels the specific near match the user is reviewing and does not impact other pending near matches in the batch.

When resolving pending near matches, the Assign ID, Create New ID, and Cancel Record buttons resolve the pending near match for that submission record. That is, if one of these buttons is clicked, all other pending near matches for the submission record are considered resolved. For example, if I am reviewing a submission record that has three (3) potential near matches and I click the Assign ID button for one of the three near matches, the other two are eliminated and the identifier for the selected ID will be assigned.

Additional details on these buttons is provided below.

NOTE: System Administrators can enable/disable the above functionality based upon implementation needs. If the functionality is not enabled by the System Administrator, the functionality will not be available.

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Special Note about Near Matches:

The process of making a near match decision is important to the unique identification of student records. When making a decision, please review the information in detail to ensure you are making the correct decision. The following issues can arise from poor near match decisions:

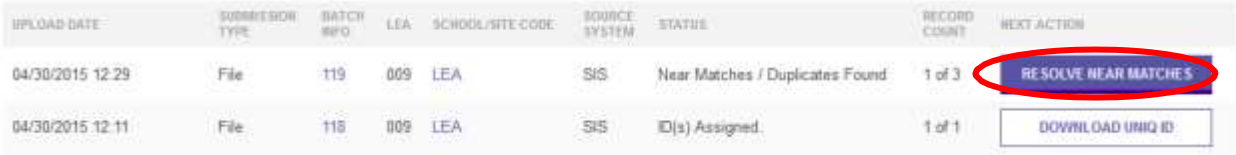
- Matching a submission record to the wrong master record will create a shared identifier. That is, if the submission record is actually a different student than the one being compared and assigned, the submission record is linked to the wrong master record. This means two different student records share the same unique identifier. In this case, please alert your System Administrator so he/she can review and resolve the identifier issue.

- Creating a new identifier for a student when there is a match will create a duplicate record. That is, if the submission record is actually the same student as a master record, but the user clicks Create New ID, the submission record becomes a new unique identifier. This means the same student has two different unique identifiers. When this happens, the next time the student is submitted to the application, both records will likely appear as a near match. In this case, please alert your System Administrator so he/she can review and resolve the identifier issue.

Steps

To resolve near matches, users should perform the following steps:

1. Click the RESOLVE NEAR MATCHES button on the home page.



UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	LEA	SCHOOL/SITE CODE	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
04/30/2015 12:29	File	119	009	LEA	SIS	Near Matches / Duplicates Found	1 of 3	RESOLVE NEAR MATCHES
04/30/2015 12:11	File	118	009	LEA	SIS	ID(s) Assigned.	1 of 1	DOWNLOAD UNIQ ID

2. Review the Resolve Near Matches/Duplicates list page for information about the records.

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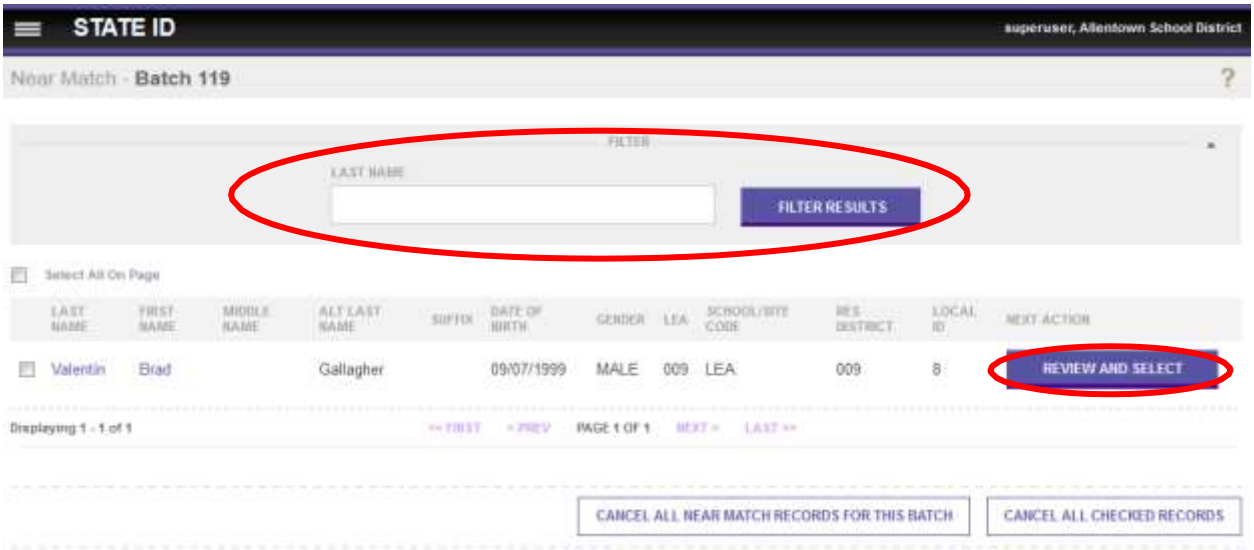
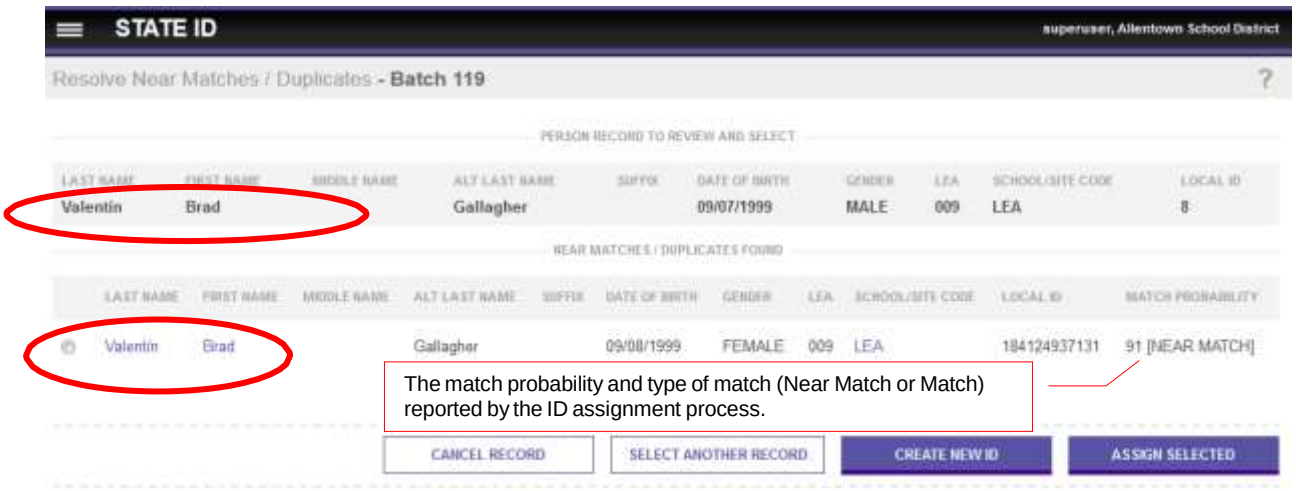


3. Click the **REVIEW AND SELECT** button or the hyperlinked name to view additional details about the Near Match and to resolve the issue.

> ***NOTE:*** *The Near Match List can be filtered by typing the Last Name of the student in the Last Name field and clicking the Filter Results button. This filter allows the user to display only the results within that batch which meet the filter criteria. Portions of names can be used for this search.*

4. Review the Resolve Near Matches / Duplicates details page. The top section displays the submitted student and the bottom section displays a list of matching student records:



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The purpose of the above page is simply to decide if the student under review is the same as one of the matching student records or if the student under review is a brand new student. The links in the **Last Name** and **First Name** columns will navigate the user to the Compare student Information interface. That page will display the record to be resolved along with the matching student record in detail. The link in the **School Code** column provides details about the school, including school name and contact information.

To review the comparison details on the Compare student Information page, proceed to step 5. To review School Details, proceed to step 7. To continue without a review, proceed to step 8.

5. Click the hyperlinked **Last Name** or **First Name** to view the Compare student Information page. The page, as shown below, displays the submitted student in the "Submission Record" column on the left and the matching student in the "Master student Record" column on the right of the page.

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eScholar

Personalized education starts at eScholar.

STATE ID

superuser, Allentown School District

Near Match - **Compare** - Batch 119

?

91

MATCH SCORE

Brad Valentin (SUBMISSION)

GENDER: MALE DATE OF BIRTH: 09/07/1999 LOCAL ID: 8 SSN: Not Present

vs

Brad Valentin (#1152474588)

GENDER: FEMALE DATE OF BIRTH: 09/08/1999 LOCAL ID: 184124937131 SSN: Not Present

COMPARE RECORDS

The different field values between the submission record and the master record are highlighted.

FIELDS	SUBMISSION RECORD	MASTER RECORD (STATE ID: 1152474588)	ADD NOTE
FIRST NAME	Brad	Brad	
LAST NAME	Valentin	Valentin	
MIDDLE NAME			
SUFFIX			
ALT LAST NAME	Gallagher	Gallagher	
DATE OF BIRTH	09/07/1999	09/08/1999	
GENDER	MALE	FEMALE	
SSN	Not Present	Not Present	
LEA	009-*-Allentown School District	009-*-Allentown School District	
SCHOOL/SITE CODE	LEA-*-Allentown School District	LEA-*-Allentown School District	
RES DISTRICT	009	009	
GRADE PLACEMENT	Tenth	Tenth	
ENDING SCHOOL SESSION LEA	2015	2015	
SOURCE SYSTEM	SIS	SIS	
LOCAL ID	8	184124937131	
STATE ID		1152474588	
ALTERNATE ID			
ALTERNATE SOURCE			
STREET ADDRESS PHYSICAL	20 Columbus Ave	20 Columbus Ave	
CITY PHYSICAL	Stamford	Stamford	
STATE	VA	VA	
ZIP CODE PHYSICAL	06905	06905	
PARENTAL CONSENT FLAG	No	No	
SERIAL #	51206	51187	
CREATED	04/30/2015	04/30/2015	
LAST UPDATED	04/30/2015	04/30/2015	
COMMENTS	1152474588;		
MATCH NOTES			

RETURN TO LIST | CANCEL SUBMISSION | CREATE NEW ID | ASSIGN SELECTED

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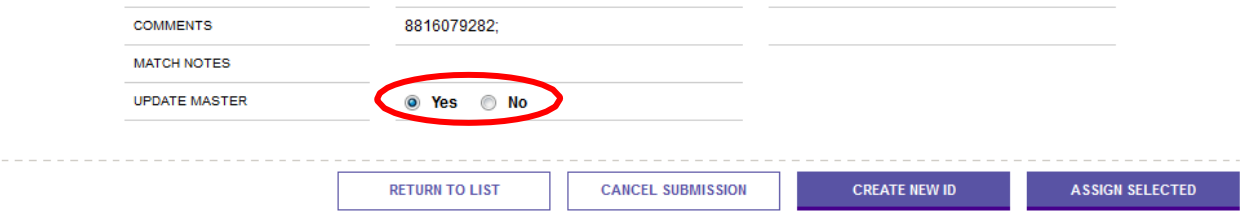
TIP: *All fields in which the information differs between two student records is highlighted.*

TIP: *If a near match was forced by the application, the application will put the reason for the near match within the "Match Notes" row. This may include a note about the Twins Rule, SSN Rules or other forced near match scenarios.*

TIP: *With some implementations the* ***Social Security Number*** *field will display as an actual value and in other implementations it will be masked (e.g., ###-##-####). Regardless, if the social security number is masked or not, the application will highlight that field with italics and render the background color yellow when it differs between the student records.*

NOTE: *Users can add student Notes from the page above. For more information on student Notes, please refer to the Person Note section on page 81.*

6. If the submission record matches the master record and the user has authorization to update the master data, the application will display an "Update Master" option. This option only applies if the Assign Selected match decision button is clicked.
   a. Option "No" – The submission record will be assigned when the "Assign Selected" button is clicked, but the master data will not be updated with the submission record information.
   b. Option "Yes" – The submission record will be assigned when the "Assign Selected" button is clicked and the master data will be updated with the submission record information.



7. Decide how the near match should be resolved. To resolve a near match a user can assign an ID, create a new ID or cancel the record. A near match is only resolved once, so once you click a decision button the near match is resolved. Once a decision is submitted, it cannot be reverted.

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a) If the student under review is the same as master record, the user should click the ASSIGN SELECTED button. When the ASSIGN SELECTED button is clicked the user is indicating that the submitted student is the same as the master record and the unique identifier will be retrieved and linked to the submission record.

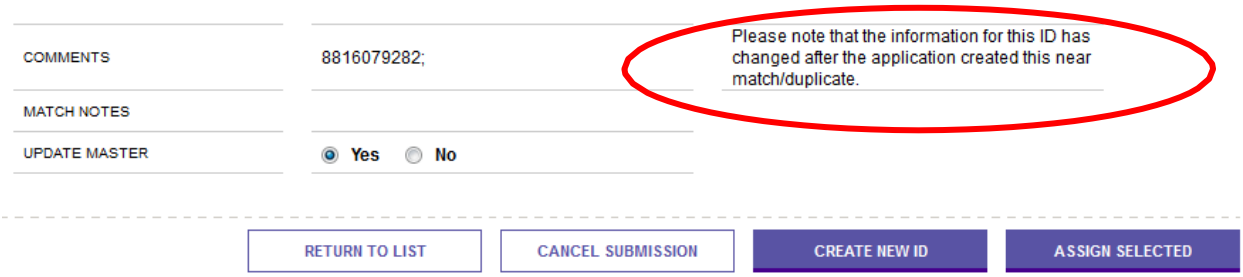
b) If the student under review is different from the master record, the user should click CREATE NEW ID button. When the CREATE NEW ID button is clicked, the user is indicating that the submitted student is different than the master record and a new ID will be created for the submission record.

c) If the user wishes to cancel the record under review, the user should click the CANCEL SUBMISSION button. When the Cancel Submission button is clicked, the pending near match will be canceled. If a pending near match is canceled, no ID is assigned or created and the record must be resubmitted to the application.

d) Users can also navigate back to the list of Near Matches by clicking RETURN TO LIST.

NOTE: *With some implementations, the* ***Assign Selected/Match****,* ***Create New ID/No Match*** *or* ***Cancel Record*** *buttons could be disabled.*

In some instances the application may not display highlighted differences between the submission and master record. This can occur when the master record was updated after the near match was created and this update changed the data to the same data as in the submission record. When this occurs, the application displays a message in the Comments row as shown below.



The appearance of this page is dependent on the implementation and configuration of the application. System administrators may enable/disable features which impact the display of the page.

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Field Descriptions:

Field	Description
Source System	Each upload includes the source system name of the submission. The source system name that is submitted in the file will be displayed on this page.
Serial #	The serial number is the reference ID for this record. Administrators can use this ID to review additional details.
Created	The date the record was created in the application.
Last Update	The date the record was last updated by a submission record in the application.
Comments	If the master record has been updated since the near match was created or if there are other record comments, the application will display the comments in this section. For the submission record, the state ID of the matched record will be displayed.
Match Notes	If a near match was forced due to a rule configured by the System Administrator, the Match Notes section will display the reason. This may include the Twins Rule or SSN Rule. This information may help the user identify why a record is a near match if it is not clear based upon the data.
Update Master	If this flag is set to Yes and the Assign ID button is clicked, the submission record will overwrite the master data. If the flag is set to No and the Assign ID button is clicked, the submission record will not overwrite the master data. If any button other than Assign ID is clicked, this flag has no impact.

8. Click the appropriate decision button (ASSIGN SELECTED , CREATE NEW ID , or CANCEL SUBMISSION) or click the RETURN TO LIST button to return to the Resolve Near Matches / Duplicates details page.
9. From the near match summary page, users can view additional details if necessary. On the Resolve Near Matches/Duplicates page, users can view information about the school of the matching student by clicking the link in the School Code column:

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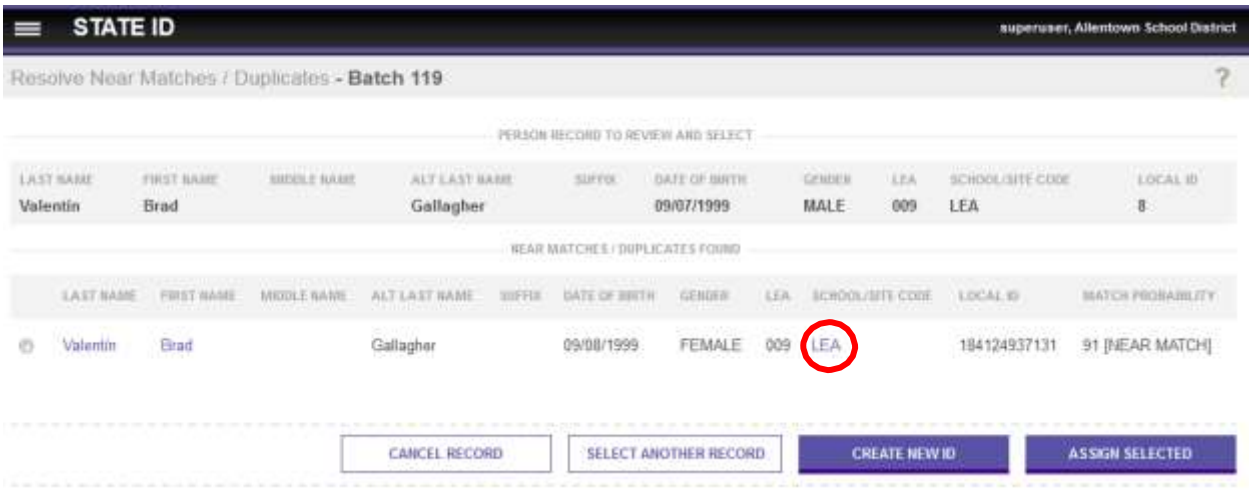

SCHOOL INFORMATION: **Allentown School District**

LEA	009
LEA NAME	Allentown School District
SCHOOL/SITE CODE	LEA
SCHOOL/SITE CODE NAME	Allentown School District
STREET	123 Main St
CITY	Mock City
STATE	XL
ZIP	10601
CONTACT	Mr. Principal
TITLE	Principal
PHONE	2125550000
FAX	2125550000
EMAIL	fake@email.xyz
EMAIL 2	fake@email.xyz

CLOSE WINDOW

10. If a decision was not made on the prior page and the user clicked on the RETURN TO LIST button, the user can make a decision on the near match summary page.

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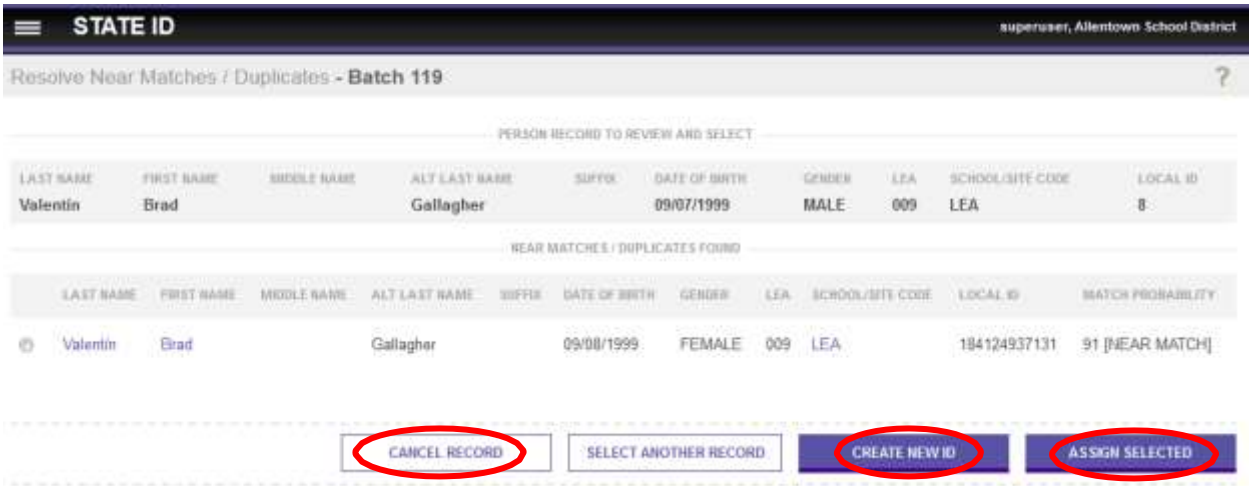
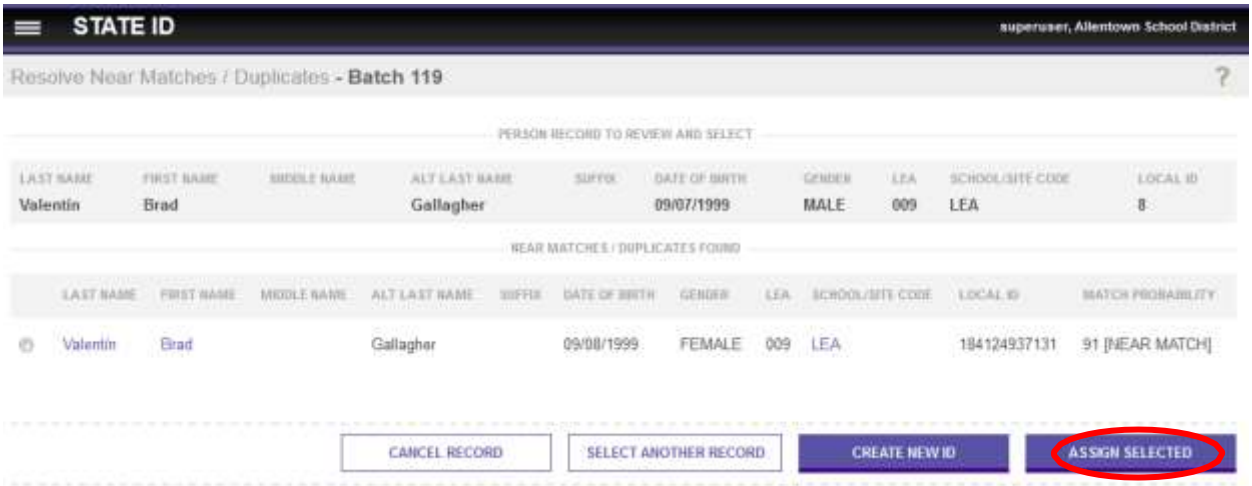
11. Decide how the near match will be resolved. As mentioned above, to resolve a near match a user can ASSIGN SELECTED, CREATE NEW ID, or CANCEL RECORD.



For more details on these buttons, please refer to the [Resolving Near Matches](#) information beginning on page 36.

e) If the student under review is the same as one of the matching student records, the user should select the radio button to the left of the matching student and then click ASSIGN SELECTED.



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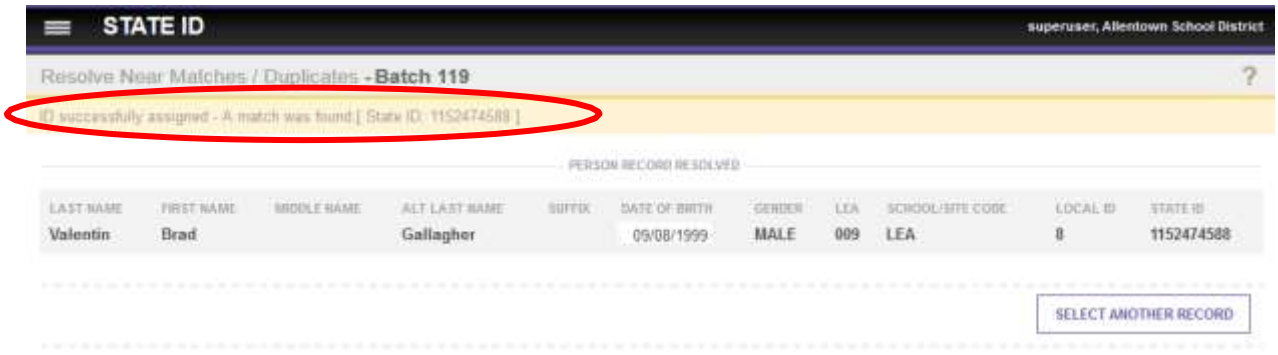
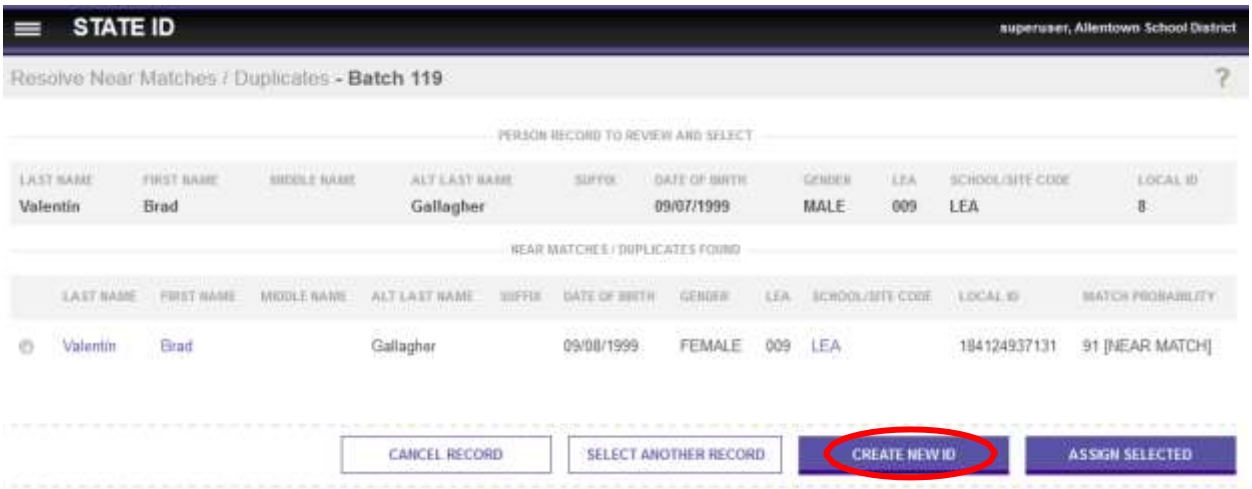
A confirmation message will be displayed at the top of the page.



f) If the student under review is different from the matching student records, the user should click CREATE NEW ID.



A confirmation message will be displayed at the top of the page.

g) If the user wishes to cancel the record under review, the user should click the CANCEL RECORD button.

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h) Users can also navigate back to the list of Near Matches by clicking SELECT ANOTHER RECORD.

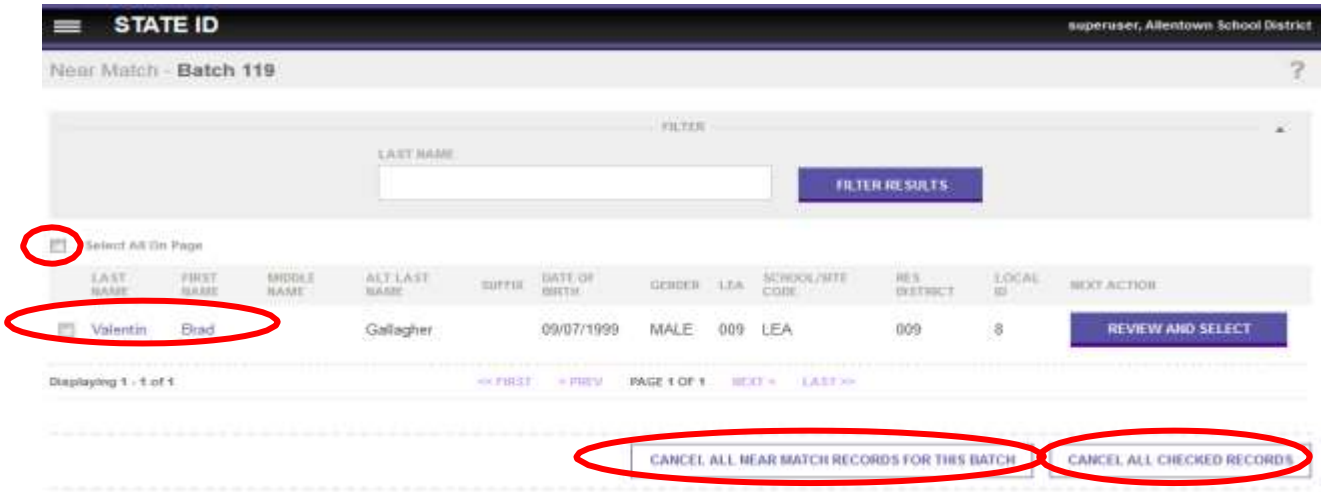
> ***NOTE:*** *With some implementations, the* ***Assign Selected/Match****,* ***Create New ID/No Match*** *or* ***Cancel Record*** *buttons could be disabled.*

Canceling Near Matches

In addition to being able to cancel a record from the Resolve Near Matches / Duplicates page shown above, records can also be canceled from the Resolve Near Matches / Duplicates home page when this feature is enabled by a System Administrator.

To cancel records, users should check the box(es) to the left of the record(s) and then click the CANCEL ALL CHECKED RECORDS button. Users can select all records on the page by selecting the **SELECT ALL IN PAGE** checkbox before clicking CANCEL ALL CHECKED RECORDS.

To cancel all records in the batch, users should click the CANCEL ALL NEAR MATCH RECORDS FOR THIS BATCH.



> ***NOTE:*** *The list of Near Match records may span two or more pages. The* ***Cancel All Near Match Records for This Batch*** *button cancels all near matches in the batch list, not just the batches displayed on an individual page. The* ***Cancel All Checked Records*** *button only cancels those batches that are selected.*

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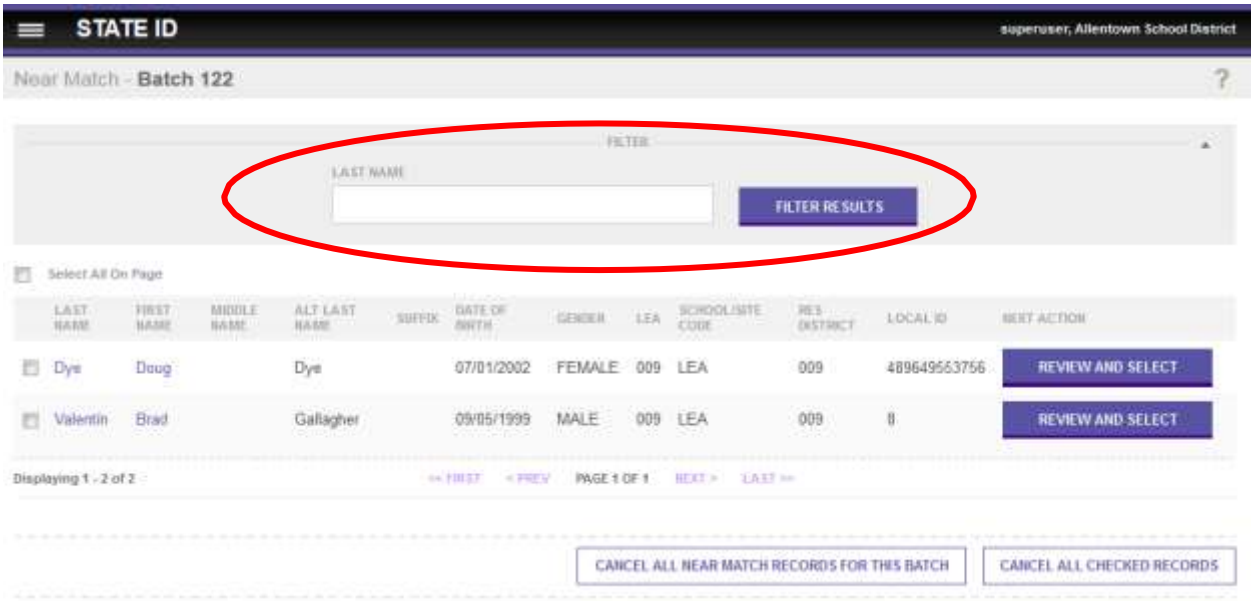
Once all records are resolved, the next step in the process is to Download the ID on page 57.

Filtering Near Matches

To filter the list of names on the Resolve Near Match/Duplicates page, type the last name or partial last name of the student in the Last Name text box and click the FILTER RESULTS button. This will filter the listing to only the last names matching the filter.



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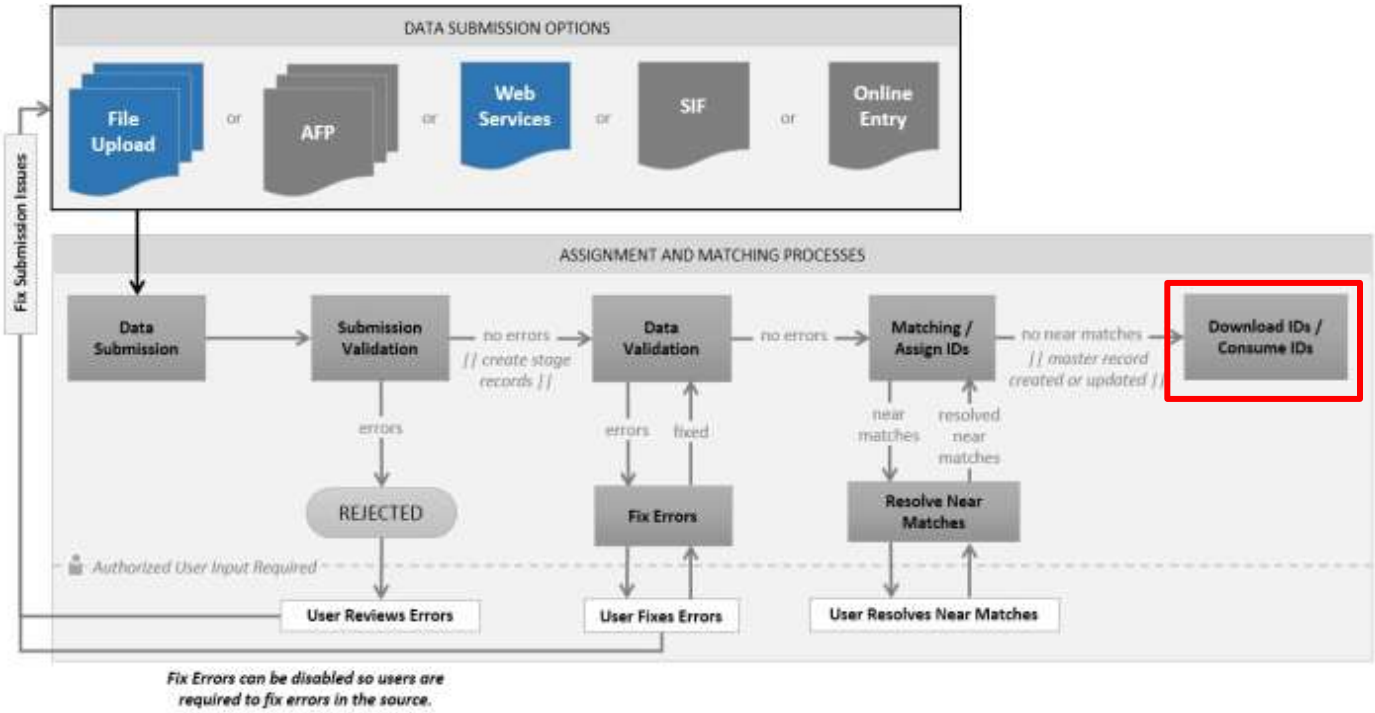
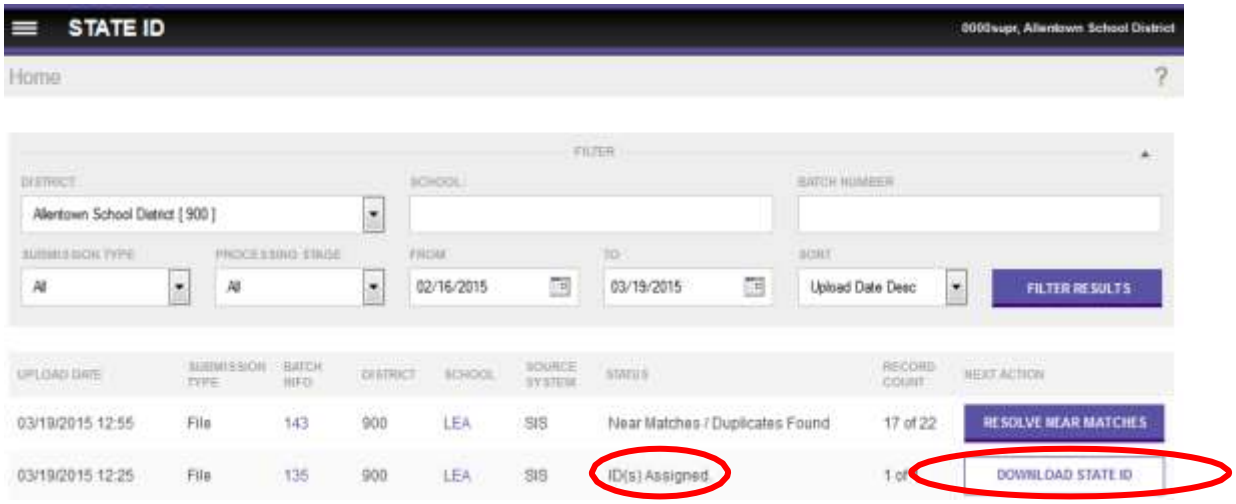
STEP 4: DOWNLOADING IDS



About Downloading IDs

Upon completion of the steps described above, the application home page will display the status of the batch as "ID Assigned" and a DOWNLOAD STATE ID button in the Next Action column.



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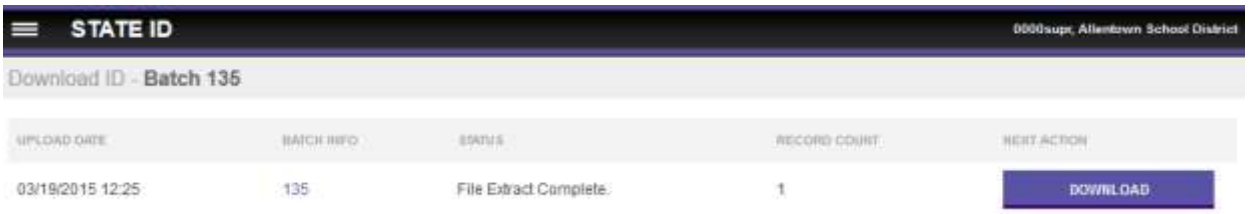
Steps

To download the IDs for the batch, users should perform the following steps:

1. Click the DOWNLOAD STATE ID button on the application home page for the appropriate batch.
2. Download the IDs Assigned file by clicking the DOWNLOAD button. Doing so will open a File Download dialogue box that enables users to either open the file or save it to your local computer.



3. The format of the downloaded file will be exactly the same as the student Batch File and each student record will include the ID that was assigned to that student.

NOTE: *The downloaded file can be used to update a user's Student Information System or other data systems.*

Batch Information

Users can click the Batch Info link to display the status of the batch file and its records prior to downloading. Please see Appendix A on page 136 for more information on the Batch Info window.

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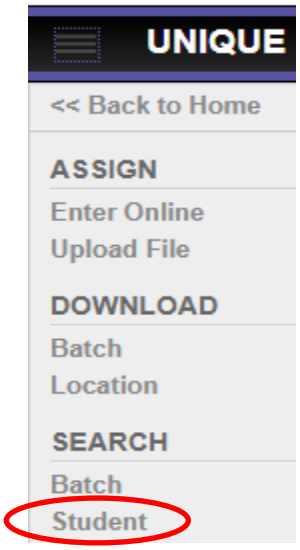
SEARCH > BY STUDENT

About Search By Student



Users can search for student records online by clicking the student (or whatever name has been selected by your organization for student) link under **SEARCH** from the *Main Menu*:

This feature allows users to:

- Search for student records online.
- View student information.
- Edit student information.
- Add a student note.
- View student notes.

Some implementations may disable this feature for certain or all users. In such an instance, the link will not appear on the Menu.

Depending upon system configuration, the student Search functionality may use a SQL search type or a Matching Engine search type. The SQL Search option allows for partial names, but will produce results that may not represent the search performed during assignment. The Matching Engine search will be stricter, but will produce a closer result to the search performed during assignment.

Steps

To search for student records using this feature, users should perform the following:

1. Click on the student link under **SEARCH** from the *Main Menu*.
2. Click on the appropriate search tab. This module has three types of searches available: Basic Search, Advanced Search, and ID Search.

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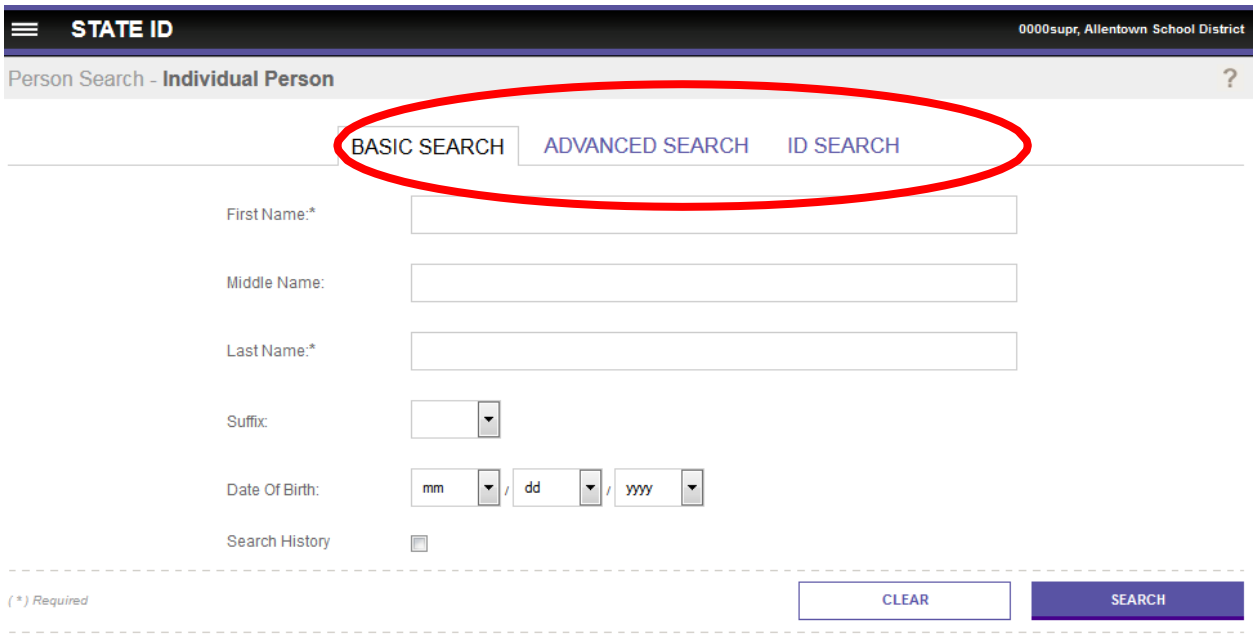
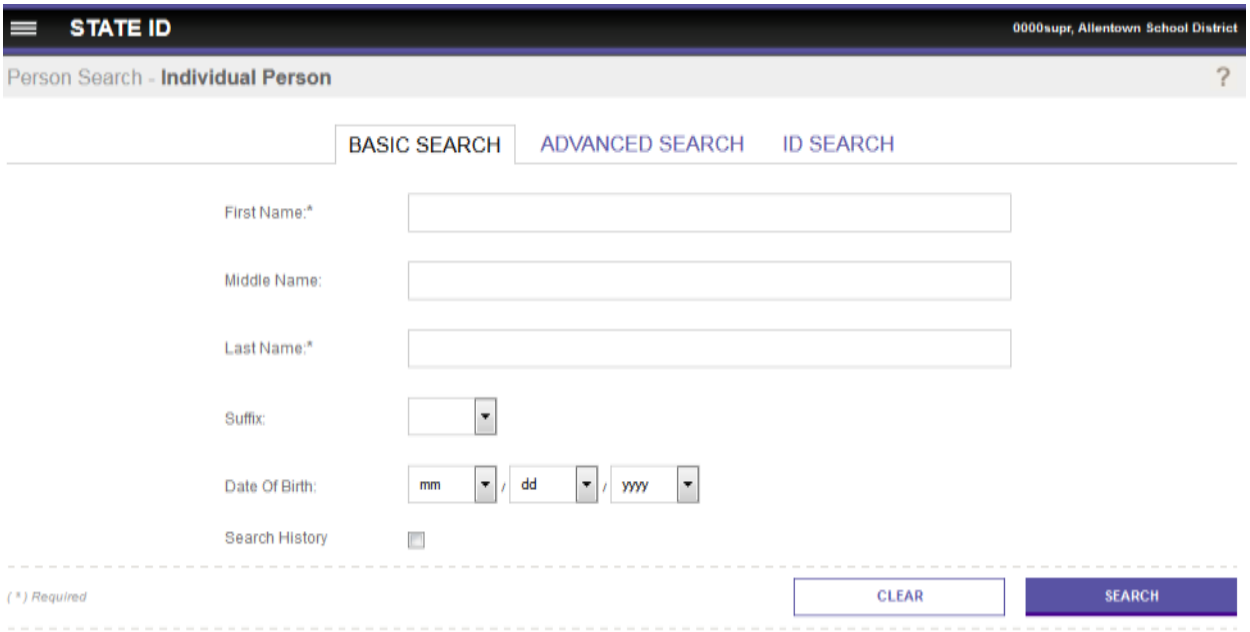


NOTE: *The type of search that appears (which tabs) when a user initially enters this module can differ from implementation to implementation.*

Basic Search

Basic Search allows users to search for a student using basic demographic information.



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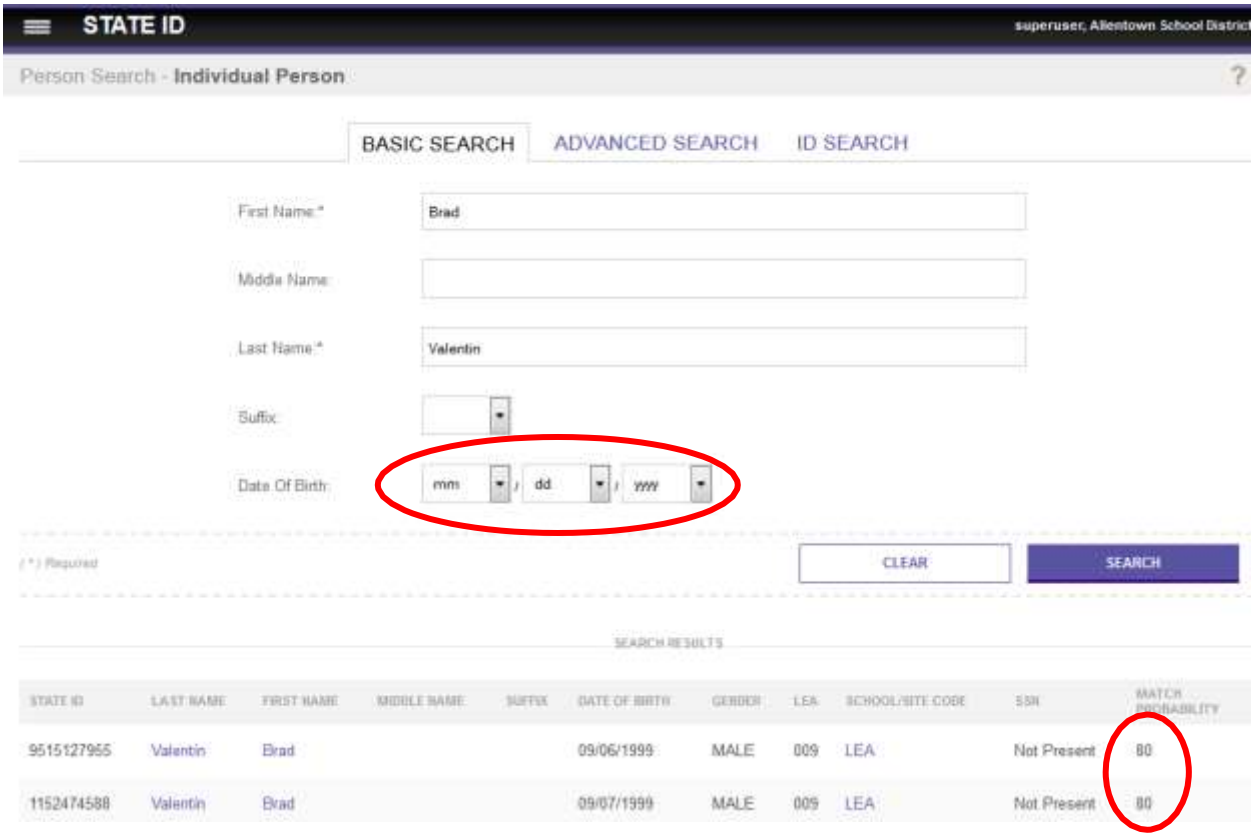
NOTE: *First Name and Last Name are required for both the Basic Search and Advanced Search. Wild card characters (e.g.,*, %, _,?) are not supported.*

Search without a date of birth:



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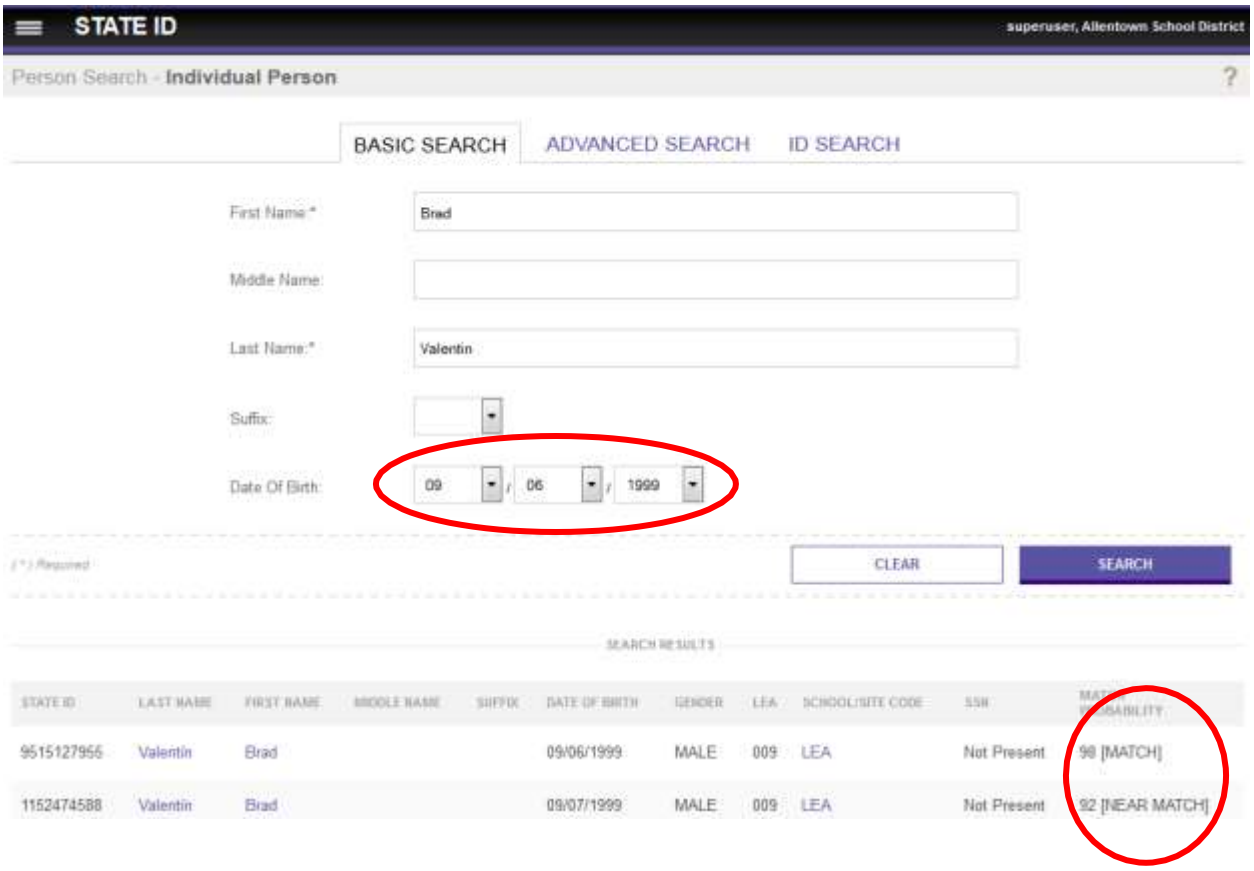
Search with date of birth:



NOTE: *To reduce the number of results returned, enter as much information as possible into the form. If minimal information is entered, such as just first and last name, the number of results displayed will be higher than if more details are included in the search criteria.*

NOTE: *The Match Probability generated in the student Search component could differ from that in the ID Assignment process based on System Configurations and matching fields provided by the user.*

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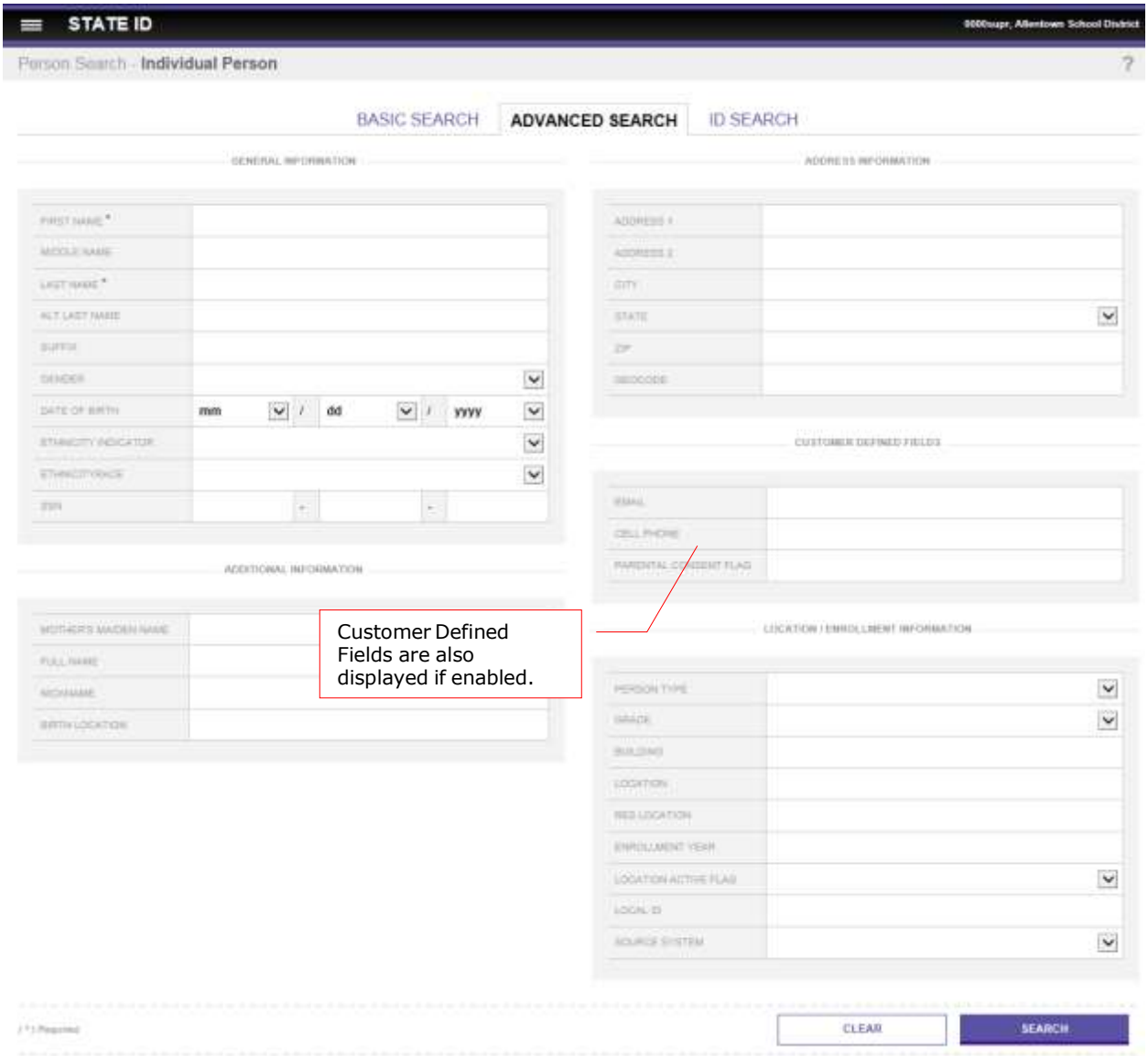
Advanced Search

Advanced Search allows users to search for a student using all available fields. This includes any Customer Defined Fields, Address Information, and Additional Information that have been configured by the System Administrator.



NOTE: *The Matching Engine will use First Name, Middle Name, Last Name, Alternate Last Name, Gender, Date of Birth and SSN to determine a match score. Any additional fields will be used to filter out results after a match score has been generated. Users should first search using the matching fields and then use the other fields to narrow down the results.*

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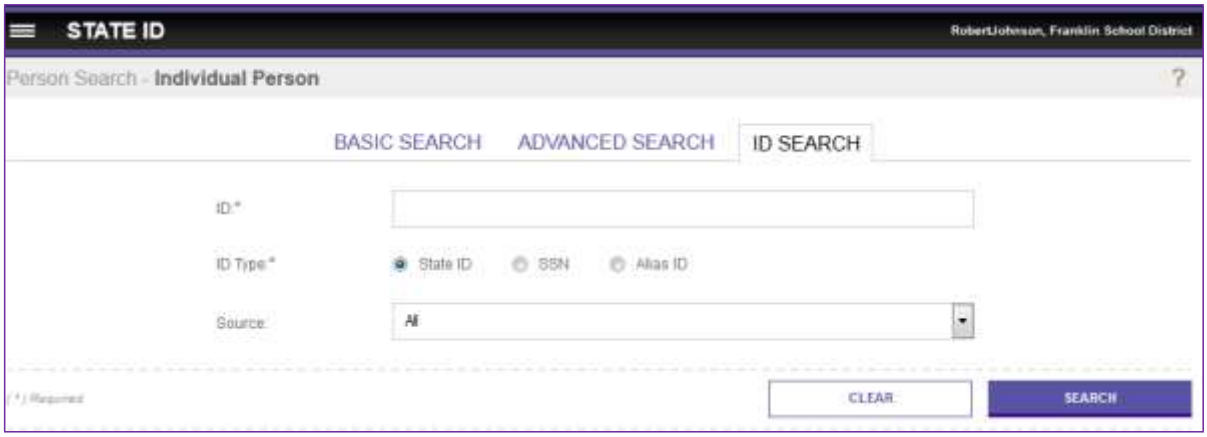
ID Search

ID Search allows users to find student records using various IDs. Users will be able to search using State ID, SSN, Alias ID, all from the same page.



3. Enter search criteria. Pay special attention to required fields for the search type.

4. Click the SEARCH button.

NOTE: *In this module, the application will search against the current information for student records who have been assigned an ID. Searching for a student's history information (e.g., previous school code) may not return desired results.*

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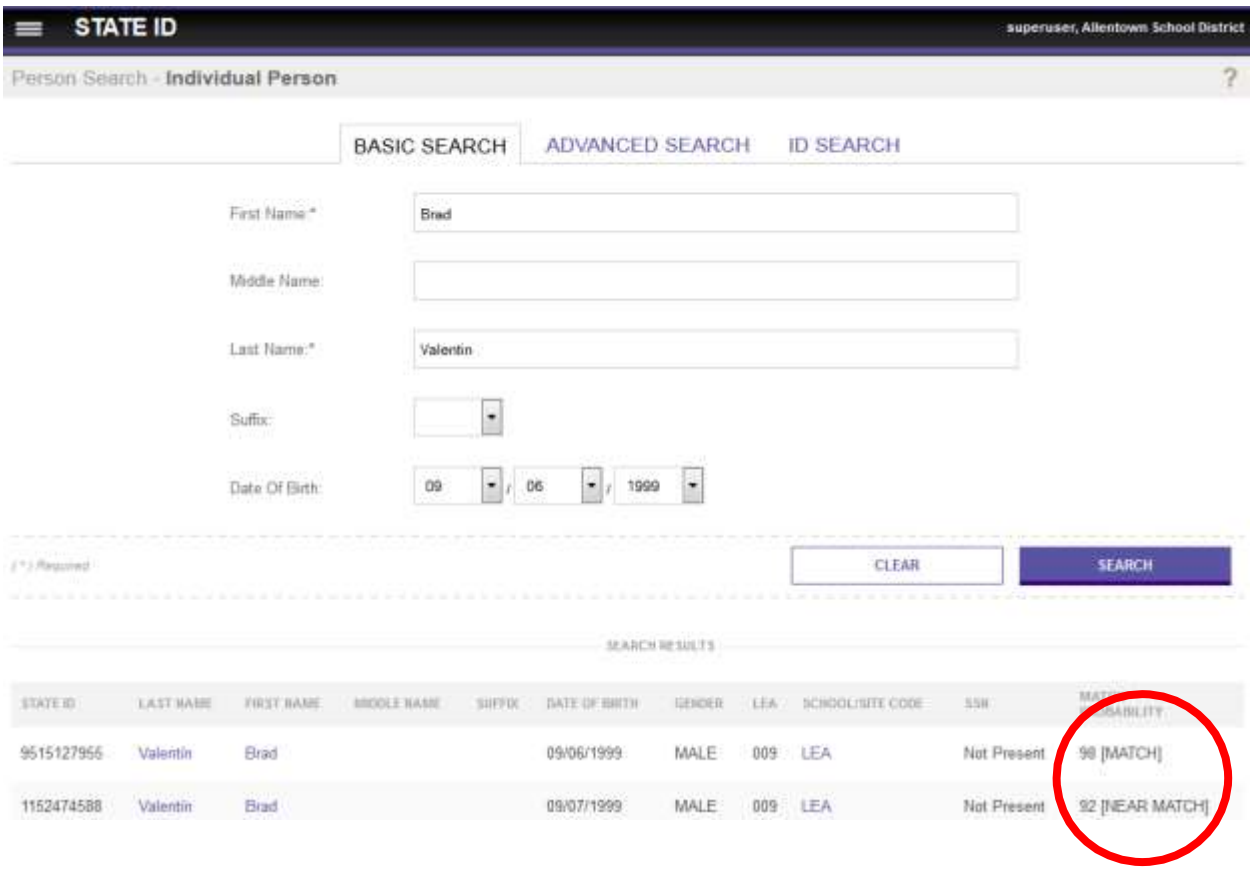
Viewing the Search Results

Records Found

After the Search button is clicked, the application will display the results of the search. When one or more student records are found, the application displays the matching records. The match probability will be displayed if the Matching Engine is the search type defined by the system administrator. The match probability will not be displayed if SQL Search is the search type and/or when using thenID Search tab. The closest match displays as the first result in the list.



NOTE: *There is an application-level setting that allows clients to change the type of search users can perform. One type is a Matching Engine Search that uses the eUID application matching engine to find student records. The other type is a SQL Engine Search that uses basic database queries to find student records. With the later, this module will perform right truncation searches. For example, searching for the student "Smith" will also return the student "Smithson." In addition, no Match Probability will display with SQL Engine Searches.*

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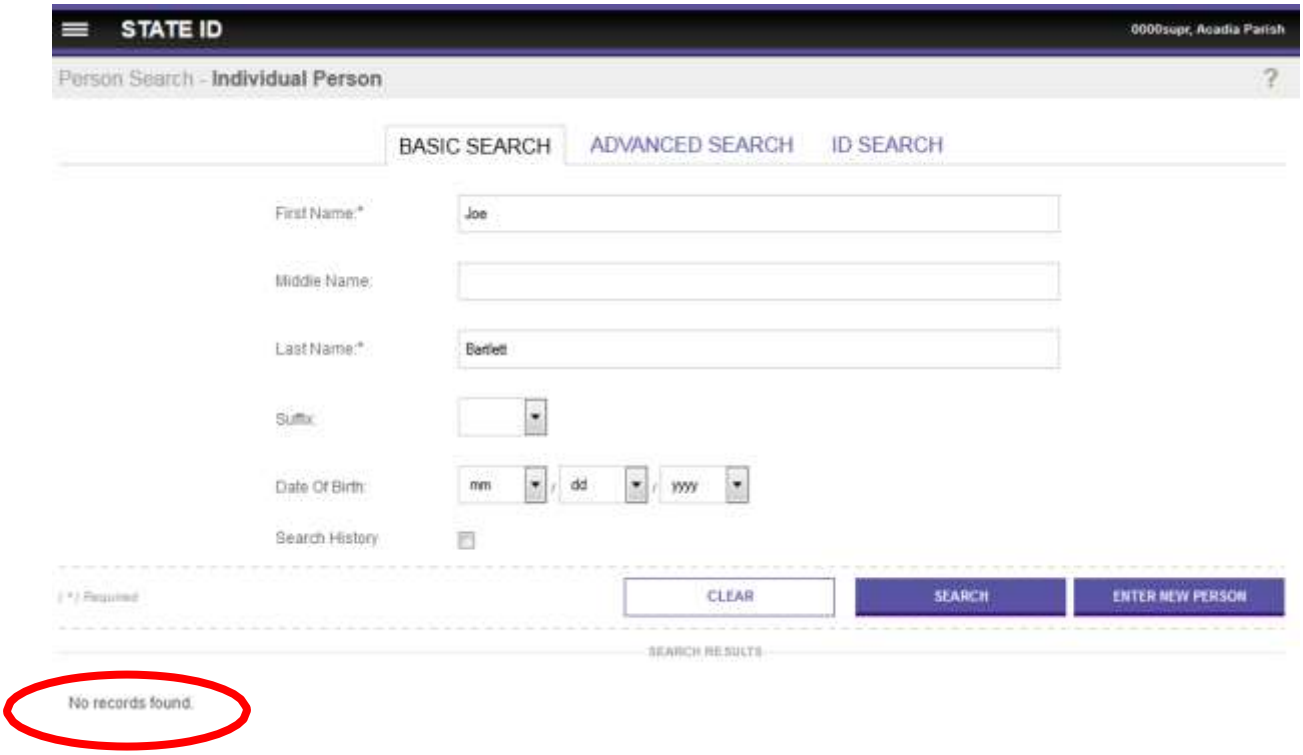
No Records Found

This can include a “No Records Found” status or a list of matching results. If no matches are found for the search criteria, the application displays a message under the search form. When this occurs, users should adjust the search criteria if necessary.



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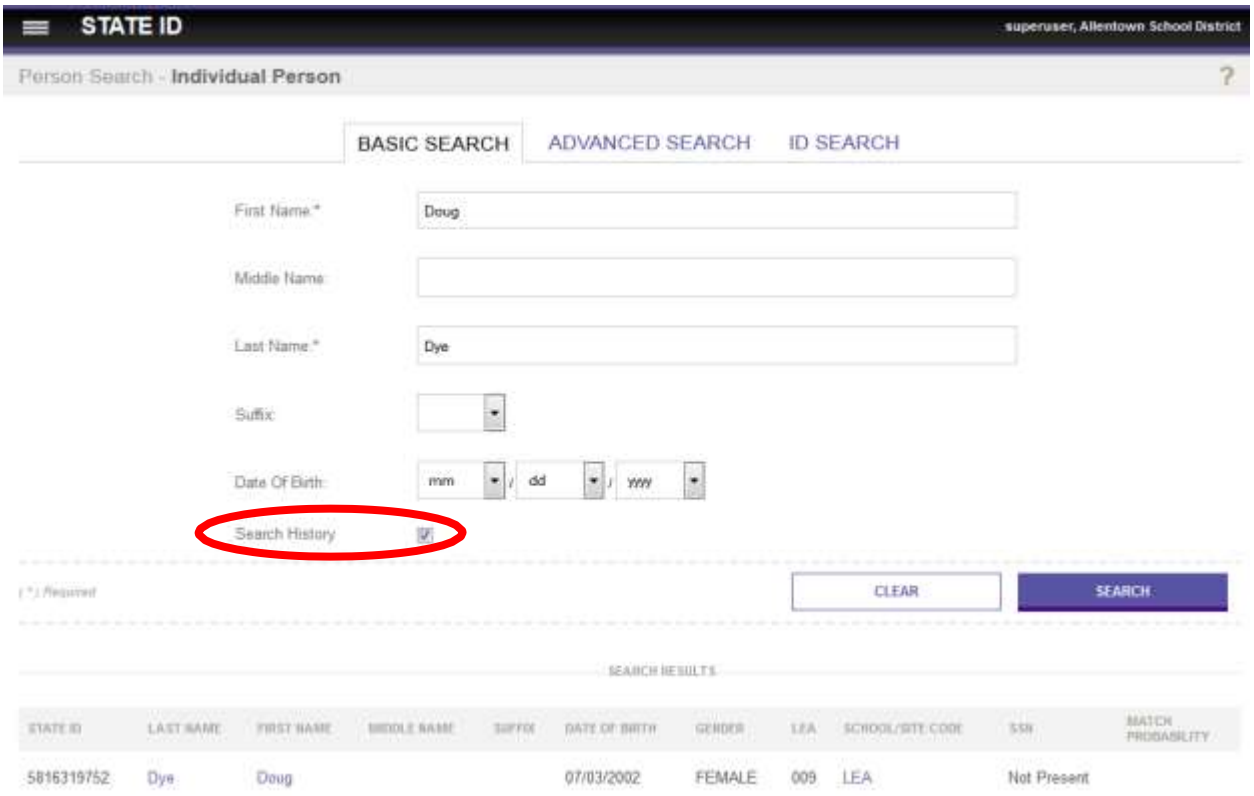
Search History

When SQL Server is the search type defined by a System Administrator, there is also a Search History option. When this checkbox is selected, the application will perform a search of history records for the information entered into the form. This may produce many results for one student.



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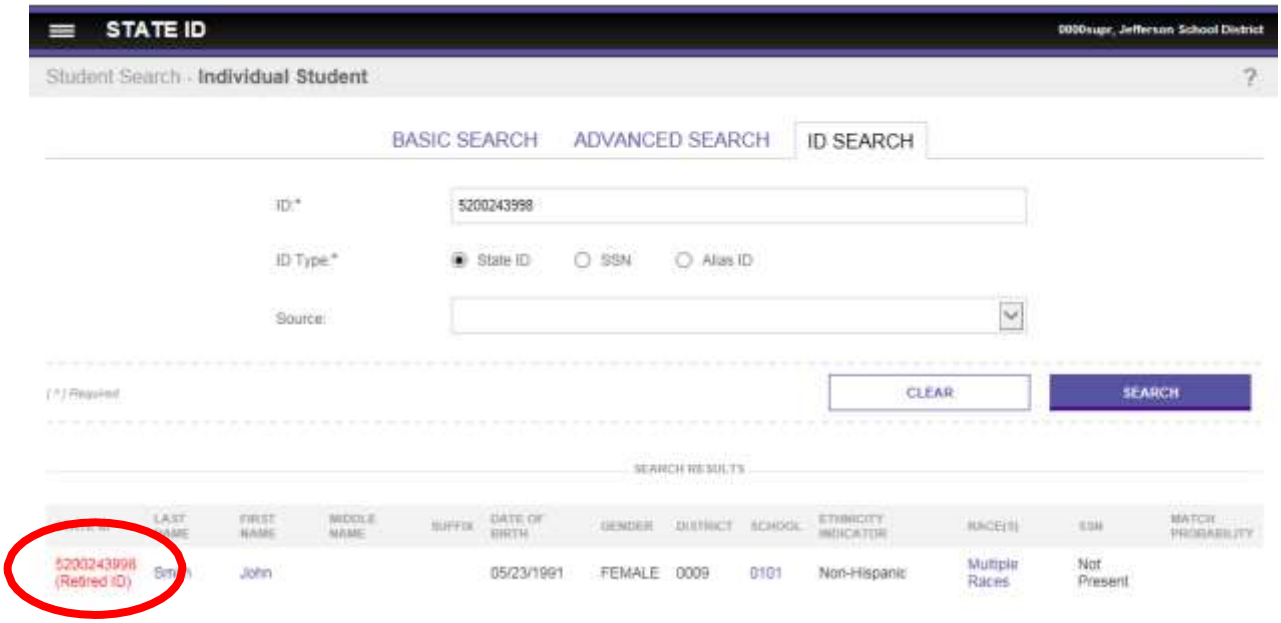
Retired IDs

As of eUID v9.0, users can also search for Retired IDs using the ID Search page and entering the State ID. After entering the State ID, the results will be displayed in the Search Results List highlighted in Red. Searching by SSN or Alias ID will not return retired records.



To view the Retired ID record, click on the name hyperlink. The Retired student Information page will be displayed with “RETIRED ID” noted in red next to the State ID. In addition, all associated Active ID information will be listed in the bottom section of the page.

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eScholar

Personalized education starts at eScholar.

STATE ID

0000supr, Jefferson School District

Student Search - **Individual Student Information**

John Smith (Retired ID) 5200243998

GENDER: FEMALE DATE OF BIRTH: 05/23/1991 LOCAL ID: 593339154468 SSN: Not Present PERSON TYPES: Student LAST UPDATED: 06/06/2016 13:10 CREATED: 06/06/2016 10:57

RETIRED MASTER RECORD RETIRED HISTORY ASSOCIATED IDs

REASON FOR RETIREMENT: Duplicate created by user

GENERAL INFORMATION

FIRST NAME	John
MIDDLE NAME	
LAST NAME	Smith
ALT LAST NAME	
SUFFIX	
GENDER	FEMALE
DATE OF BIRTH	05/23/1991
ETHNICITY INDICATOR	Non-Hispanic
ETHNICITY/RACE	Black (Non-Hispanic)
SSN	Not Present
STATE ID	5200243998

CUSTOMER DEFINED FIELDS

EMAIL	90 Morgan St
CELL PHONE	Norwalk
PARENTAL CONSENT FLAG	LA

BATCH INFORMATION

LAST BATCH #	1121
LAST UPDATED	06/06/2016 13:10
UPDATE REFERENCE #	47639
INPUT TYPE	Batch
CREATED BY	0000supr
EMAIL ADDRESS - CREATED BY	
CREATED	06/06/2016 10:57
STATUS	Moved to Associated ID at Retirement
COMMENTS	moved to associated ID : 4764462648 due to retirement of original State ID : 5200243998 , Admin Ref. Number : 47

LOCATION / ENROLLMENT INFORMATION

GRADE	
SCHOOL	0101 James Madison High School
DISTRICT	0009 Jefferson School District
RES DISTRICT	
SCHOOL YEAR	
LOCAL ID	593339154468
SOURCE SYSTEM	Default
ALTERNATE ID	
ALTERNATE SOURCE	
LAST UPDATED	06/06/2016 13:10
CREATED	06/06/2016 13:10

BACK TO SEARCH RESULTS

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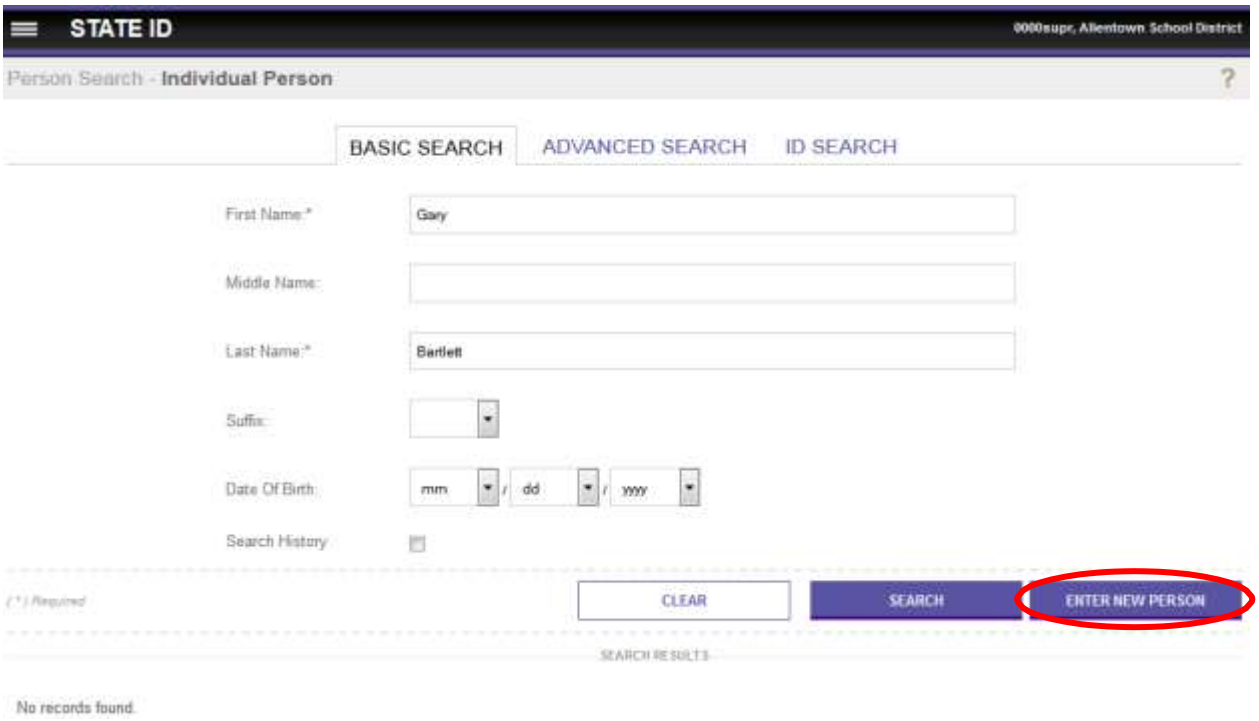
Enter New student

When a valid search is performed but there are no matches or only one near match below the Upper Near Match Threshold, the application will display an “Enter New student” button when this feature is enabled by the System Administrator. For more information about this feature, refer to the Enter New student section below.



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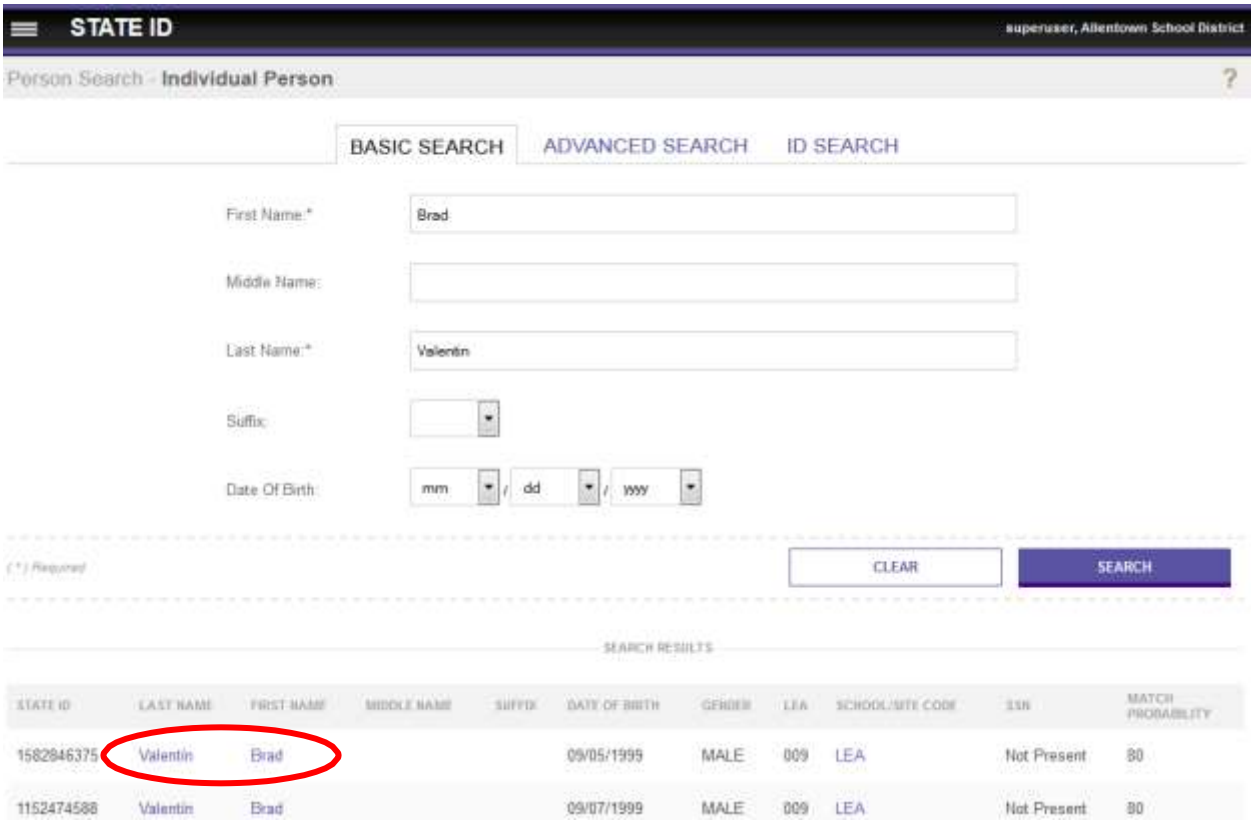
Viewing Individual student Information

When results are returned, the user should perform the following:

a. To view more detailed information about the student, users should click the hyperlink in the “Last Name” or the “First Name” column.



b. Upon clicking the hyperlink, the **Search Individual student** information page will be displayed. The **Search Individual student information** page will display the student’s current information.

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STATE ID

Student Search - Individual Student Information

Brad Valentin 7736612757

MASTER RECORD | HISTORY | ASSOCIATED RETIRED IDs | ENROLLMENT | ADD NOTE

GENERAL INFORMATION

FIRST NAME	Brad
MIDDLE NAME	
LAST NAME	Valentin
ALT LAST NAME	
SUFFIX	
GENDER	MALE
DATE OF BIRTH	09/05/1999
ETHNICITY INDICATOR	
ETHNICITY/RACE	White (Non-Hispanic)
ETHNIC SUB GROUP	
SSN	Not Present
STATE ID	7736612757

ADDRESS INFORMATION

ADDRESS 1	20 Columbus Ave
ADDRESS 2	
CITY	Stamford
STATE	VA
ZIP	12345
GEOCODE	

CUSTOMER DEFINED FIELDS

EMAIL	fakeemail@abcdef.com
CELL PHONE	
PARENTAL CONSENT FLAG	Y

ADDITIONAL INFORMATION

MOTHER'S MAIDEN NAME	Sam Smith
FULL NAME	Brad Valentin
NICKNAME	B
BIRTH LOCATION	
RESIDENCY STATUS	
HIGHEST DEGREE	
CERTIFICATE NUMBER	
CERTIFICATE TYPE	

BATCH INFORMATION

LAST BATCH #	3054
LAST UPDATED	08/12/2016 10:56
UPDATE REFERENCE #	130578
INPUT TYPE	Online
CREATED BY	0000supr
EMAIL ADDRESS - CREATED BY	
CREATED	08/12/2016 10:56
STATUS	New ID Assigned - No Matching Record Found
PROCESSED DATE	
COMMENTS	

LOCATION / ENROLLMENT INFORMATION

PERSON TYPE	Student
GRADE	Grade 10
BUILDING	0101 James Madison High School
LOCATION	0009 Allentown School District
RES LOCATION	0009 Allentown School District
ENROLLMENT YEAR	2017
LOCATION ACTIVE FLAG	Active
LOCAL ID	654654
SOURCE SYSTEM	SIS
ALTERNATE ID	
ALTERNATE SOURCE	
LAST UPDATED	08/12/2016 10:56
CREATED	08/12/2016 10:56

BACK TO SEARCH RESULTS | EDIT STUDENT

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As of eUID v10.0, the student Information page now features a new student Panel which includes basic student demographics as well as four tabs:

Master Record

a. This section allows users to view additional information from the Master record, edit the student, return to the search results or return to the home page.

History

a. This section allows users to view additional information from History records.

Associated Retired IDs

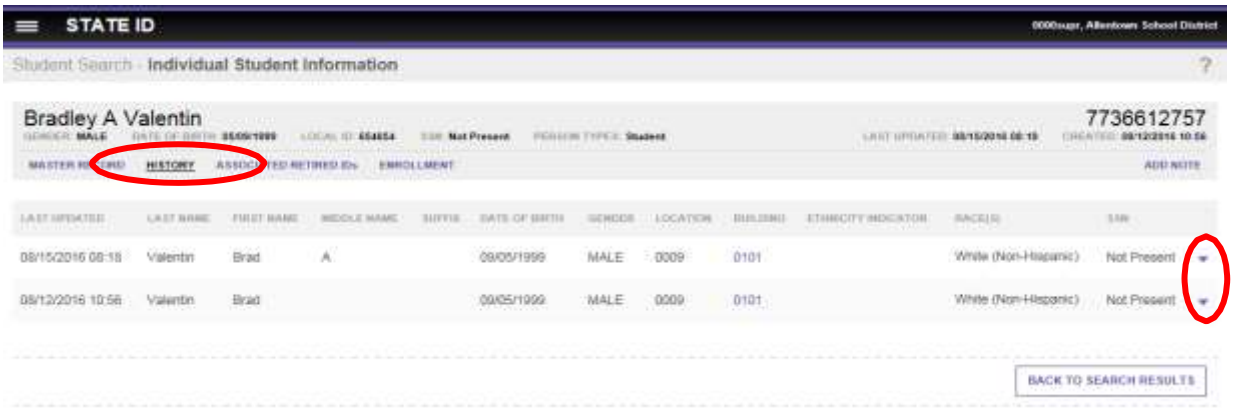
b. This section will display any IDs along with the student information that has been retired and associated to the ID under review.

Enrollment

c. This section allows users to view, add, and edit enrollment events.

NOTE: *If a user navigates between the tabs in student **Search** <u>or</u> navigates to any other module, the application will remember the values that user entered in his/her last search if the "Remember Search" System Property is enabled. When enabled and that user re-enters the student **Search** module, the application will display the values from the user's last search <u>and</u> will automatically re-run the search query. However, once the user logs out of the application or otherwise ends his/her session (closes the browser), the application will no longer remember the last search values. If the property is not enabled, the application will not remember the last search after browsing away from the search page.*

Screenshot from History Tab:



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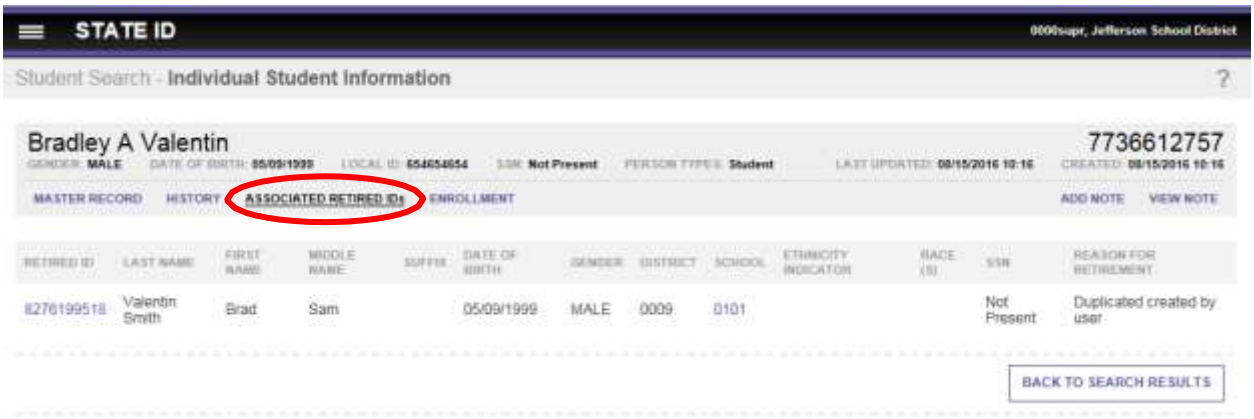
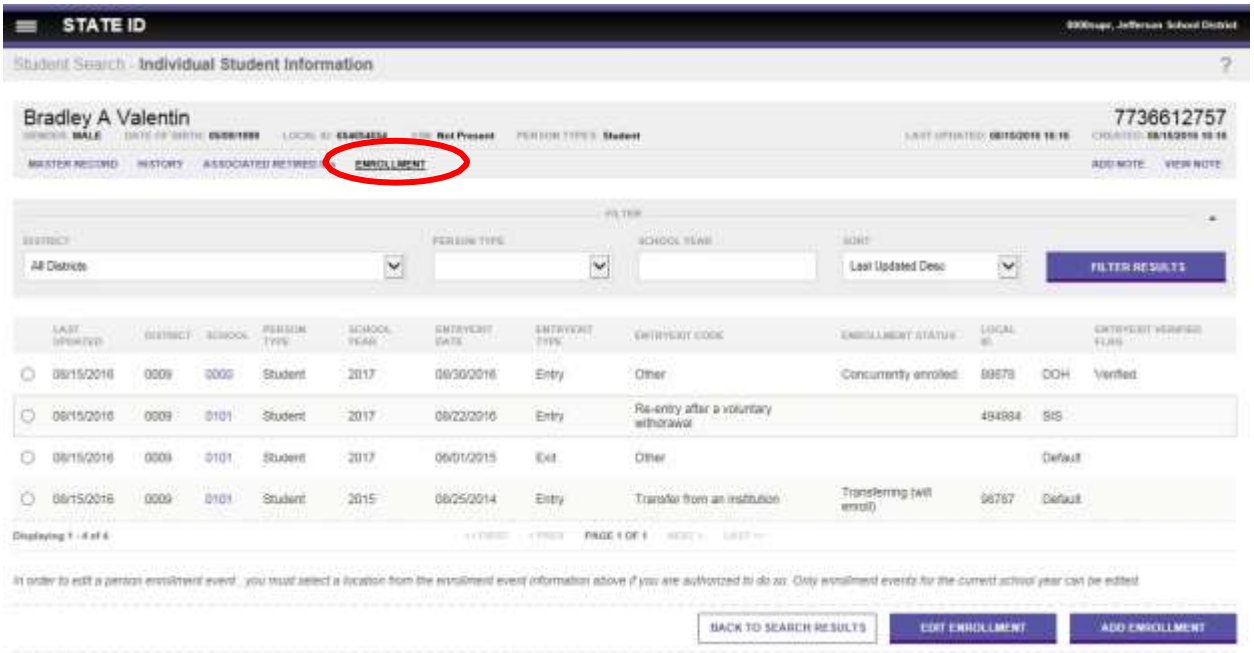
TIP: *Starting with eUID v10.0, History is display as its own tab. Click on the arrow to expand the History record.*

Screenshot from Associated Retired IDs tab:



Screenshot from Enrollment tab:



NOTE: *The Enrollment tab can be enable or disabled per user role by the System Administrator.*

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EDITING STUDENT

About Editing student

The student **Search** module also contains a feature that will allow users to edit student records without performing a formal submission for ID Assignment (e.g., uploading a student Batch File). The ability to edit a student is dependent on the following:

The user has the rights to edit student records. An administrator can give a user role the rights to edit student records with the **Security Manager** module.

AND

The student is in the user's location (district) and/or building (school). For District Users and above, the student has to be in the user's current district. For Multi School Users and below, the student has to be in the user's school. If the Allow Submissions by Residential District property is enabled, the button will display if the student's residential district is equal to the user's current district.

Steps

To edit a student, users should perform the following steps:

1. Perform a search as described above.
2. Click the

button on the Individual student Information page.

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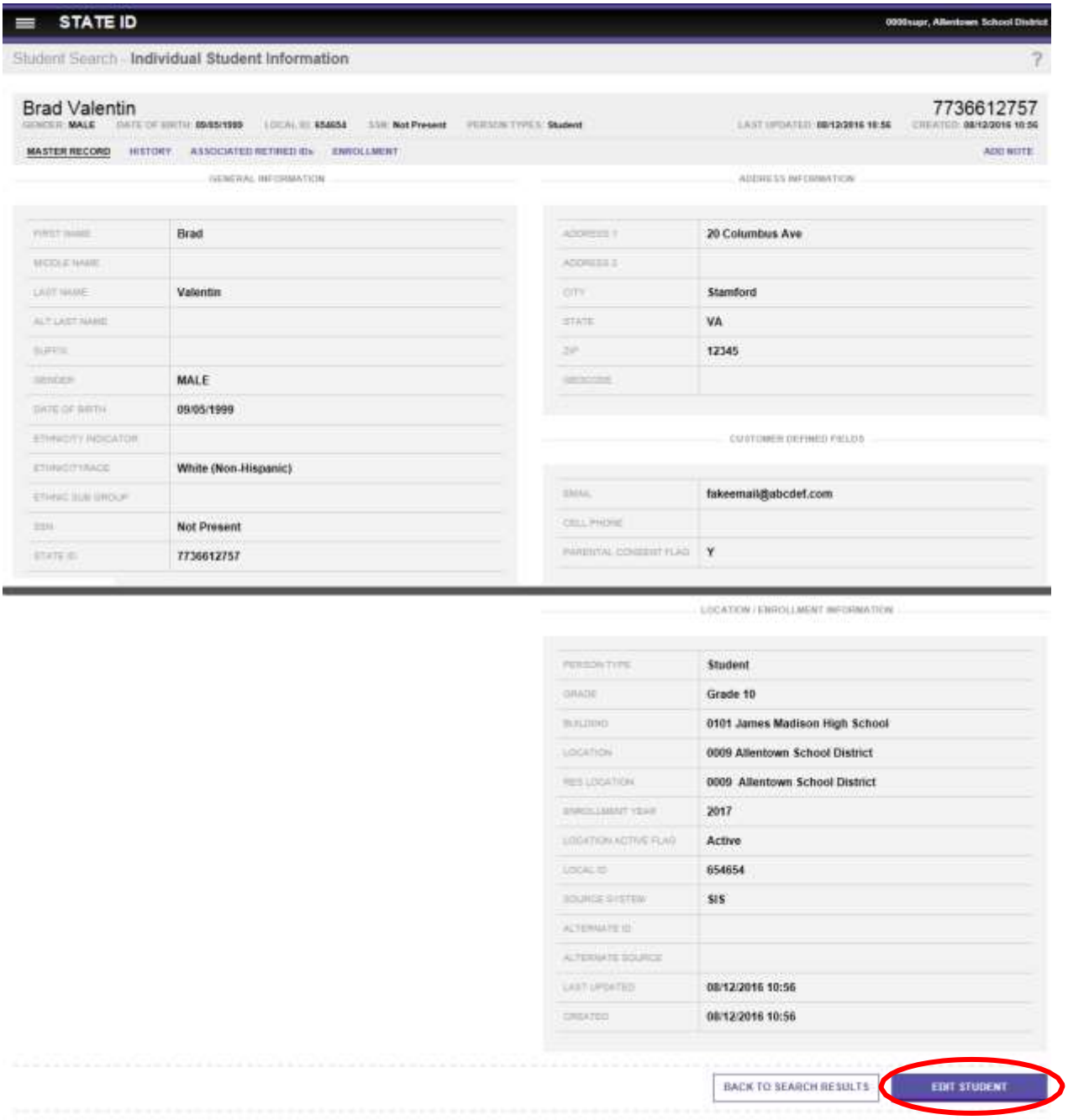

NOTE: *The* **EDIT PERSON** *button will always display on the above page but may not always be enabled. Please note the screenshot above has a page break to allow it to fit on this User Guide.*

3. Review the Edit student page. This page displays the student record and allows the user to make corrections/additions to the information.

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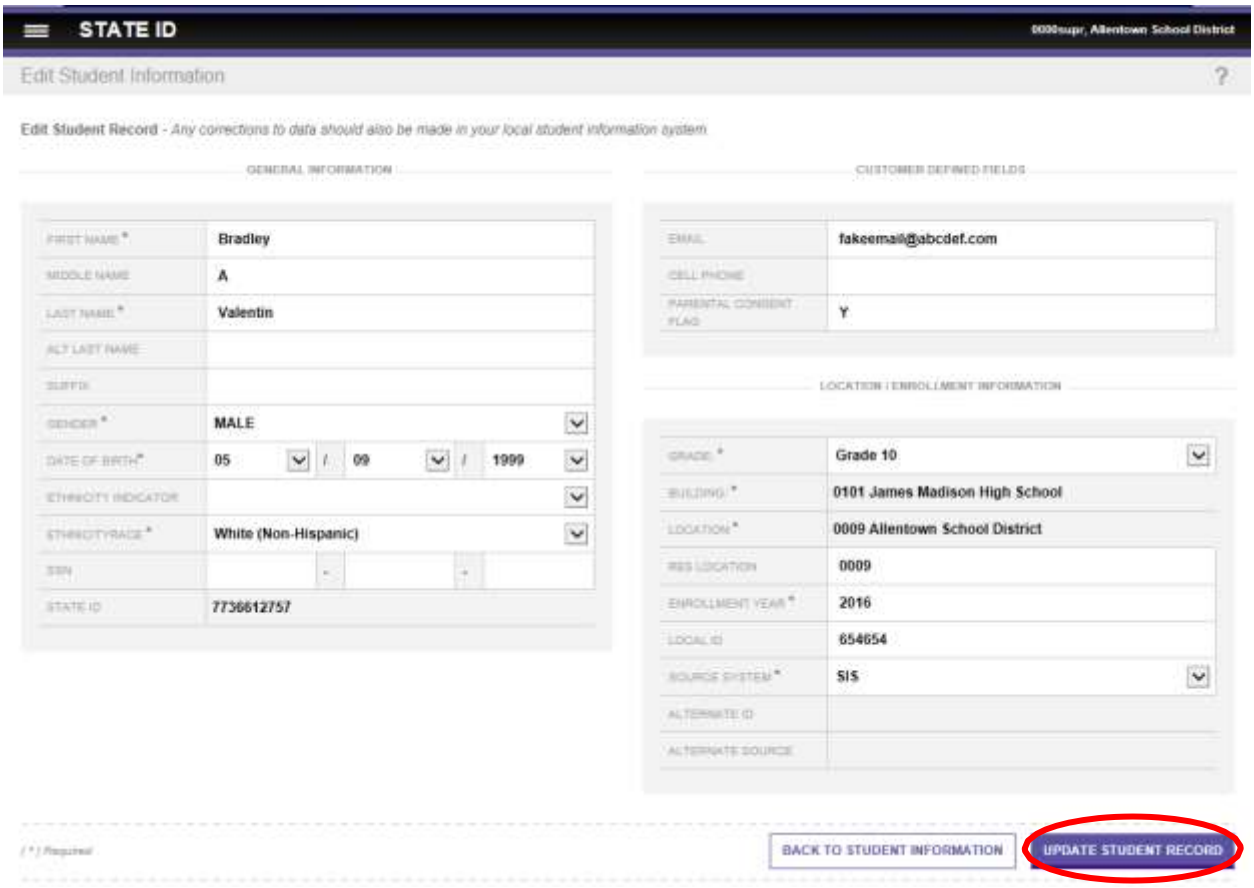

4. Update information as necessary. School Code and District Code are not editable, but all other fields can be updated.
5. To save the changes, click the **UPDATE PERSON RECORD** button.
   a. To cancel the changes, click the **BACK TO SEARCH RESULTS** button.

NOTE: *With some implementations, the* ***Social Security Number*** *field will be masked (as shown above) and the user will not be able to edit it. With other implementations, the* ***Social Security Number*** *field will display an actual value and the user will be able to edit it.*

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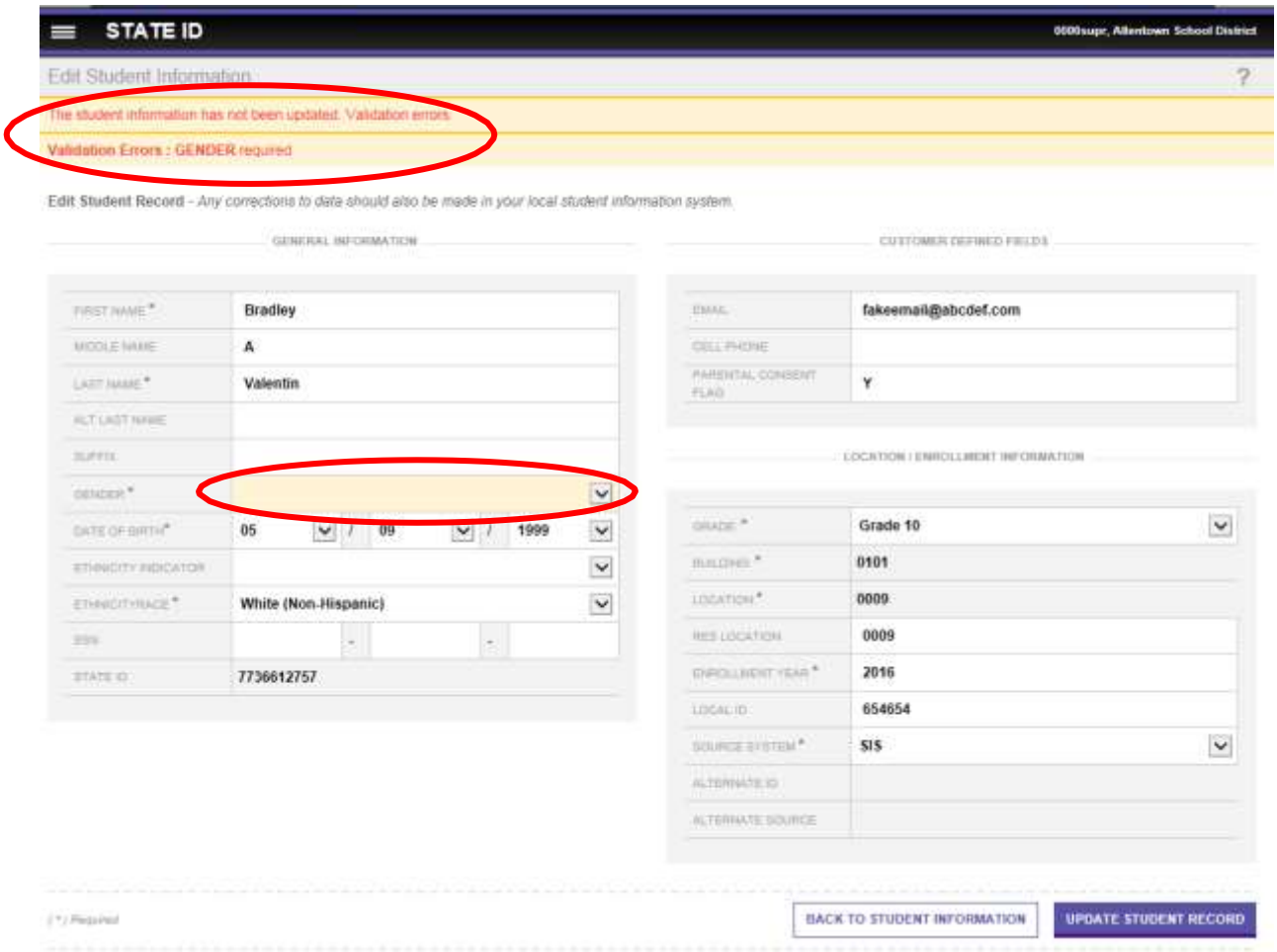
Similar to the way the application validates data in the **Enter Online** module, the application will validate any changes made to the student's information in the **Edit student** module. If a value entered by the user is an invalid, the application will display the following page:



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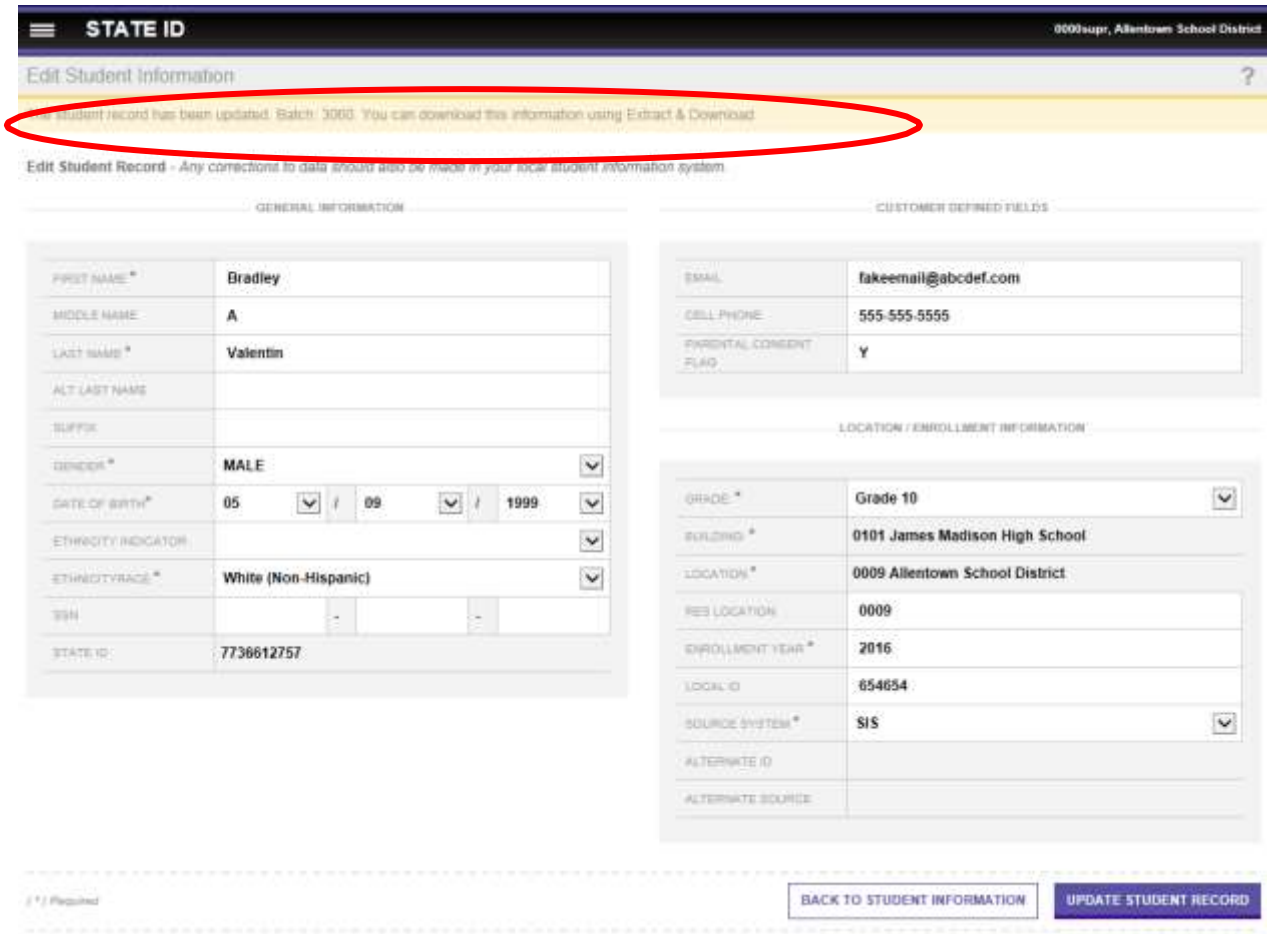
If the changes pass validation, the application will display a message stating that the record was updated, the batch number and information on extracting the data.



For every student edit, the application will generate a batch number for that change. Batches generated via this feature will always contain one record and the status for that one record will always be “Person Updated and History Created - Direct Edit.” In addition, users can download the record they updated in the **Download Batch** module.

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MULTIPLE LOCATION ASSIGNMENTS

Adding Multiple Locations

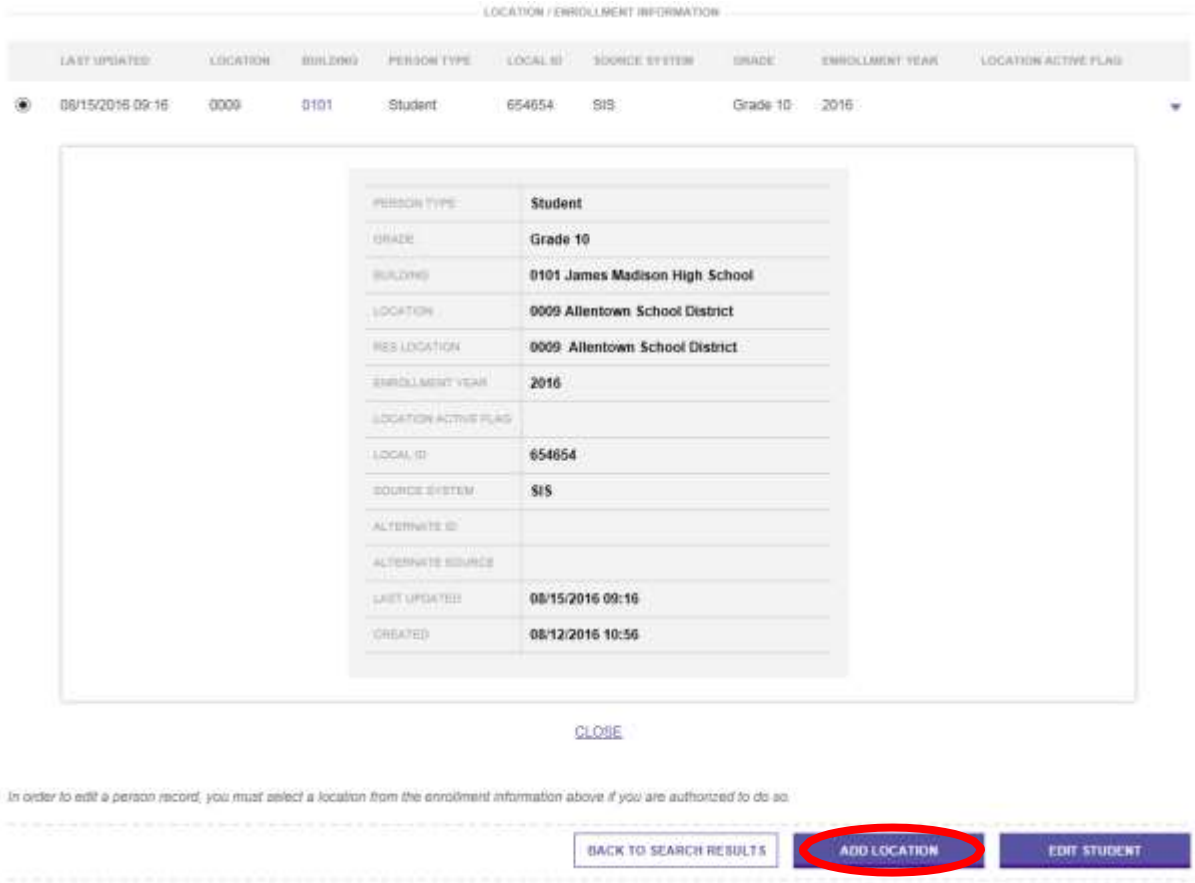
The purpose of this feature is to allow authorized users to add more than one location assignment to a master student record. Multiple Locations can be used to help clarify information about the student. The **Multiple Location Assignments** functionality will be available only if a system administrator has enabled the feature. If the feature is disabled, authorized users will not be able to add Multiple Locations and the application will behave the same way as in eUID v9.0 and below, where only one master location was allowed per student record.

NOTE: *Multiple Location Assignments is a system wide feature. Once enabled, the feature cannot be disabled.*

Steps

To add a new Location from the student **Search** component, a user should perform the following steps:

1. Click the student **Search** link on the *Menu.*
2. Search for a student as described above.
3. Click the hyperlinked **Last Name** or **First Name** to view the search details.



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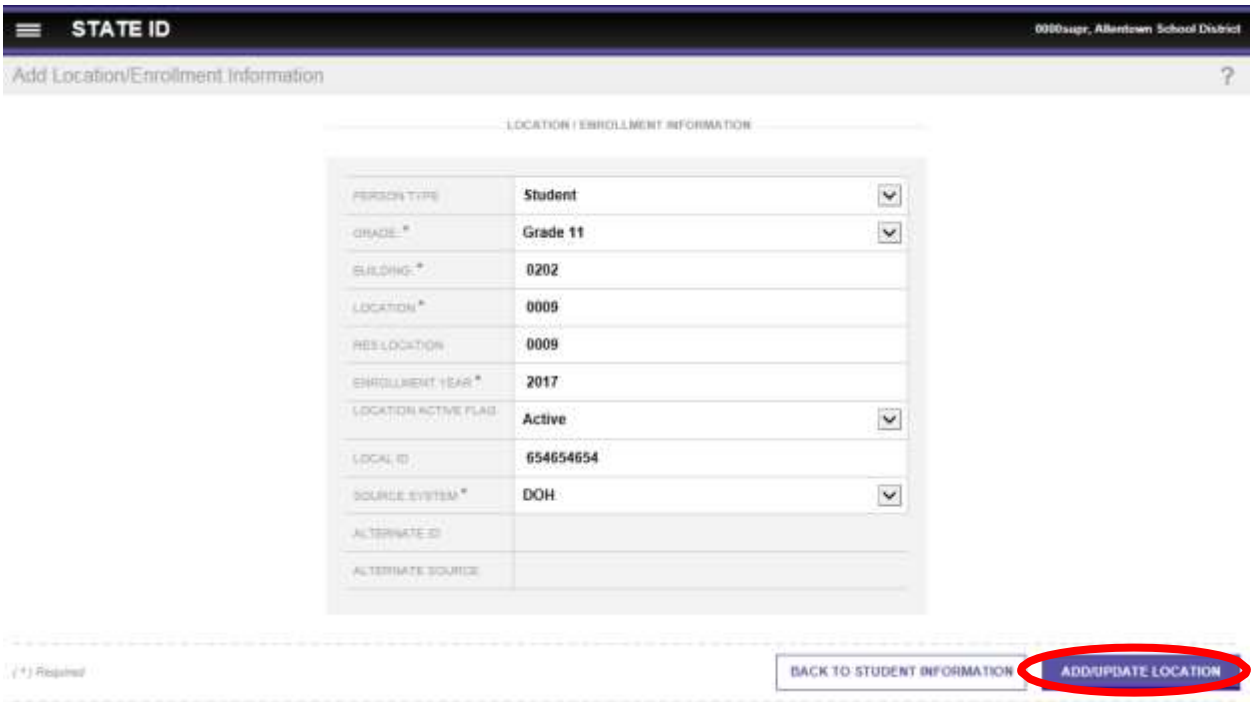
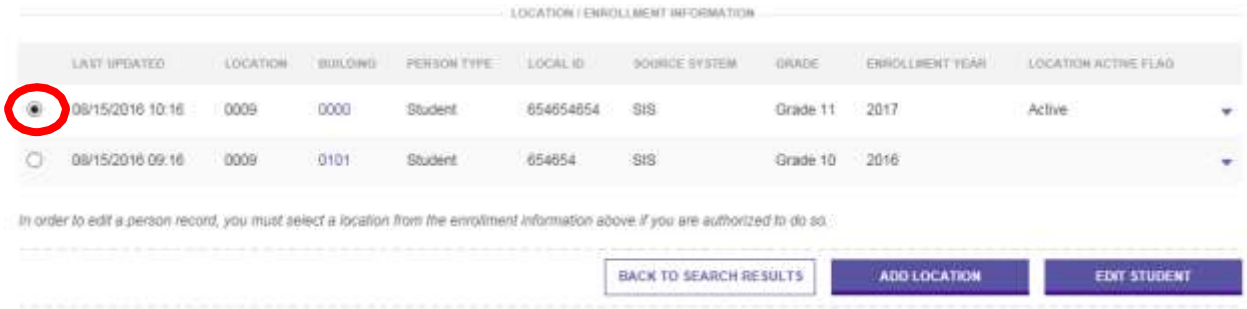
NOTE: *Multiple Location Assignments are displayed as a data grid as shown above when the feature is enabled. The data grid will expand if only one location is available for a student record. On the other hand, the data grid will collapse if multiple locations exist. The radio button will be preselected if a location matches the user's location, otherwise it will not be available for action.*

4. Click Add Location button on the student Information page.
5. Add the Location information and click on Add/Update Location.



6. If no errors exits, the new Location will be added.
7. Click on Back to Student Information to view the new location.



NOTE: *In order to edit a student record when Multiple Locations is enabled, the authorized user must select a location from the Location/Enrollment Information. All radio buttons will be disabled if none of the locations match the user's session.*

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ENROLLMENT EVENTS

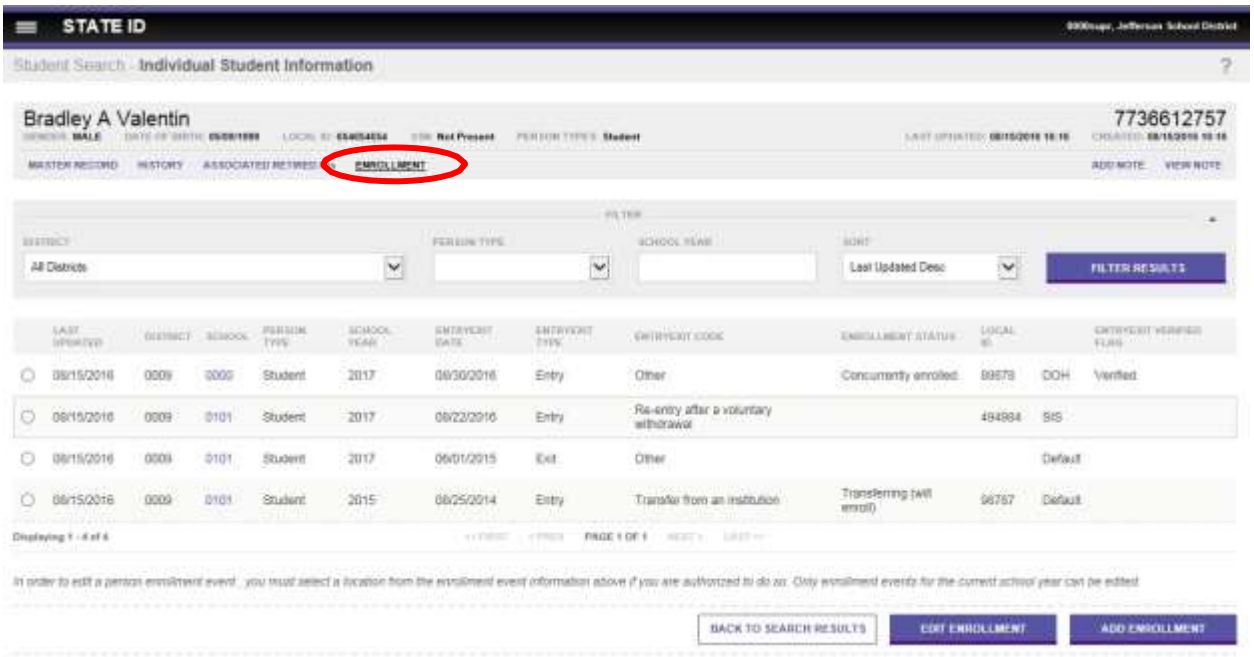
Viewing student Enrollment Events

The purpose of this feature is to allow authorized users to view and add Enrollment Events to an existing Master student Record.

Steps

To view an Enrollment from the student **Search** component, a user should perform the following steps:

1. Click the student **Search** link on the *Menu.*
2. Search for a student as described above.
3. Click the hyperlinked **Last Name** or **First Name** to view the search details.
4. Click on the Enrollment tab link.
5. The Enrollment tab will display all enrollment events that have ever been added/edited for a student record.



NOTE: *The Enrollment tab, then Add Enrollment button, and the Edit Enrollment button can be enable or disabled per user role by the System Administrator.*

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Adding student Enrollment Events

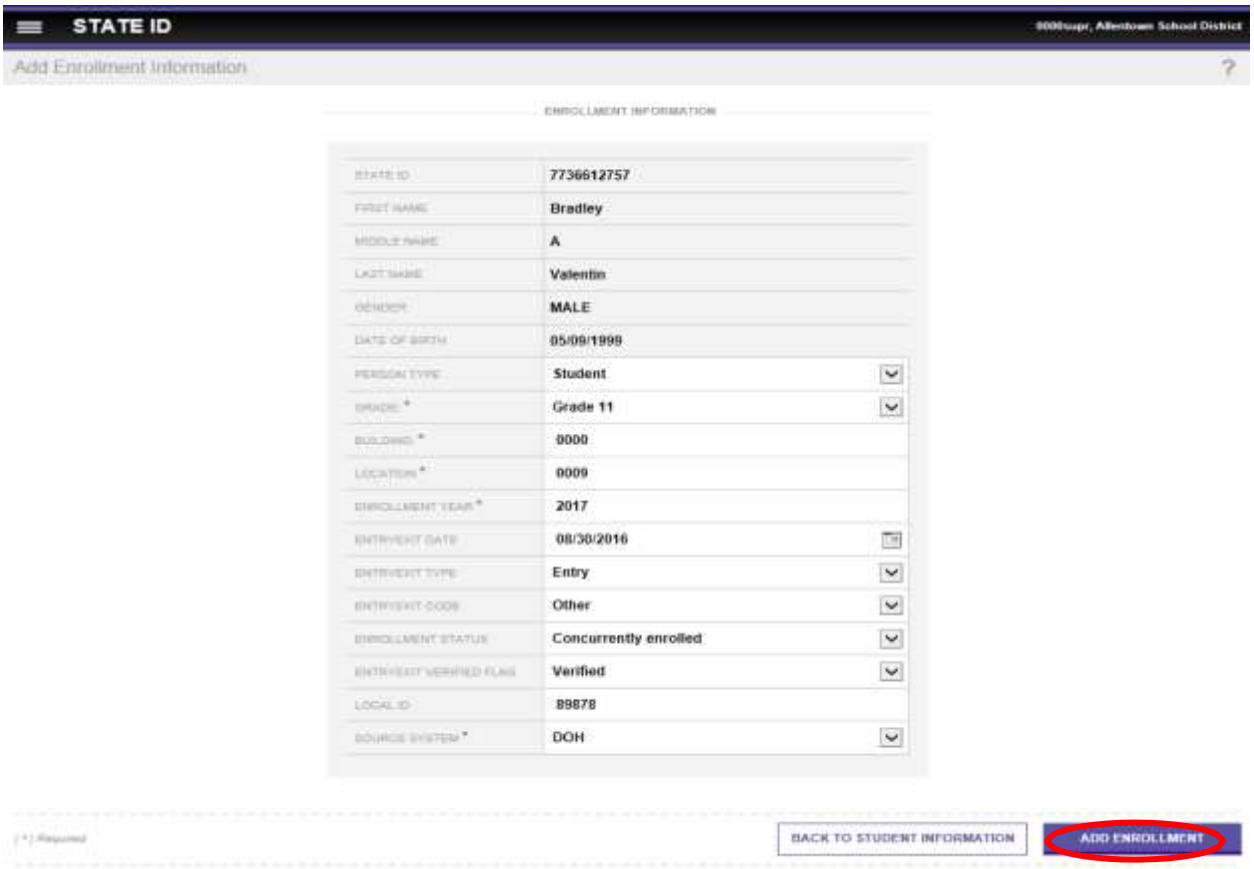
The purpose of this feature is to allow authorized users to add Enrollment Events to an existing Master student Record through the user interface.

NOTE: *Enrollment Events that are added through the User Interface will not update the Master student Record. On the other hand, Enrollment Events added through the Assignment Process will update the Master Record.*

Steps

To add an Enrollment Event from the student **Search** component, a user should perform the following steps:

1. Follow steps 1-4 above.
2. Click the Add Enrollment button. The Add Enrollment page will display.
3. Complete the required information and click on the Add Enrollment button.



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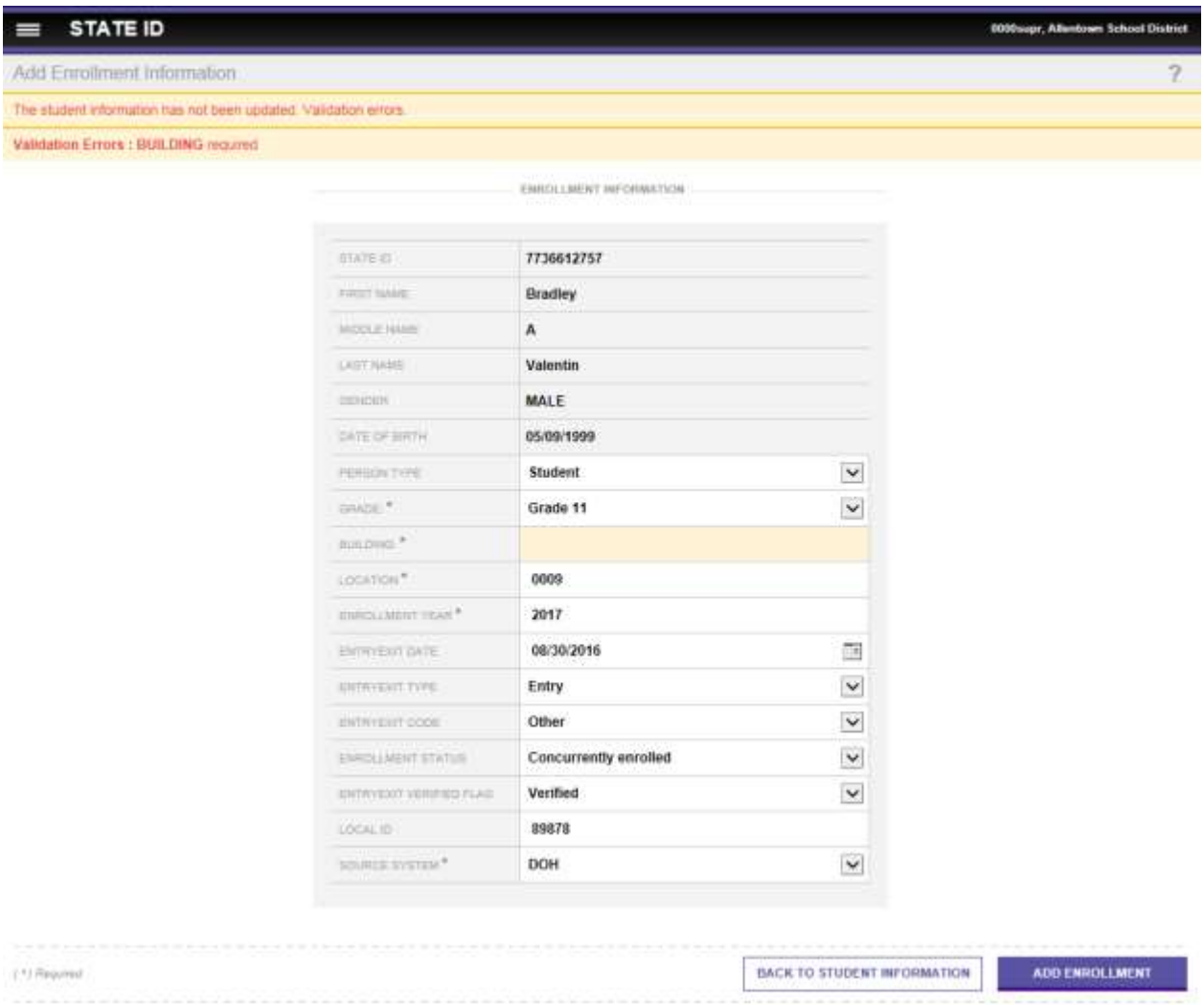
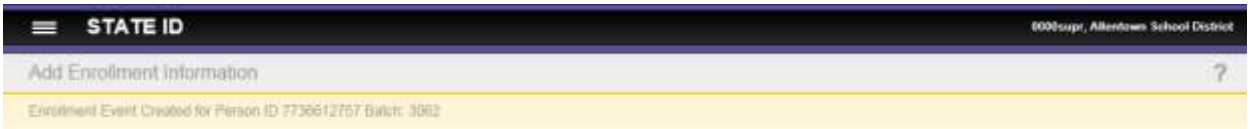
4. If validation errors exist, the page will display all errors at the top and highlight the same within the page.



5. If there are no validation errors, the Add Enrollment Information page will refresh and display the following message:



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Editing student Enrollment Events

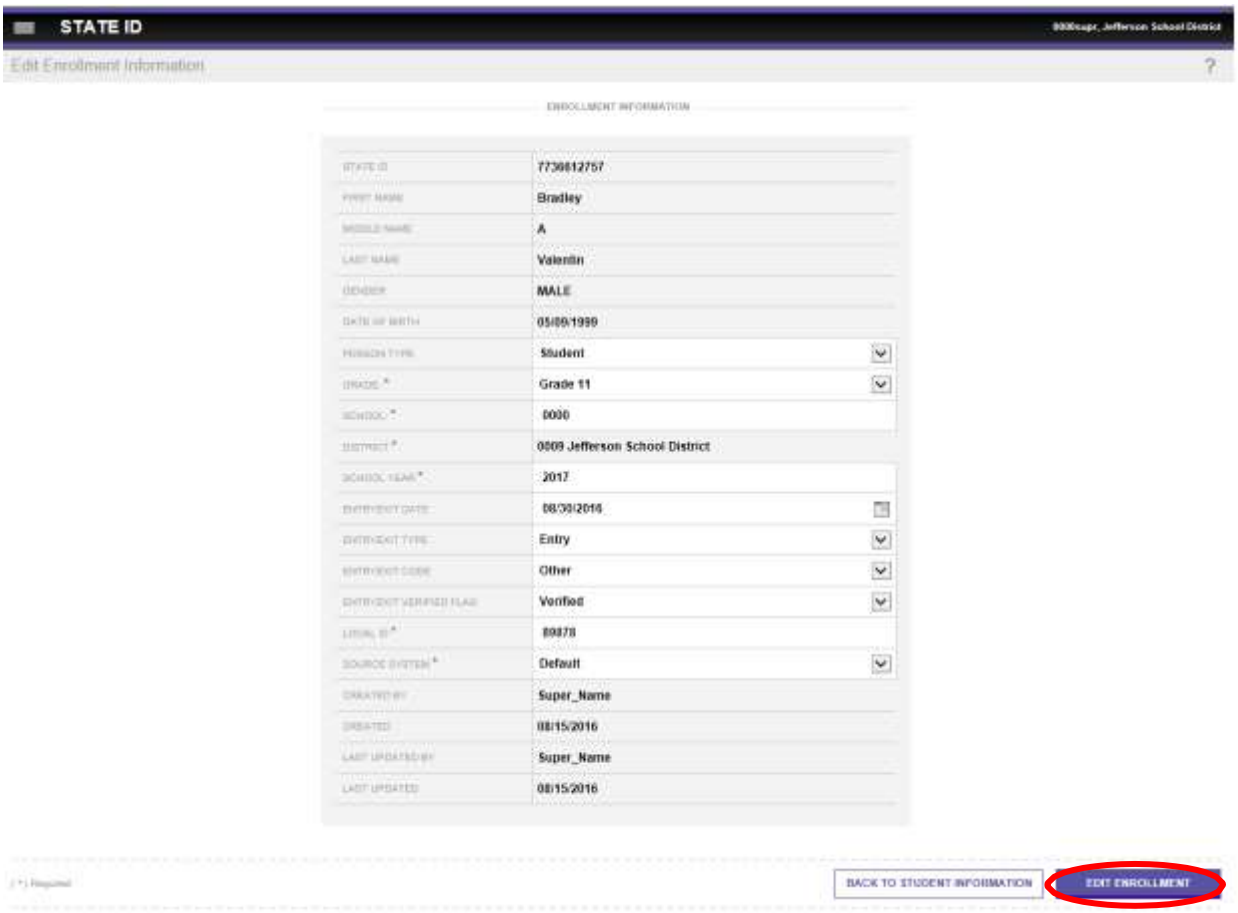
The purpose of this feature is to allow authorized users to edit Enrollment Events to an existing Master student Record through the user interface.

NOTE: *Users can only edit Enrollment Events that belong to their own Location. Additionally, only current school year Enrollment Events can be edited when the School Year validation is enabled.*

Steps

To edit an Enrollment Event from the student **Search** component, a user should perform the following steps:

1. Follow steps 1-4 above.
2. Click the Edit Enrollment button. The Edit Enrollment page will display.
3. Update the information and click on the Edit Enrollment button.



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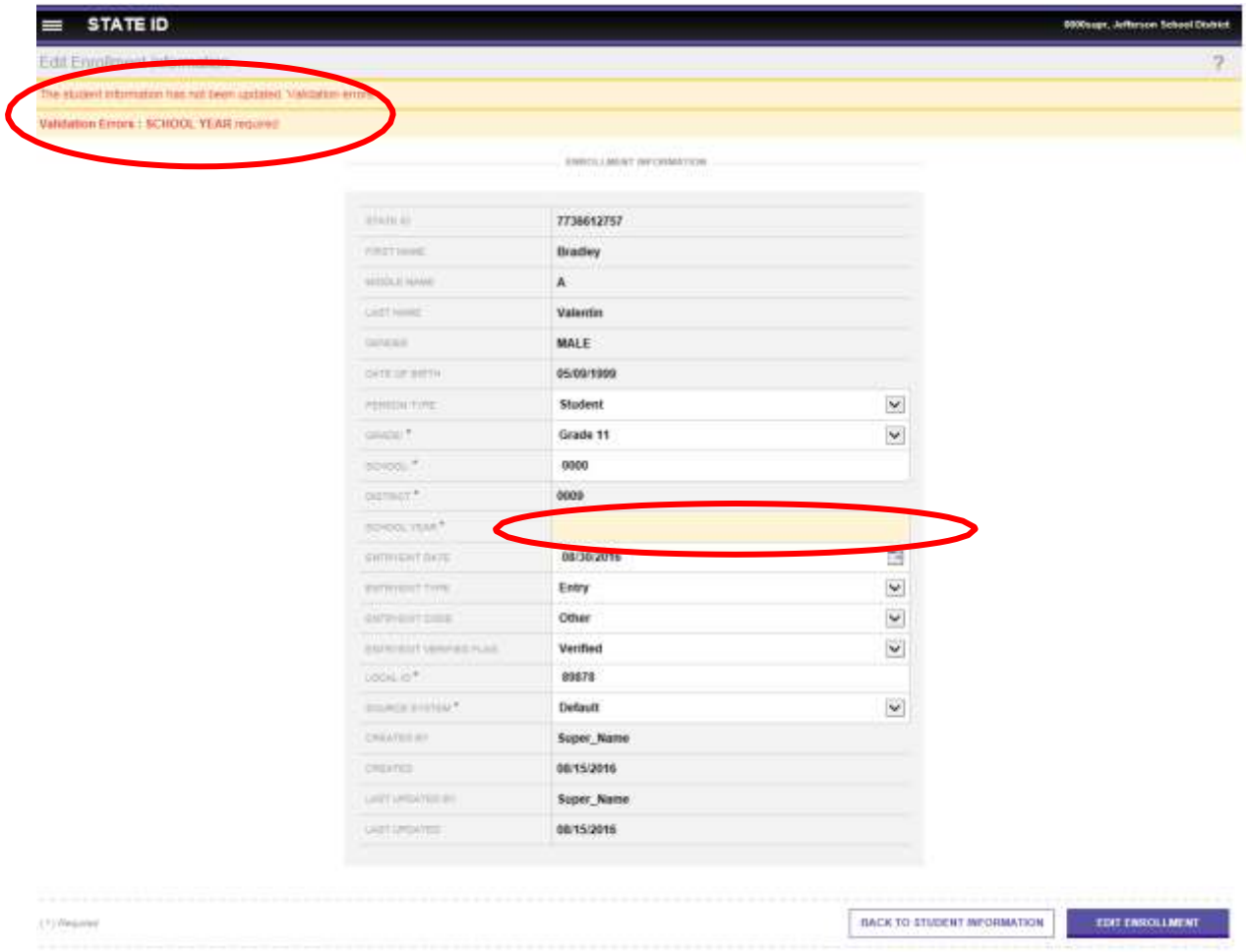
4. If validation errors exist, the page will display all errors at the top and highlight the same within the page.



5. If there are no validation errors, the Edit Enrollment Information page will refresh and display the following message:

6. Users can delete an enrollment event by repeating 1-3 above and selecting the “Delete” option from the dropdown menu for the Entry/Exit Verified Flag field. Deleted events will remain in the student record but will appear with a strikethrough.

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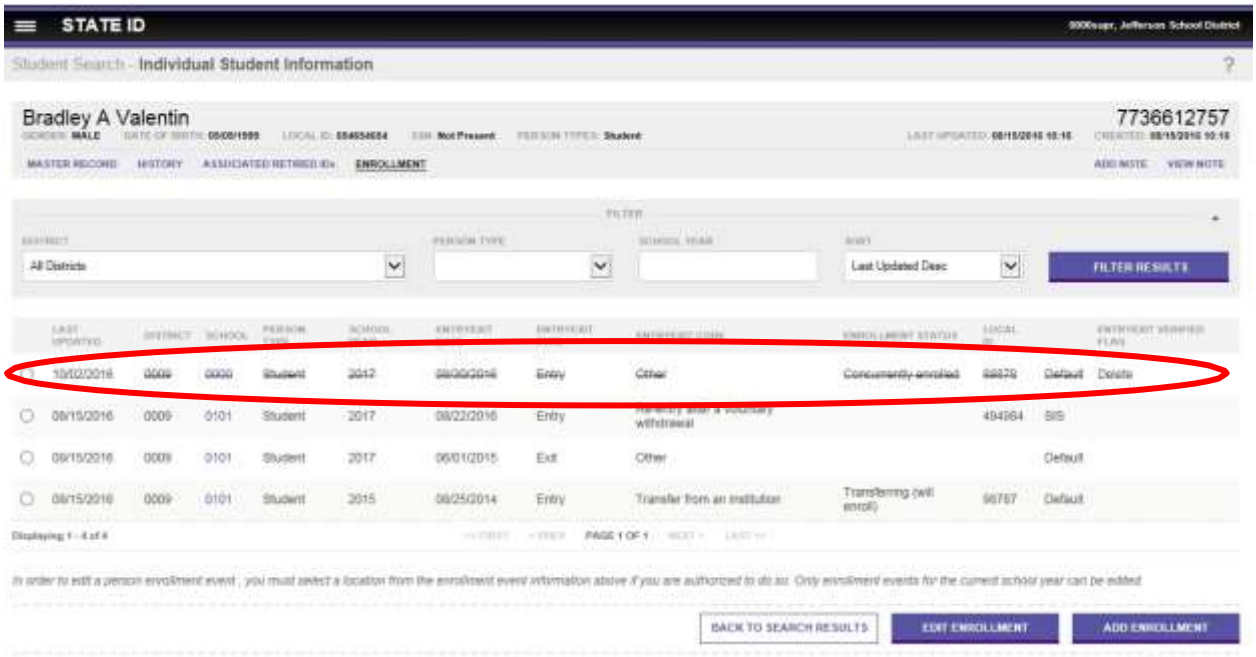

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PERSON NOTES

Adding student Notes

The purpose of this feature is to allow authorized users to input notes and comments into a student record. The notes can be used to help clarify information about the student. The student **Notes** functionality will be available in the following areas of the application when enabled:

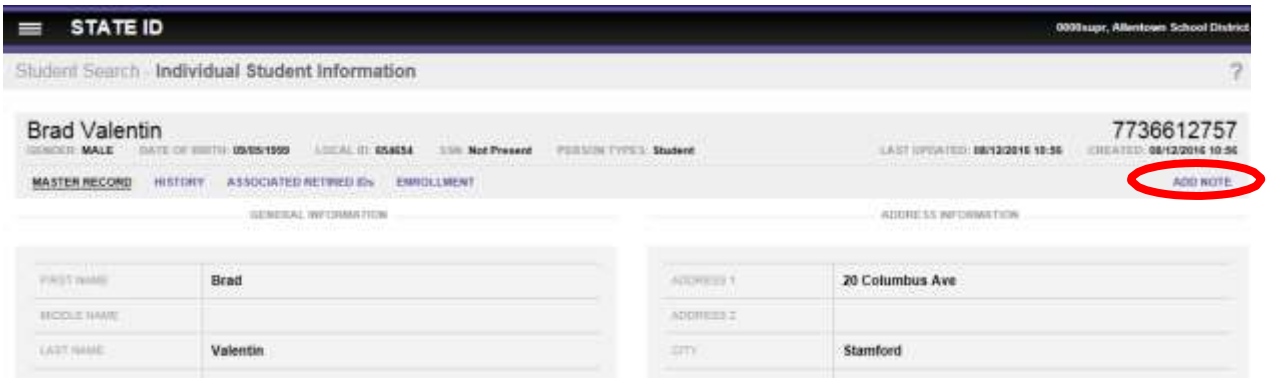
- Search Individual student Detail Results
- Near Match Review
- Claims Details
  - Create New Claim
  - Delete Claim
  - Respond to Claim

NOTE: *The student Notes are viewable by users with authorization. student Notes can only be added and viewed. They cannot be updated or deleted.*

Steps

To add student Notes from the student **Search** component, a user should perform the following steps:

7. Click the student **Search** link on the *Menu.*
8. Search for a student as described above.
9. Click the hyperlinked **Last Name** or **First Name** to view the search details. Upon clicking the hyperlinks, the student **Search** information page will be displayed.



10. Click the "**ADD NOTE**" link.
11. The **Add student Note** page will be displayed. This page will allow users to enter up to 255 characters of text.

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12. Enter Note Text.
13. Click the SAVE button.
14. A confirmation page will be displayed allowing the user to view the note that was added.
15. Click the BACK button to return to the student Information page.

student notes can be added throughout the application where the "Add Note" link exists.

Viewing student Notes

Once a student note has been added to the application, it is viewable to authorized users. The authorization to add and view notes is determined by the system administrator. To view a note, users should perform the following steps.

Steps

1. Search for a student as described above.
2. Click the hyperlinked Last Name or First Name to view the search details. Upon clicking the hyperlinks, the student **Search** information page will be displayed.
3. If notes have been added, a "**VIEW NOTE**" link will be displayed at the top of the student Information page.

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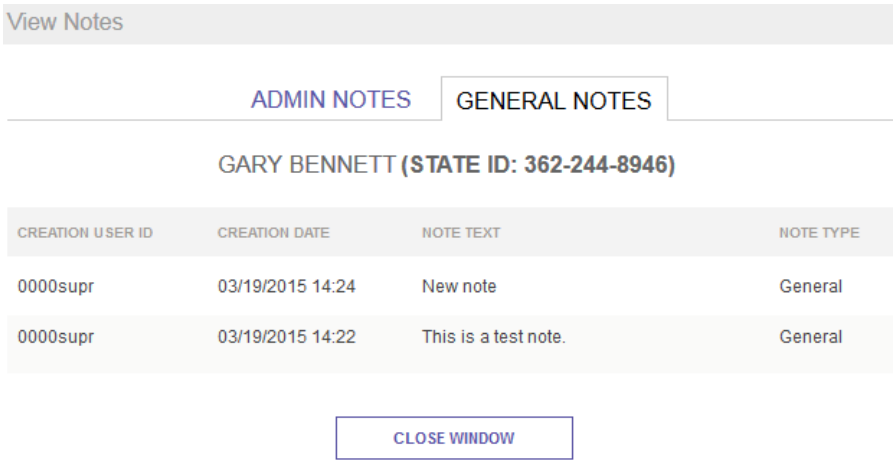
4. Click the "**VIEW NOTE**" link to view the notes.
5. A new window will open displaying the available notes for the student. The application provides information on the user ID, creation date, the text of the note and the note type.



NOTE: *The application contains Administrator and General Notes. Administrator notes are visible only to Administrators while General notes are viewable by anyone with authorization to view general notes.*

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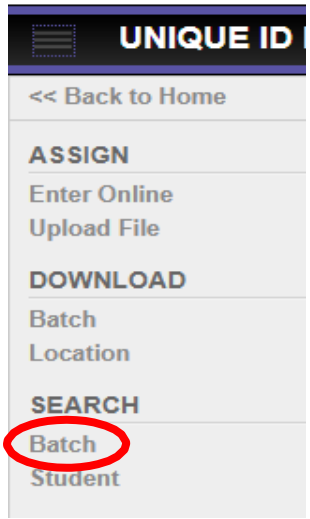
SEARCH > BY BATCH

About Batch Search



Users can search for student records with a batch file by clicking the **Batch** link under **SEARCH** from the *Main Menu*:

This feature allows users to:

- Search for student records with a batch file and download results of the search.
- View previous batch search results.
- Extract & Download a batch.

Some implementations may disable this feature for certain or all users. In such an instance, the link will not appear on the Menu.

NOTE: *In this module, the application will search against the current information for student records that have been assigned an ID. Although a Batch Search performs a similar search to the ID Assignment search, it is not exactly the same and may produce different results.*

The **Batch Search** feature requires that a eUID student file is uploaded into the application. The format/structure of the search file is exactly the same as **the student Batch File** format, but not all fields are required. Batch Search includes Basic search and an Advanced search capability, along with the ability to download the results.

Steps

To search for student records using a batch files, users should perform the following steps:

1. Click the **Batch Search** link on the *Menu*.
2. Click the UPLOAD BATCH FILE button.

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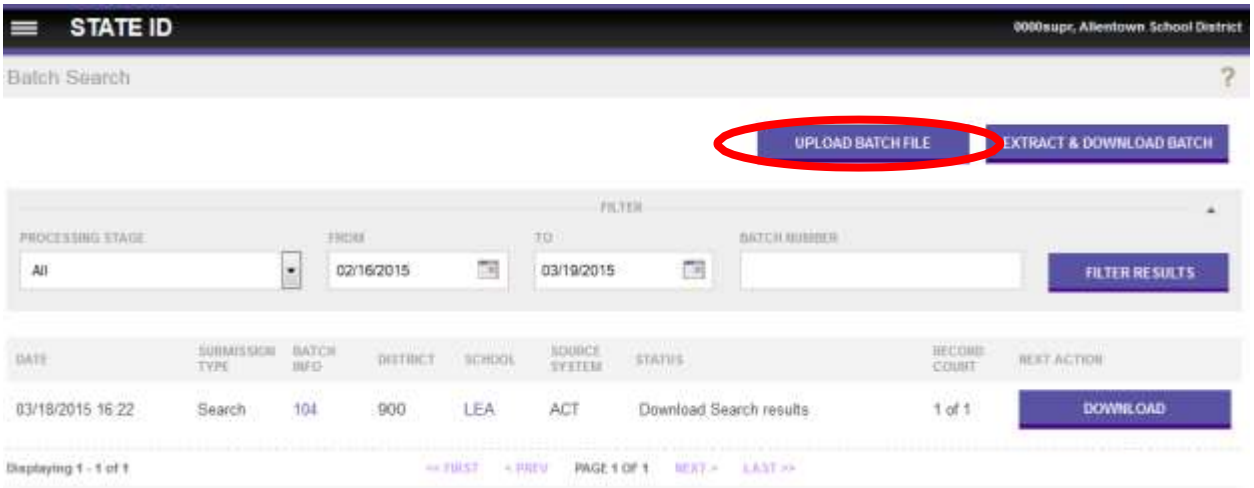
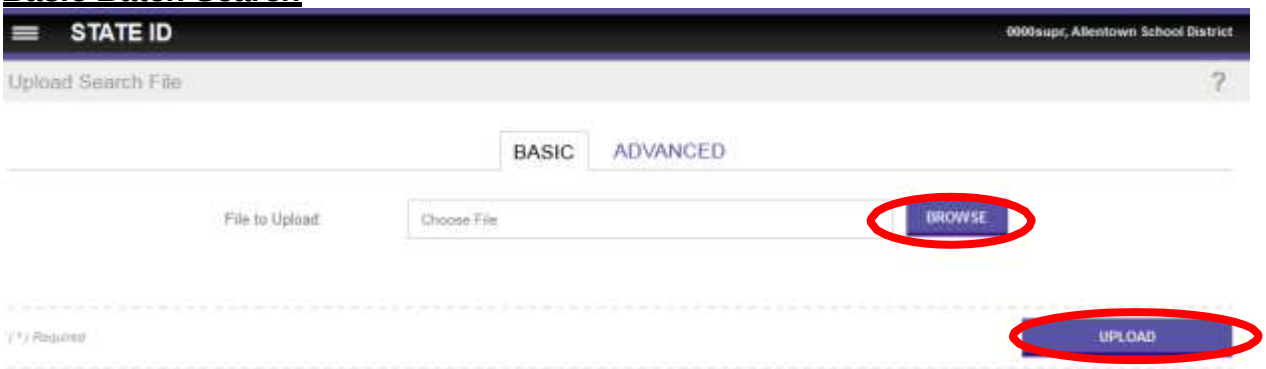
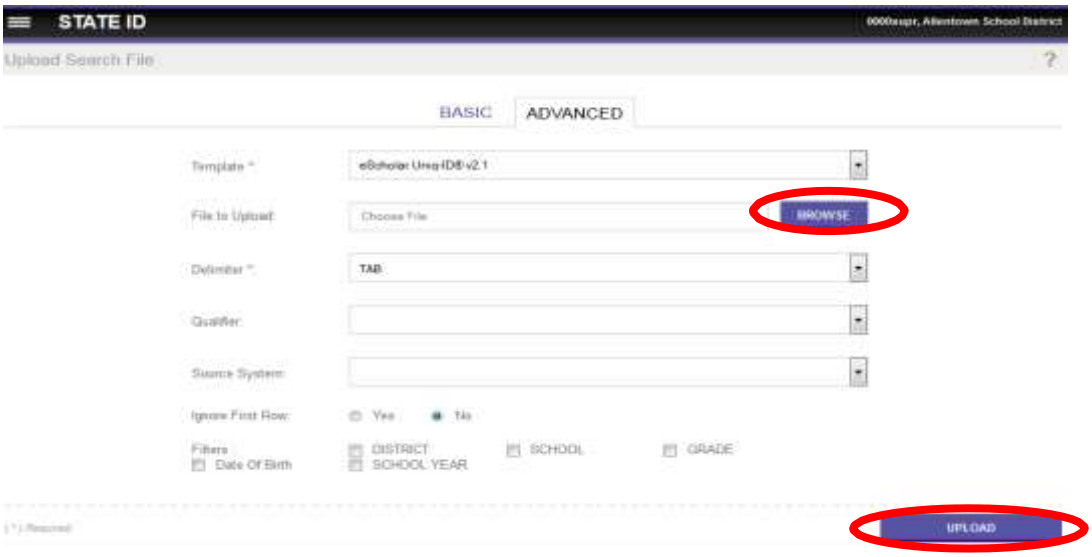


3. Click on the *Basic and Advanced* tab based on the search to be performed.

Basic Batch Search



Advanced Batch Search



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4. Browse for the file and complete the upload form as necessary.
    a. For Advanced Batch Search, you must select the Delimiter, Qualifier, and Source System in the file, the Ignore First Row option, and the Filters.
    b. The Filters capability removes matches from the results where the selected field does not match the potential match. This new capability allows users to select one or many filters to apply to the Batch Search and if the submission record does not match the value(s) for those fields to the master record, the record will not be returned as a match. The application applies this filters with an "or" condition, so if multiple filters are selected and only one of the values is different between the master and the submission record, it will be a no match. For example, if the District and School filters are applied to a Batch Search, which includes Jonathan Lee in district 0009 and school 888, and the application finds a Jonathan Lee record in district 0003 and school 888 as a match, the 0003 record will be filtered out of the results and will not be returned as a match.
5. Click the UPLOAD button.
    a. The application will analyze the file, similar to the process described in the **File Upload** section above and display any file errors.
    b. If a file error is found during the processing, the user should click the UPLOAD NEW FILE button to submit a new file.

> ***NOTE:*** *If the application is interrupted (e.g., connectivity is lost to the database) while it is doing search validation, the batch returns a message. The process can be restarted by clicking the* ***CONTINUE VALIDATION*** *button in the* ***Next Action*** *column. This may be the case even if all the records, according to their status, appear to have finished validation. In such an instance, the* ***Continue Validation*** *button should be clicked.*

> ***TIP:*** *Batch searching has only two required fields: student* ***Last Name*** *and student* ***First Name****. However, if more information is provided, there is a better chance of the application finding a matching student. In addition, if a value for an optional field is provided, the application validates the format of that value. If the application determines that the format is not correct it auto-cancels the record.*

6. The application will return to the **Batch Search** page once the file validation has been performed. The *Batch Info* link will be listed on the page along with the Status, Number of Records, and a Next Action button.

> ***NOTE:*** *This list is ordered from most recent to oldest batch.*

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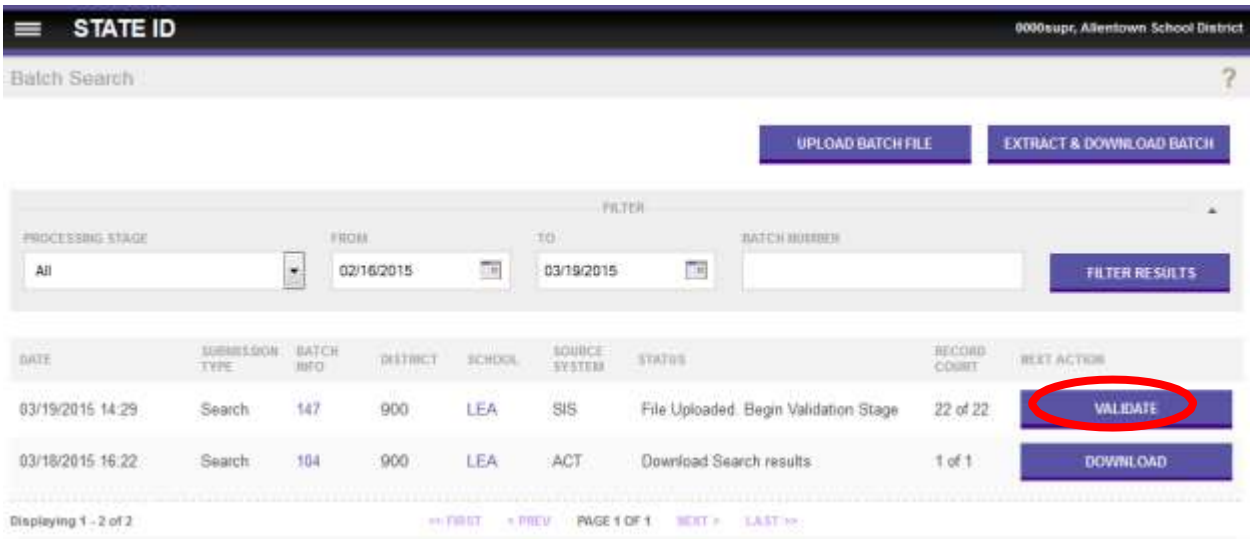
7. Click the VALIDATE button to validate the data included in the batch search submission.

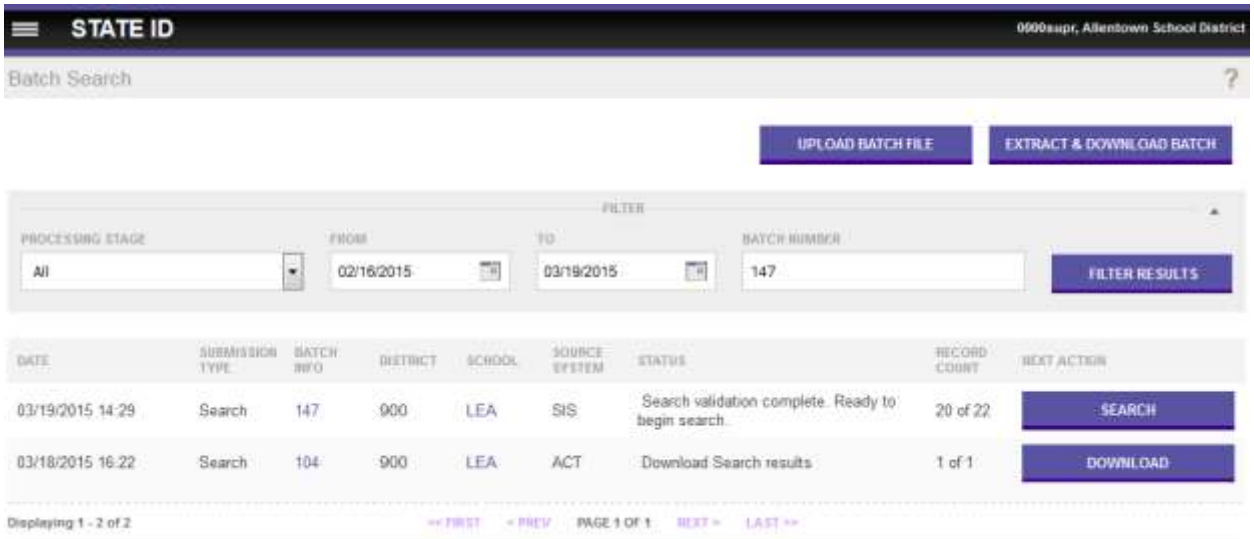


   a. If any data errors are found during validation, the records containing the data errors are auto-canceled. Those records will not be included in the rest of the search process.

   b. The records in the batch will also auto-cancel if they include the ID.

8. The application will return to the Batch Search page displaying the status of the process.

9. Click the SEARCH button to perform the search. If the SEARCH button is not visible, click the FILTER RESULTS button to refresh the page.



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10. The application will return to the Batch Search page displaying the status of the process, along with the *Batch Info* link. The application will find one of the following for each record in a batch:

    a. No matching students - The **State ID** column will be blank for these types of records in the downloaded file.

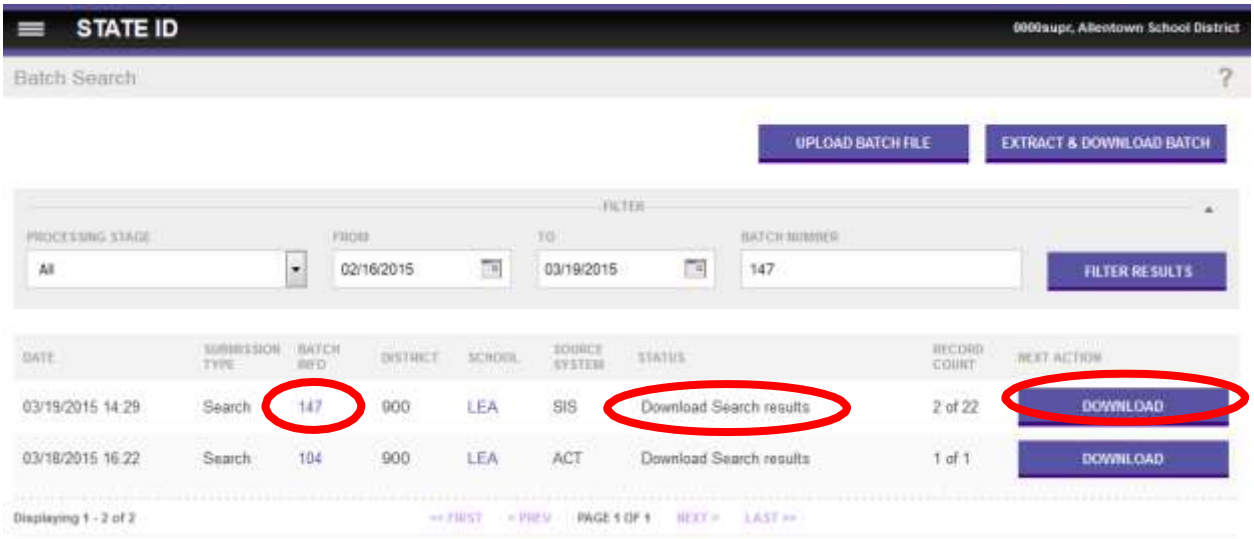
    b. A single matching student - The **State ID** column will contain the State ID of the matching student for these types of records in the downloaded file.

    c. Multiple matching student records – The record will be auto-canceled and will not be listed in the downloaded file.

    d. One or more near matching student records – The record will be auto- canceled and will not be listed in the downloaded file.

NOTE: *During a search, the eUID application will auto-cancel any record having multiple matching student records or at least one near matching student. However, all records auto-canceled during a batch search are available for download. This file will include a listing of all of the potential match State IDs in the comments column. Please see* ***Extracting & Downloading Batch Search Files*** *at the end of this section for further instructions.*

11. Click the DOWNLOAD button to generate the file for download. If the DOWNLOAD button is not visible, click the FILTER RESULTS button to refresh the page.



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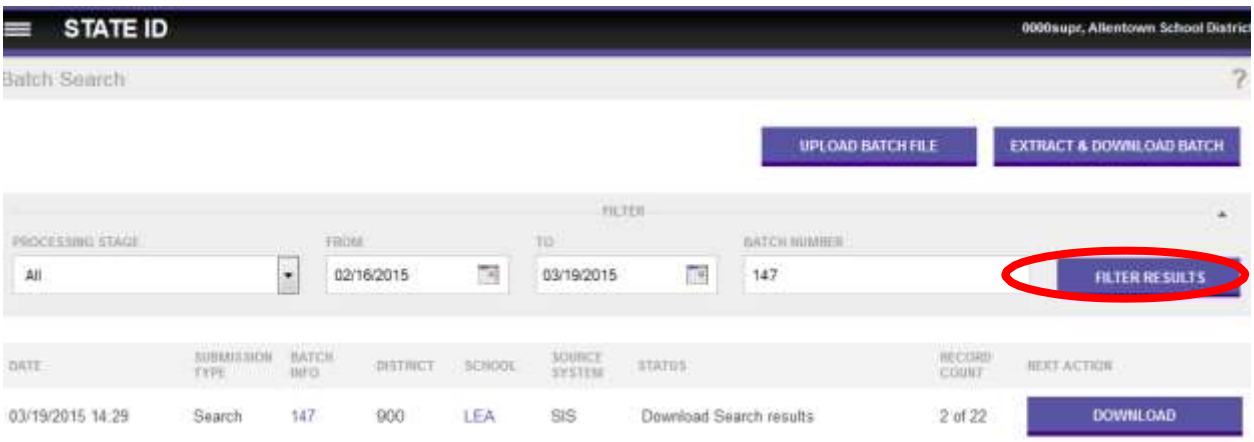
12. Download the search results file by clicking the DOWNLOAD button in the *Next Action* column. Doing so will open a File Download dialogue box that enables the user to either open the file or save it to the local computer.

13. The format of the downloaded file will be exactly the same as the student Batch File and each student record will include the State ID that was assigned to that student.

Viewing Previous Batch Searches

All batch searches submitted by the user will be visible on the **Batch Search** home page. The page can be filtered by a specific date range or processing stage to narrow down the results list. To filter the results, users should select the appropriate date range and/or processing stage. Once the selections are made, the FILTER RESULTS button should be clicked.



If more than ten batch searches have been submitted, navigation buttons will be available to access the additional pages.

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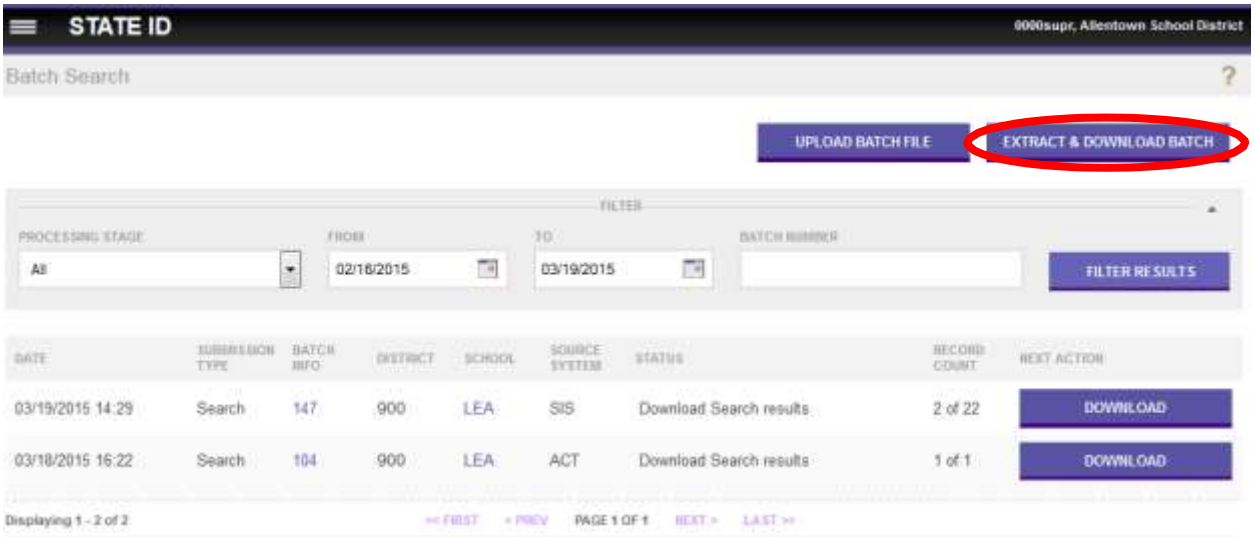
Extracting & Downloading Batch Search Files

The **Extract & Download** component can be accessed from within the **Batch Search** component. The **Extract & Download** component is detailed further in the Extract & Download on page 96.

To perform an extract and download within the **Batch Search** component, users should click the EXTRACT & DOWNLOAD BATCH button on the **Batch Search** page.



By accessing the **Extract & Download** component through the **Batch Search** component, the filters specific to the Batch Search will be available. These are:

- *Submission Type*: The only option for this page will be Search.
- *Extract Type*: The options are IDs Found – Search, IDs Canceled – Search, Near Match Details - Search, or Rejected
- *Sort*: Users can sort by Upload Date or Batch Number
- *Batch Search Date:* Users can enter a specific date range to filter the results.

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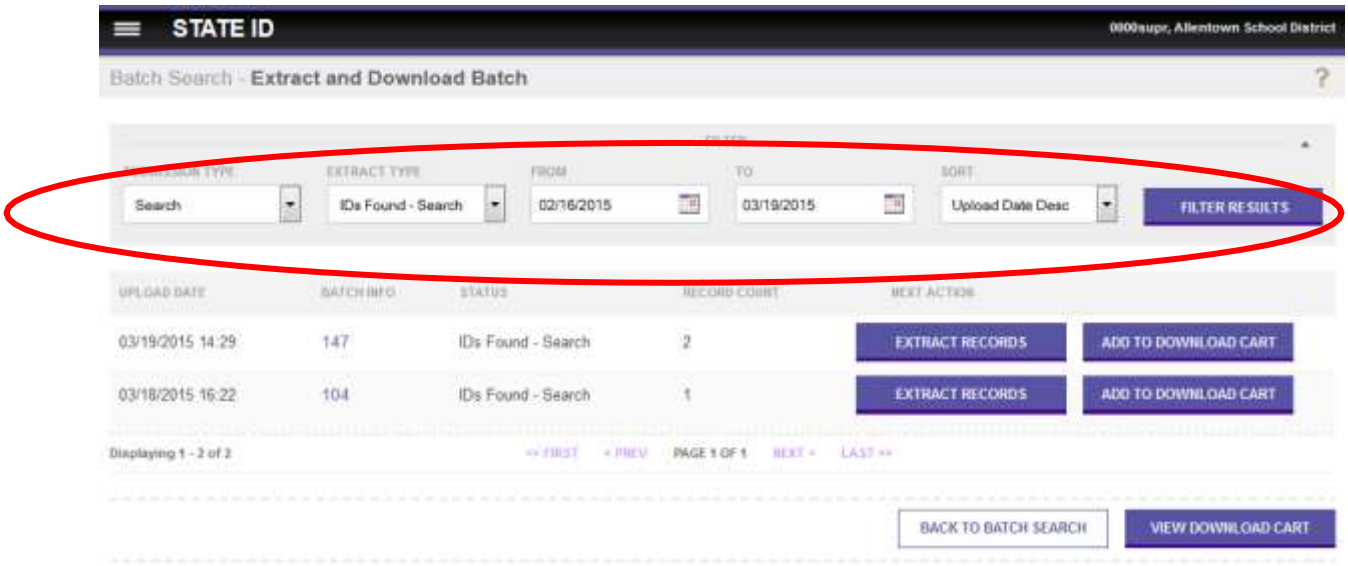

NOTE: *The Near Match Details extract allows users to download the submission record and potential matches for review in offline mode.*

Once the appropriate filters are set, users must click the FILTER RESULTS button to apply the filter. The page will display the *Batch Info* link, Status, Record Count, EXTRACT RECORDS button and a ADD TO DOWNLOAD CART button.

Users can download a file for a single batch by clicking EXTRACT RECORDS or combine multiple files together by using the Download Cart feature. When the Extract Records button is clicked, the application will display the file download page allowing the user to download the file.

For more information on using the Download Cart please refer to Download Batch on page 92.

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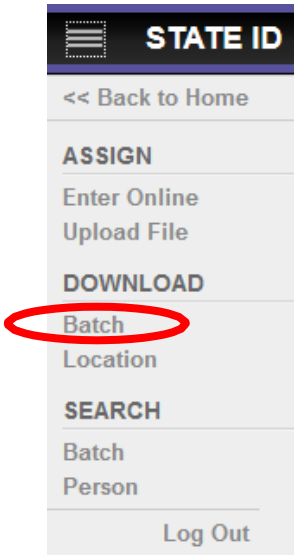
DOWNLOAD > BATCH

About Download Batch



Users can search for student records with a batch file by clicking the **Batch** link under **DOWNLOAD** from the *Main Menu*. Prior to v9.0, this feature was called "Extract & Download Batch".

This module allows users to:

- Filter the list of downloads available.
- Download a single file previously uploaded / processed in the application.
- Download multiple files previously uploaded / processed in the application.
- Download files with options.
- Remove batches from the Download Cart.
- View the Download Cart.

Some implementations may disable this feature for certain or all users. In such an instance, the link will not appear on the Menu.

All downloads in this module pertain to the ID Assignment Process. Below is a list of the seven types of downloads available, each are by batch:

1. IDs Assigned – includes all of the submission records with the assigned state identifiers for the batch.
2. Errors to Fix – includes all of the submission records in the error state along with an error message for the batch.
3. Near Matches – includes all of the submission records in the near match stage for the batch.
4. Canceled - includes all of the submission records which were canceled for the batch.
5. Rejected – includes all of the submission records which were rejected for the batch.
6. Fixed Records – includes all of the submission records in the batch that were fixed during the data validation stage.
7. Near Match Details – includes all of the submission records in the near match stage along with any matched records in the batch.

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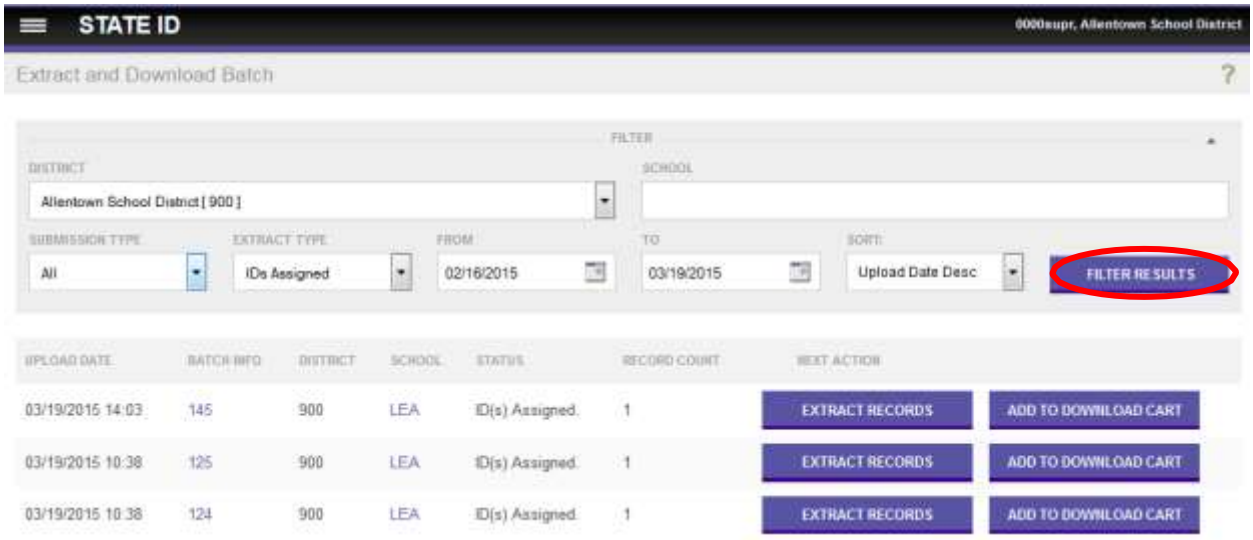
Steps

To filter results displayed on the **Extract & Download** page, users should perform the following:

1. Click the **Download > Batch** link on the *Menu*.
2. Select the appropriate filters. The following filters are available:
   a. *Submission Type*: The options are All, File, Online, SLF, Edit, Web Service, or Automation.
   b. *Extract Type*: The options are IDs Assigned, Errors to Fix, Near Matches, Canceled, Rejected, or Fixed Records.
   c. *Sort*: Users can sort by Upload Date or Batch Number
   d. Batch Upload Date
3. Click the FILTER RESULTS button.



4. Once the filters are applied, proceed to the **Downloading a File** instructions below.
5. Users can also get details about the submission the download is for by clicking the link in the *Batch Info* colum

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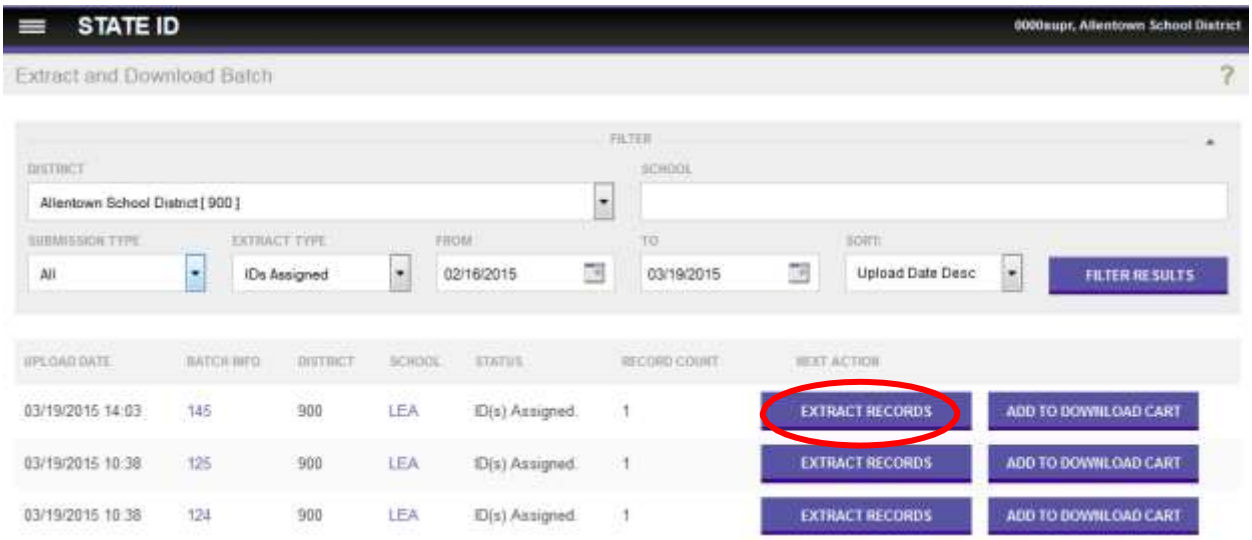
Downloading a File

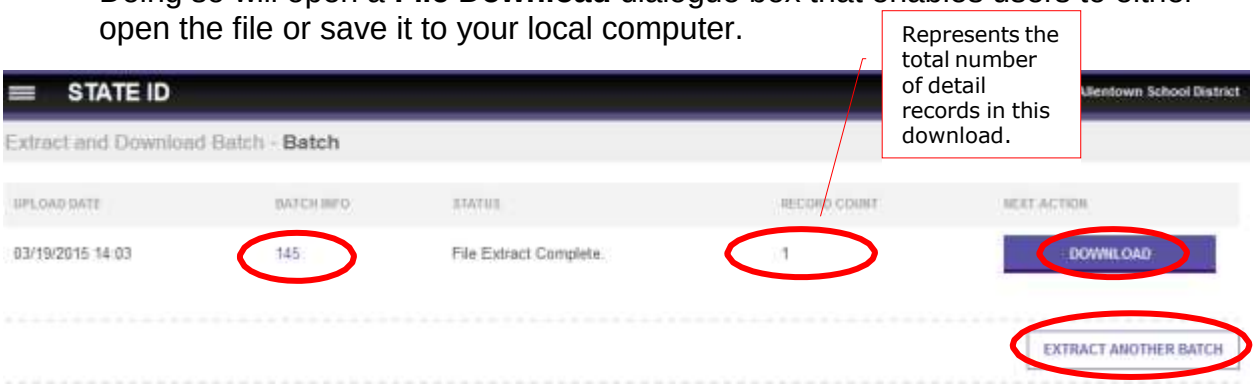
The application allows users to download a single file from the Download Batch component. To download a single file, users should perform the following steps:

1. Perform steps 1 through 5 from the above Filtering the List of Downloads section.

2. Click the EXTRACT RECORDS button for the appropriate batch.



3. Download the file by clicking the DOWNLOAD button in the Next Action column. Doing so will open a **File Download** dialogue box that enables users to either open the file or save it to your local computer.



4. Once the file is downloaded, users can return to the home page or extract another batch. To extract another batch, users should click the EXTRACT ANOTHER BATCH button.

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NOTE: *The file downloads in the default file format configured application-wide. If you wish to download in a different file format, you must use the Download with Options functionality.*

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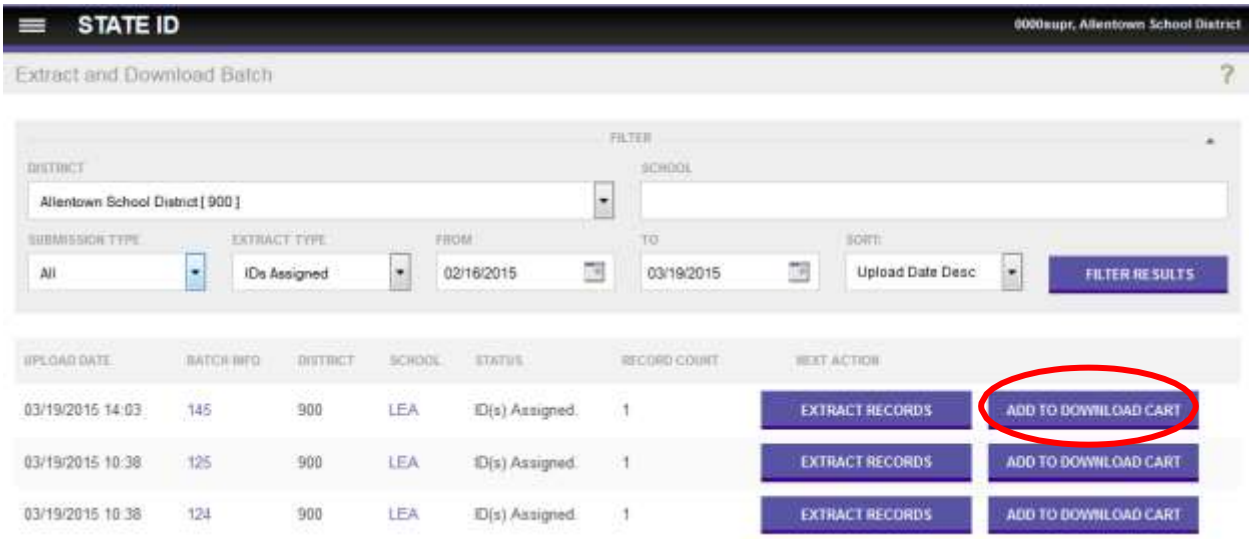
Downloading Multiple Files

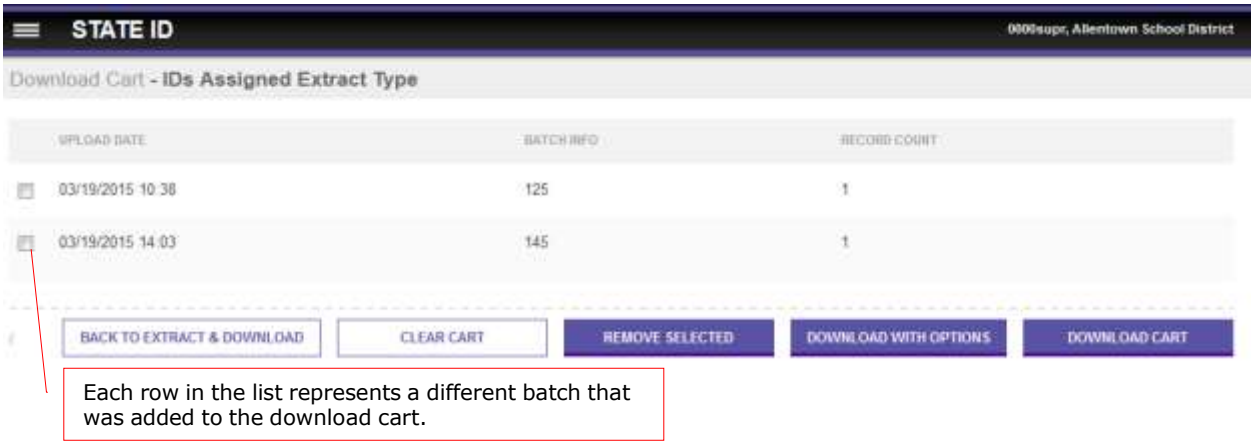
The application also allows users to download multiple files from the Extract & Downloads component. To download multiple files, users should perform the following steps:

1. Perform steps 1 through 5 from the above **Filtering the List of Downloads** section.

2. Click the ADD TO DOWNLOAD CART button for the appropriate batch.



3. The application will display a Download Cart page listing all batches that have been added to the cart along with information regarding the upload date, batch number, and record count. Users can also download the files in the cart, download with options, return to the Extract & Download page, remove selected records from the cart, and clear the cart.



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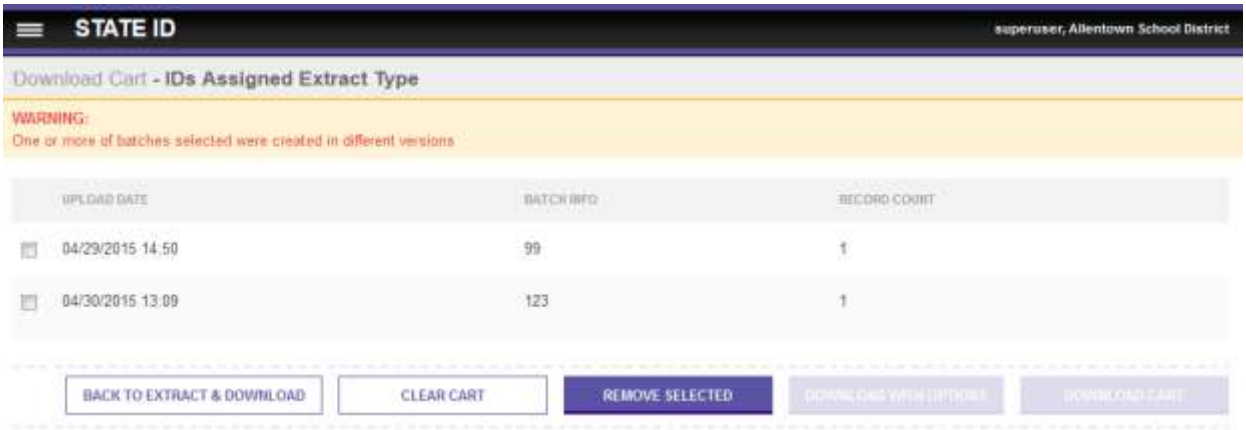
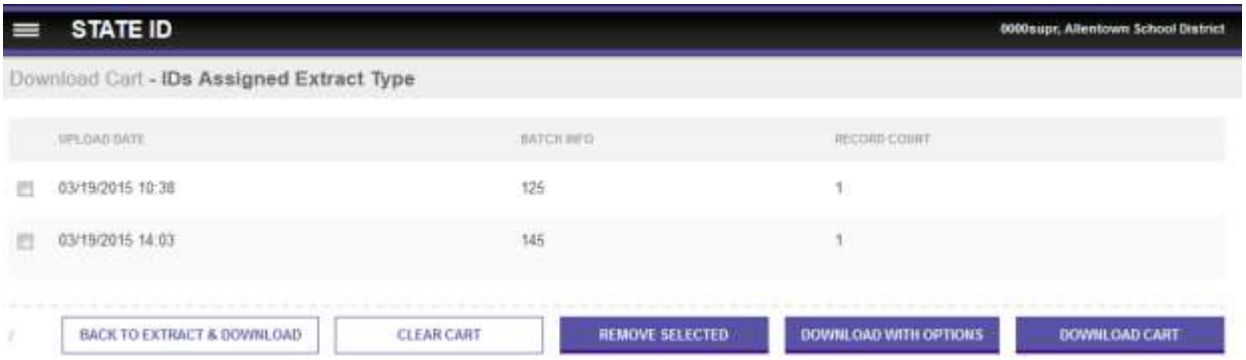
4. To continue adding batches to the cart, click the BACK TO EXTRACT & DOWNLOAD button.

5. Repeat steps 1 through 4 as necessary until all files are added to the cart.
6. The Download Cart will not allow users to download batches together in one file if the File Format versions are different between the batches.



7. If there are no errors with the files placed in the Download Cart, the application will allow the batches to be downloaded. All of the batches in the Download Cart will be combined into one file. Files using different File Formats cannot be combined.



8. Click the DOWNLOAD CART button to generate the download file.

9. Download the **Download Cart** file by clicking the DOWNLOAD button in the Next Action column. Doing so will open a **File Download** dialogue box that enables users to either open the file or save it to your local computer.

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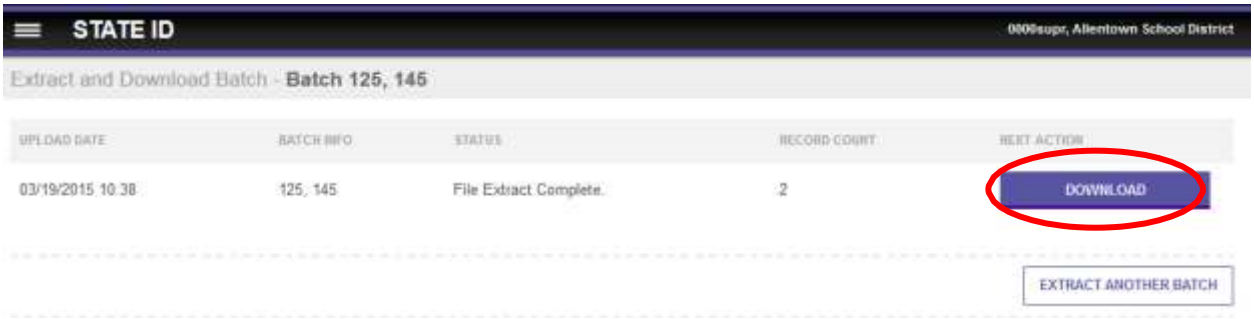
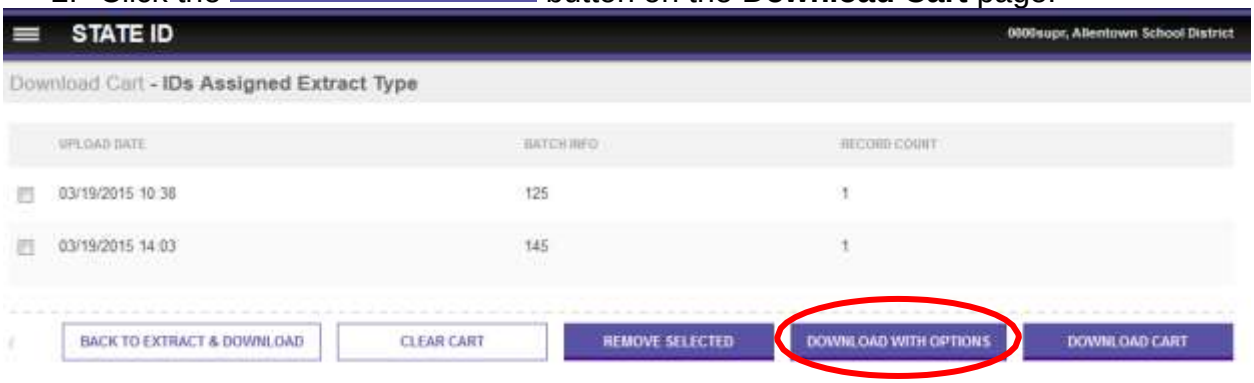


Downloading with Options

The **Download with Options** functionality allows users to select specific download options, such as field delimiter, field qualifier, date format and whether or not to include the header/footer in the file. To use this functionality, users should perform the following steps:

1. Repeat steps 1 through 5 from the **Downloading Multiple Files** sections above.
2. Click the DOWNLOAD WITH OPTIONS button on the **Download Cart** page.



3. The **Download Options** page will display the available selections in a form, allowing the user to select specific download options. Users can choose from the following options:

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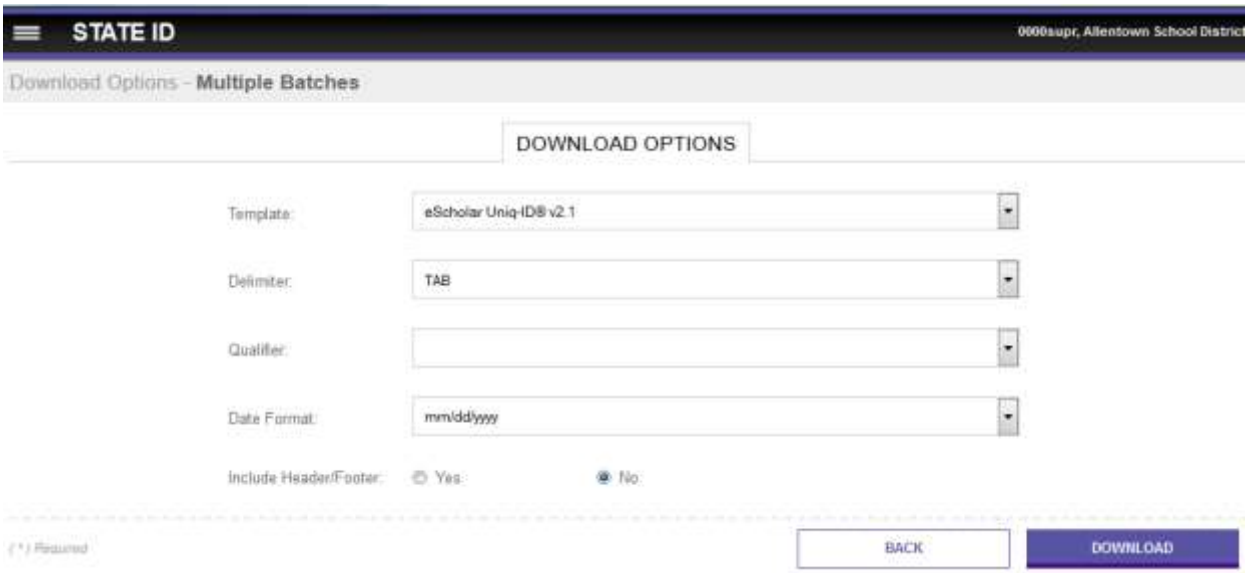

a. *Template*: eScholar Uniq-ID® v1.0, eScholar Uniq-ID® v2.1, or eScholar Uniq-ID® v3.0

b. *Field Delimiter*: The options for this selection are Tab or Comma.

c. *Field Qualifier*: The options for this selection are “ and ‘.

d. *Date Format*: The options for this selection are:
   - mm/dd/yyyy
   - mm/d/yyyy
   - ISO YYYY-MM-DD
   - m/d/yyyy
   - m/dd/yyyy

NOTE: *The selected date format is not applied to the Errors To Fix and Canceled Extract Types. These dates will be extracted in the format that they were submitted. Since the dates for these Extract Types could be invalid, the application must extract the data as it was submitted.*

e. *Include Header / Footer*: The options for this selection are Yes and No. When No is selected, the header and footer will not be included in the extracted filed.

4. Select the download options.

5. Click the DOWNLOAD button.

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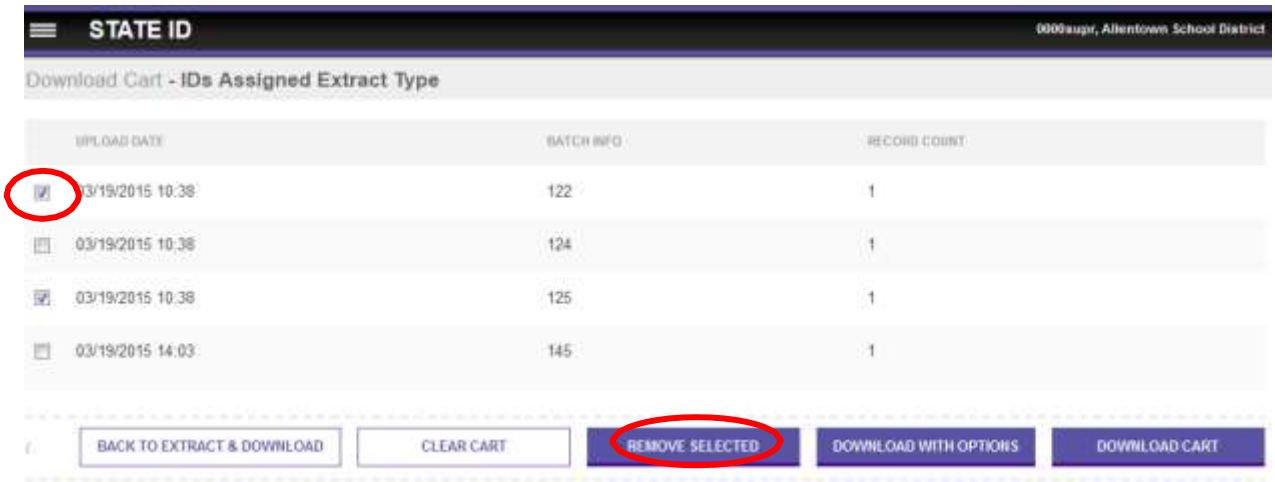
Removing Batches from the Download Cart

To remove individual batches from the cart, select the checkbox(es) to the left of the batch and then click the REMOVE SELECTED button.

To remove ***all batches*** from the cart, click the CLEAR CART button.



Viewing the Download Cart

The Download Batch main page contains a VIEW DOWNLOAD CART button that allows users to view all batches currently stored in the cart. To view the contents of the Download Cart, users should click the VIEW DOWNLOAD CART button.

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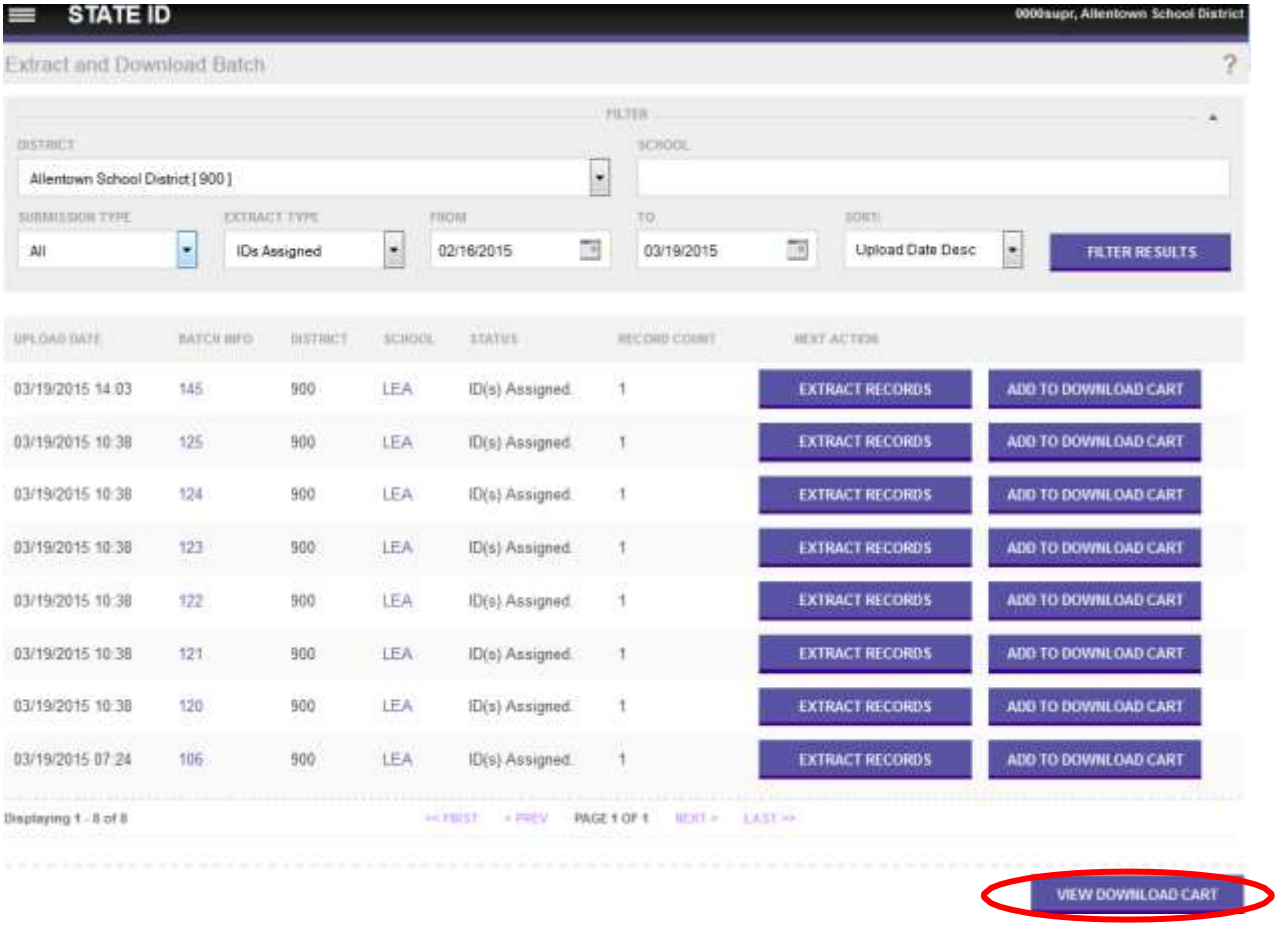
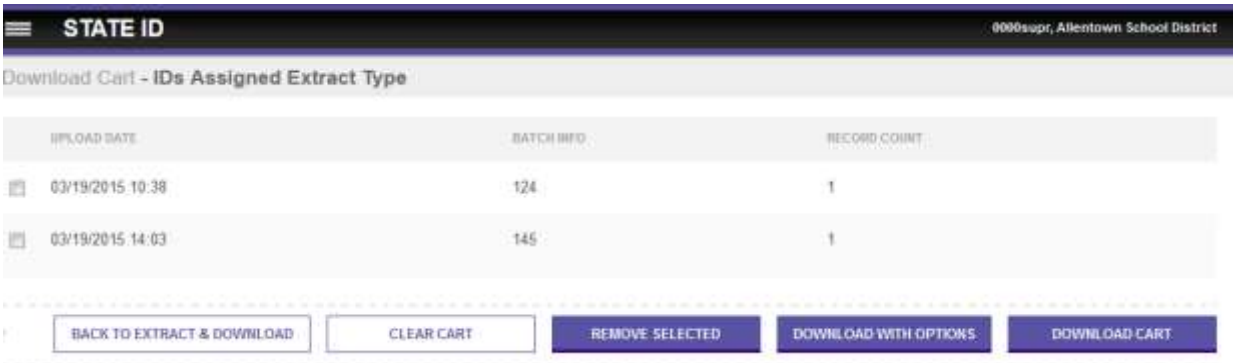


The application will display the Download Cart page, allowing the user to download files, remove files or to clear the cart as described in this section.



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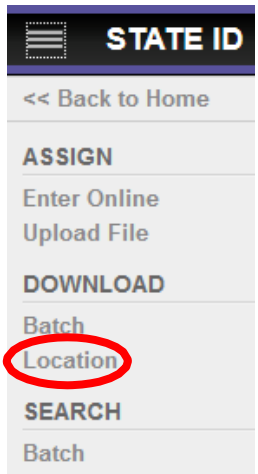
DOWNLOAD > LOCATION

About Download Location

The Download Location component allows users to download all of the student records from a specific district or school, rather than by batch. This component is only available to authorized users and is restricted only to the locations the user has access to.



Users can search for student records with a batch file by clicking the **Location** link under **DOWNLOAD** from the *Main Menu*:

This feature will allow user to perform the following actions:

- Search for a location.
- Download student records from a specific location.

Some implementations may disable this feature for certain or all users. In such an instance, the link will not appear on the Menu.

Searching for a Location

The **Download By Location** component allows users to search for a specific location within the application. This is especially helpful when the list of available locations is large. To search for a specific location, users should perform the following steps:

1. Click the **Download By Location** link on the *Menu.*
2. The application will display a list of districts and locations / schools that the user has access to on the **Download By Location** details page. This page includes the District Code, School Code, Agency Name, a Download button and the ability to search locations.

PLACEHOLDER FOR

- Active Student Flag Added to Download by Location Report

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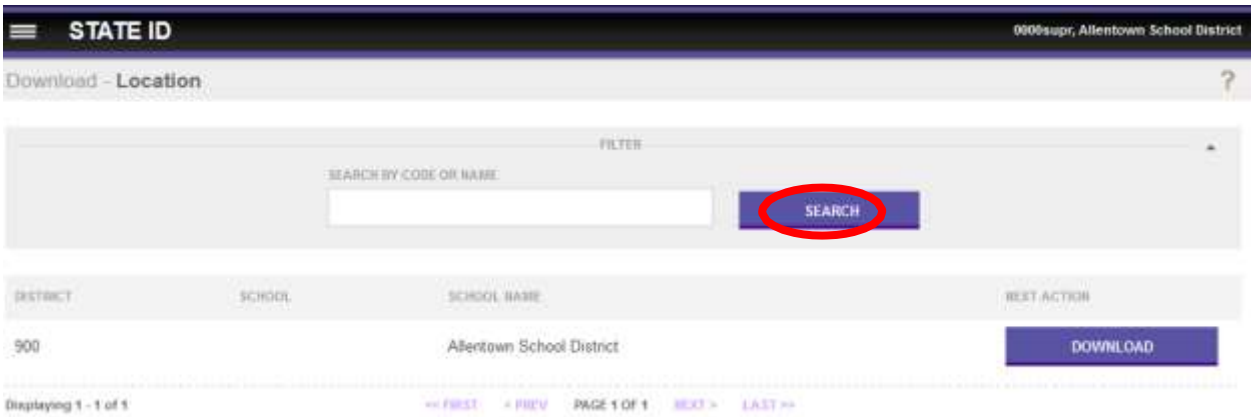

3. The search feature allows users to search by the district code, school code or agency name.
4. Enter the text to search for in the Search form.
    a. When a *number* is typed into the search form, the application searches for all of the districts and schools with that code.
    b. When *partial numbers* are typed into the search form, the application searches for all of the districts and schools with that partial number.
    c. When *text* is used, the application searches for all of the agency names matching the search phrase.

NOTE: *Based on items a through c above, the more detailed the search phrase the finer the search. Typically, less results are displayed when more numbers or text are included in the search phrase.*

5. Click the SEARCH button.
6. The application will display the results on the **Download Location** details page.
7. To fine tune the search, add addition search text / numbers as needed.
8. Proceed to the **Downloading Location** section below

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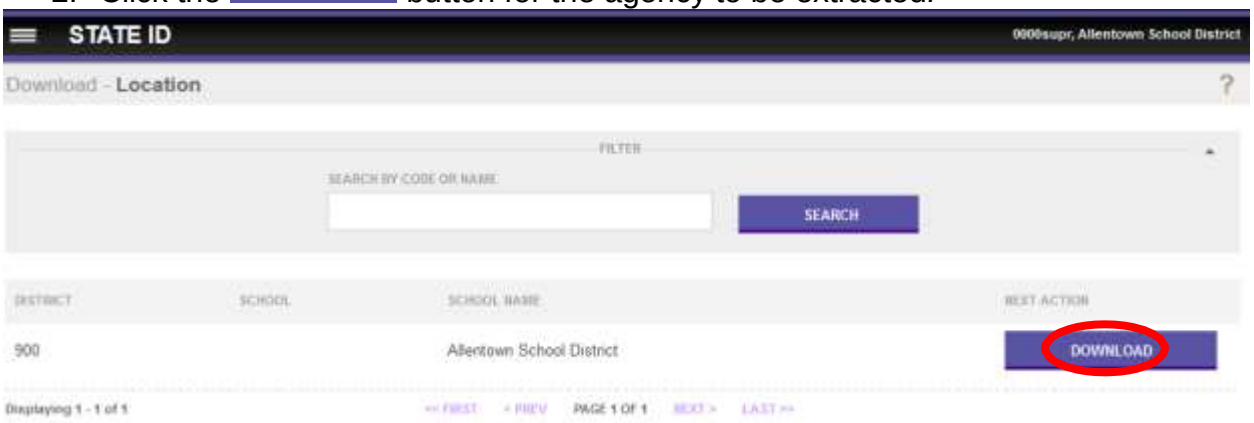
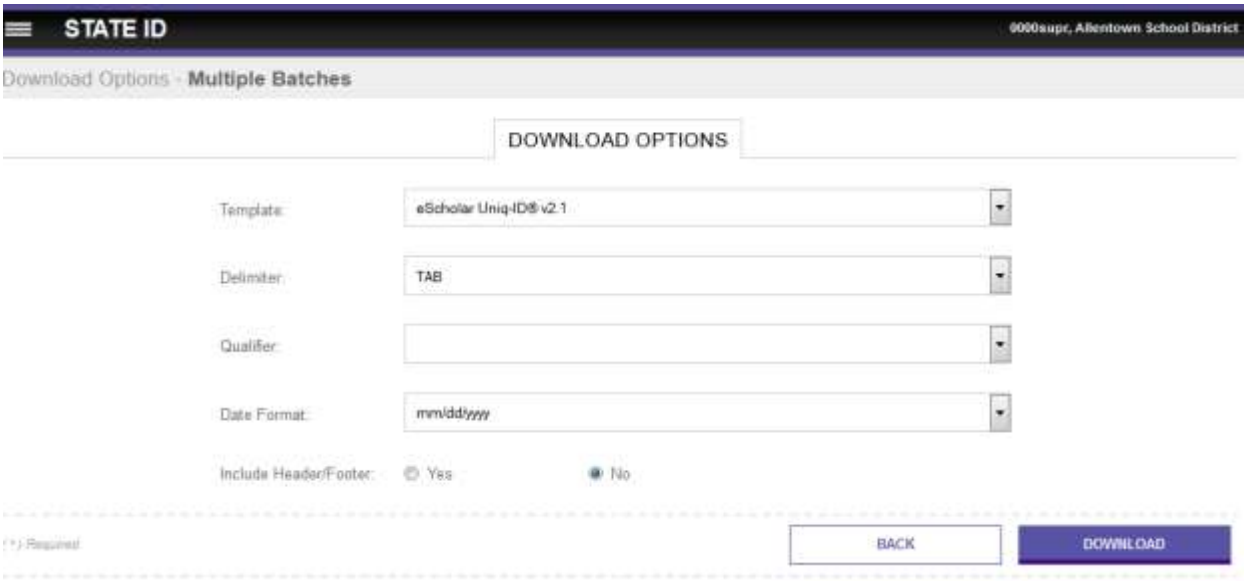
Steps

To use the **Download Location** component, users should perform the following steps:

1. Follow steps 1 through 7 above.
2. Click the DOWNLOAD button for the agency to be extracted.



3. The application will display a **Download Options** page.



6. The **Download Options** page will display the available options in a form, allowing the user to select specific download options. The step for Downloading with Options for Download By Location is the exact same as the **Extract & Download - Download with Options** section above. Users can select from the following options:
   a. *Template* - eScholar Uniq-ID® v1.0, eScholar Uniq-ID® v2.1, or eScholar Uniq-ID® v3.0
   b. *Field Delimiter*: The options for this selection are Tab or Comma.

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c. *Field Qualifier*: The options for this selection are “ and ‘.

d. *Date Format*: The options for this selection are:
   - mm/dd/yyyy
   - mm/d/yyyy
   - ISO YYYY-MM-DD
   - m/d/yyyy
   - m/dd/yyyy

e. *Include Header / Footer*: The options for this selection are Yes and No. When No is selected, the header and footer will not be included in the extracted file.

4. Select the appropriate download options.
5. Click the DOWNLOAD button.
6. The Download Location download page will be displayed. Click the **here** link in the Status column.

7. Click the EXTRACT ANOTHER LOCATION button to return to the Download Location page.

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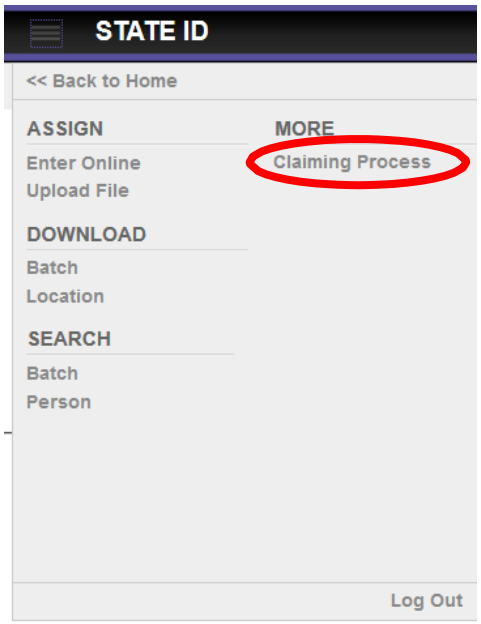
CLAIMING PROCESS

About Claiming



Users can download files related to the eUID application by clicking the **Claiming Process** link under the **MORE** in the Main *Menu*:
This feature allows users to:

- View existing claims.
- Search for a claim.
- Create a new claim.
- Respond to a claim.
- Delete a claim.
- Verify a claim.
- Resend a claim-related email.
- Download a claim-related extract file.
- Add student notes.

Some implementations may disable this feature for certain or all users. In such an instance, the link will not appear on the Menu.

Claiming allows users to handle situations when a student transfers from one public school/district to another within the state. It provides a mechanism for the districts / schools to communicate with each other via automated emails in order to create and respond to claims for a transferring student. Users can use the Claiming Process component to manage these claims, including the ability to create, dispute, and delete claims.

NOTE: *Some implementations may disable this feature. In such an instance, the* ***Claiming Process*** *link will not appear on the Menu.*

NOTE: *Some implementations may allow Auto Claiming. When the system administrator enables Auto Claiming, claims will be created automatically by the Gaining School during the ID Assignment process if necessary. If this feature is disabled, claims will not be created automatically and must be created manually by a user.*

NOTE: *Some implementations may allow Auto Accepting of claims. When the system administrator enables Auto Accepting of claims, claims will be accepted automatically by the Losing School when a claim is created. If this feature is disabled, claims will not be accepted automatically and must be accepted manually by a user.*

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Viewing Claims

Users can use the Claiming Process page to view a list of existing claims, filter the list of the claims, and perform other tasks as described in the sections below.
To view and filter claims, users should perform the following steps:

1. Click the **Claiming Process** link on the *Menu.*
2. The Claiming Process page will display the following columns:
    a. *Claim Date*: This is the date the claim was initially created.
    b. *Claim ID*: This is the unique identifier for the claim, assigned when the claim is created.
    c. *State ID*: This is the State ID assigned to the student involved in the claim.
    d. *Person Name*: This is the name of the student involved in the claim.
    e. *Losing School*: This is the name of the school / district where the student transferred from.
    f. *Gaining School*: This is the name of the school / district where the student transferred to.
    g. *Status*: This is the status of the claiming process and will be one of the following:
        - Claimed
        - Responded
    h. *Verified*: This is the verification status of the claim. Verification of claims is discussed later in the **Verifying a Claim** section below.
    i. *Next Action*: This button will change based on the Status of the claim. It can display a Respond, Details, or Delete button. Descriptions of these processes are described below.

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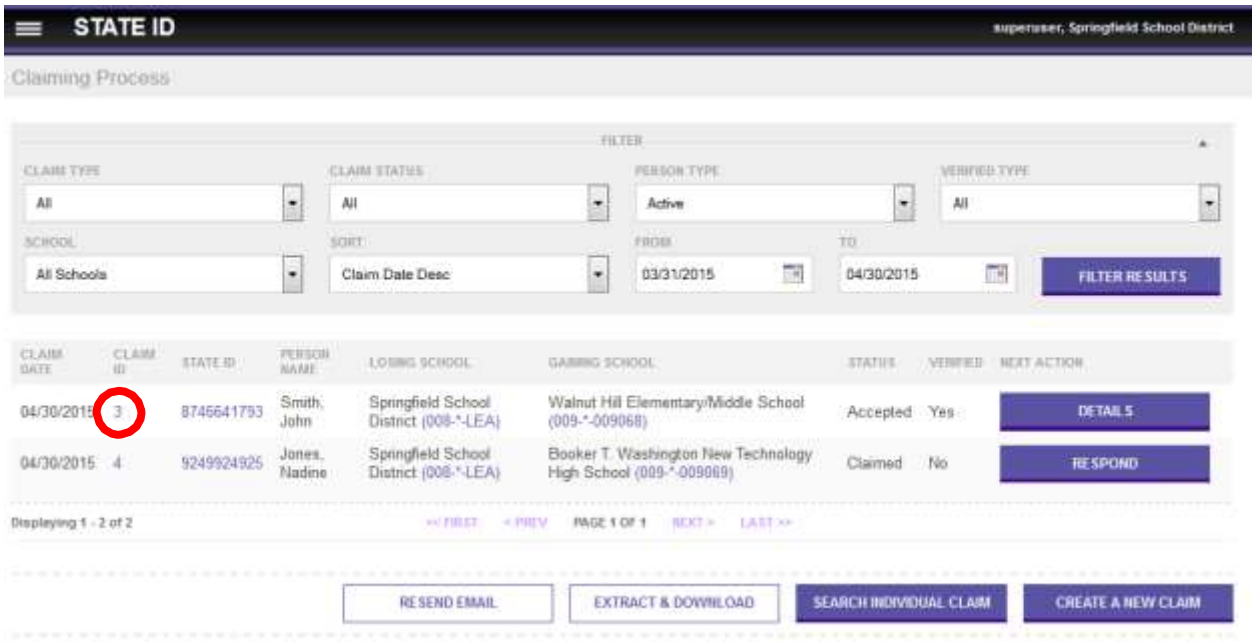

3. To display details about an individual claim, click the link in the Claim ID column on the Claim Process page.
4. To display details about a specific student, click the link in the State ID column.
5. To display details about a Losing or Gaining School, click the link in the appropriate Losing or Gaining School column.
6. To filter the list of claims displayed on this page, set the appropriate filters and click the FILTER RESULTS button. Users can filter on the following:
    a. *Claim Type*: This includes Auto Claim and Manual Claim.
    b. *Claim Status*: This includes All, Claimed, Responded and Deleted
    c. *Person Status*: This includes Active and Retired.
    d. *Verified States*: This includes All, Yes and No.
    e. *Date Range*: This allows the user to specify any valid date range.
    f. *School*: This includes All Schools and a list of available schools for the user.
7. To sort the list of claims, set the appropriate sort filter and click the FILTER RESULTS button.

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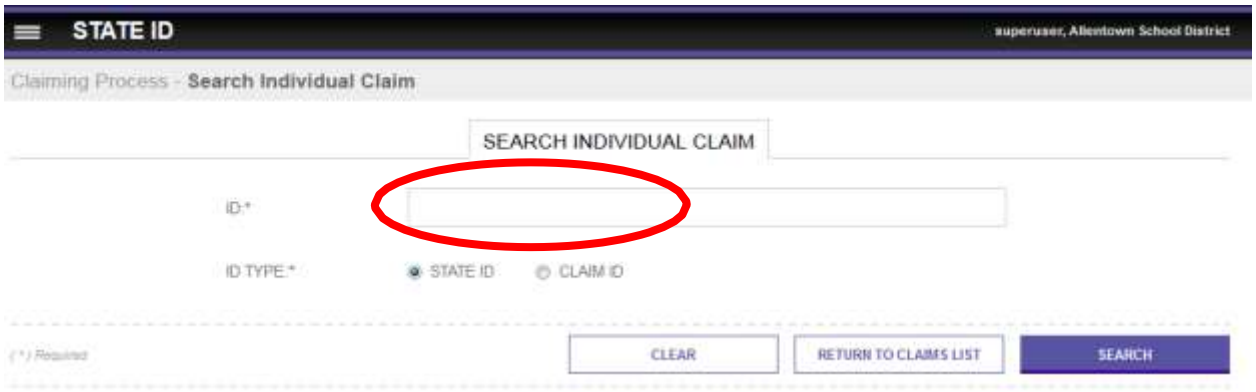
Searching for a Claim

The Claiming Process module provides the ability to search for a specific claim. This allows users to find a claim by Claim ID or State ID. To search for a claim, users should perform the following steps:

1. Click the **Claiming Process** link on the *Menu.*
2. The Claiming Process page will display several options, including a SEARCH INDIVIDUAL CLAIM button. Click this button to proceed.
3. The Search Individual page will be displayed allowing the user to search by State ID or Claim ID. Enter the Claim ID or State ID.

> ***TIP:*** *The **Claim ID** for a claim can be found on the module's main page or when viewing the details about a claim.*



4. Click the SEARCH button.
5. The results of the search will be displayed. If no results are found for that State ID or Claim ID, the application will indicate "No claims found." If a user searches by Claim ID, the application will display that claim at the bottom of the page. If a user searches by State ID, the application will display a list of all claims for that State ID.

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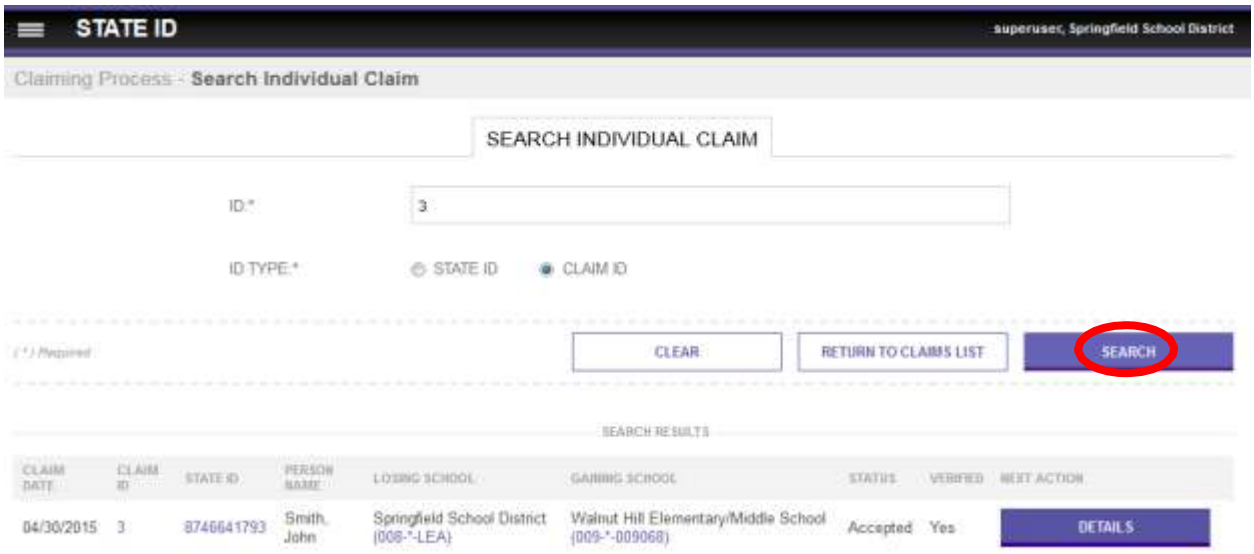

6. Additional details can be reviewed for the claim by clicking the Details button.

Creating a Claim

When a student transfers schools, the school / district the student transferred to (Gaining School) can submit a claim to the school / district the student transferred from (Losing School). To create a claim, users should perform the following steps:

1. Click the **Claiming Process** link on the *Menu.*
2. The **Claiming Process** page will be displayed. This page will allow users to filter claims, search for claims, extract a claim, resend a claim, and respond to a claim. These options are described further throughout the **Claiming Process** section.

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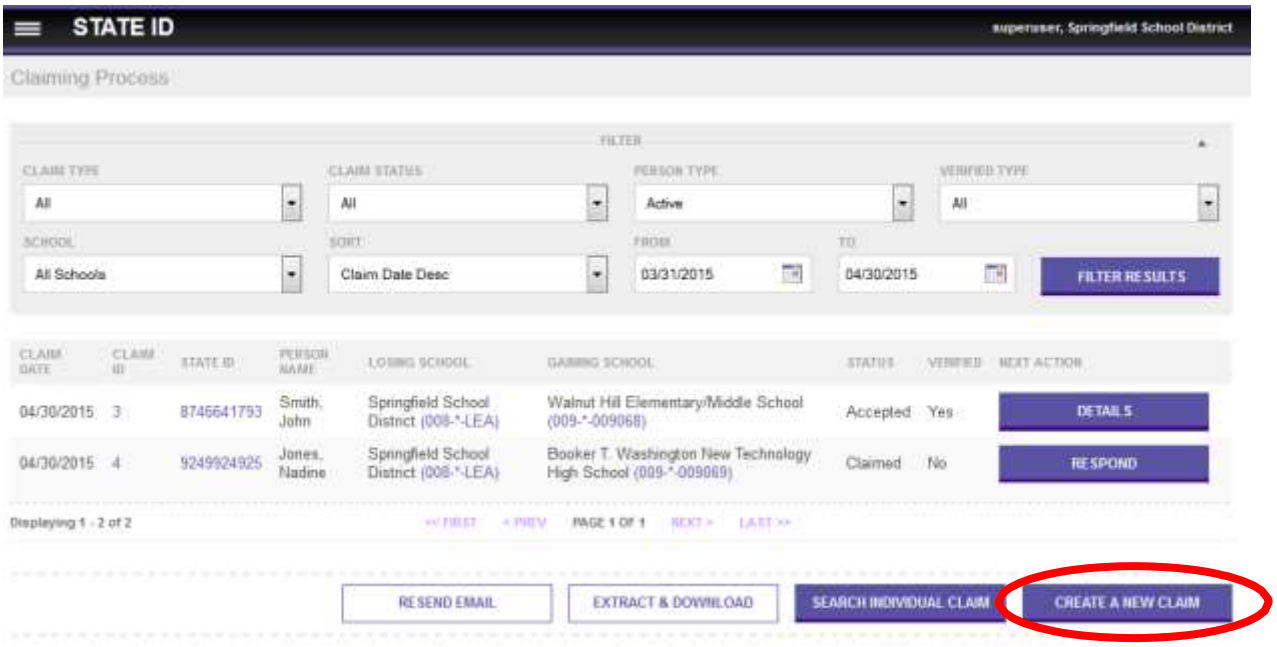

3. To proceed with creating a claim, click the **CREATE A NEW CLAIM** button.
4. Enter a valid State ID for the student transferring to the Gaining School.
5. Click the **SEARCH** button.

> ***NOTE:*** *The application will verify if the State ID entered is valid and also if the claim request itself is valid. For example, a school cannot claim a student that is already enrolled in that school. In such instances, the application will provide the user with proper feedback.*

6. Verify the student details listed on the student Information page.
7. Select / Enter details about the claim. The user should select / enter the following options:
   a. *School*: Use the dropdown menu to select the school the student is transferring to. This is a required field.
   b. *Grade Level*: Use the dropdown menu to select the grade level. This is a required field.
   c. *Claim Date*: Either type a valid date or use the calendar button to select a date. This is a required field.
   d. *Email*: Either type a valid email address of the Gaining School contact student or use the **SELECT EMAIL** button to the right of the email field to select an email address. Users can select the email from the list and click

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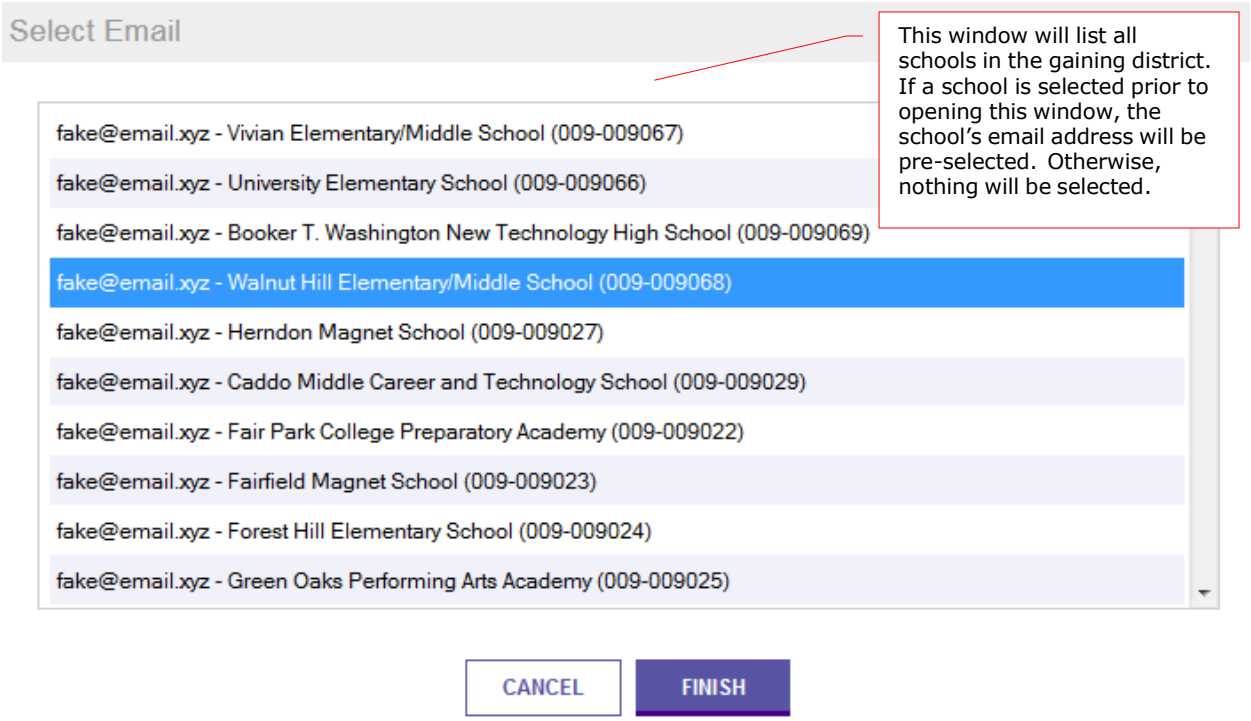
FINISH. Upon doing so, the email address the user selected will be placed in the Gaining School's email address. This is a required field.



e. *CC1 - CC3*: Enter a valid email address.

f. *Comments*: Enter any necessary comments.

g. *Email Option*: Click the checkbox to send a copy of the email to the sender

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STATE ID — superuser, Allentown School District

Claiming Process - **Create A New Claim**

PERSON INFORMATION (STATE ID: 8746641793) CREATED 04/30/2015

ADD NOTE

GENERAL INFORMATION

FIRST NAME	John
MIDDLE NAME	
LAST NAME	Smith
ALT LAST NAME	Gallagher
SUFFIX	
GENDER	MALE
DATE OF BIRTH	09/05/1999

ENROLLMENT INFORMATION

GRADE PLACEMENT	Tenth
SCHOOL/SITE CODE	008- LEA Springfield School District
LEA	008
RES DISTRICT	008
ENDING SCHOOL SESSION LEA	2015
LOCAL ID	8
SOURCE SYSTEM	SIS
ALTERNATE ID	
ALTERNATE ID SOURCE	

BATCH INFORMATION

LAST BATCH #	130
LAST UPDATED	04/30/2015 13:34
UPDATE REFERENCE #	51225
CREATED	04/30/2015 13:34

CUSTOMER DEFINED FIELDS

STREET ADDRESS PHYSICAL	20 Columbus Ave
CITY PHYSICAL	Stamford
STATE	VA
ZIP CODE PHYSICAL	06905
PARENTAL CONSENT FLAG	No

NEW CLAIM INFORMATION

GAINING SCHOOL/SITE CODE		LOSING SCHOOL/SITE CODE	
LEA	Allentown School District (009)	LEA	Springfield School District (008)
SCHOOL/SITE CODE *	Walnut Hill Elementary/Middle School [009-*-00906E	SCHOOL/SITE CODE	Springfield School District (LEA)
GRADE PLACEMENT *	Tenth	GRADE PLACEMENT	Tenth
CLAIM DATE *	04/30/2015	RESPONSE DATE	
EMAIL *	fake@email.xyz SELECT EMAIL	EMAIL *	fake@email.xyz
CC1		CC1	fake@email.xyz
CC2		CC2	
CC3		CC3	
COMMENTS *	(maximum length 255 characters)	COMMENTS	(maximum length 255 characters)
EMAIL OPTION	Copy Mail to Sender		

(*) Required

RETURN TO CLAIMS LIST | CREATE CLAIM

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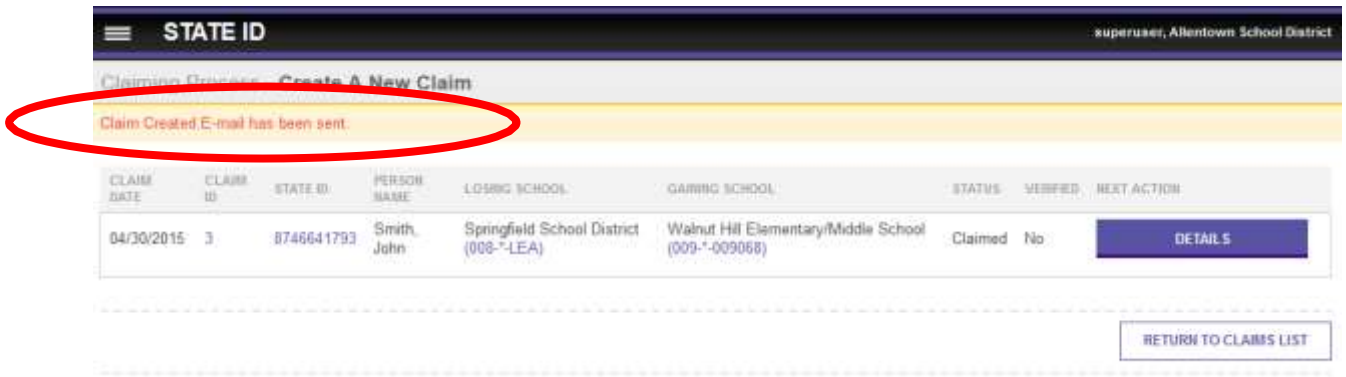
8. Click the CREATE CLAIM button to complete the claim request.
9. If JavaScript is enabled in the browser, users will be prompted with a confirmation dialog box and should click the OK button. If JavaScript is not enabled, no prompt is displayed.
10. The application will return a *Claim Creation Confirmation* page. This page indicates whether or not the claim was created and also if the claim email was sent to the school losing the student. If an email was not successfully sent, the user can use the Resend Email feature to try again:



11. Click the RETURN TO CLAIMS LIST button to exit the confirmation page.

> ***NOTE:*** *For every claim that is created, the application will create a batch.*

Responding to a Claim

Once a claim is created, the application automatically sends an email to the Losing School. The email informs the school that one of their former student records is being claimed by the Gaining School. The Losing School then has to respond to the validity of the claim. The Losing School can Accept the Claim or Dispute the Claim in the response.

During the process of responding to a claim, the application will display a Claims Details page. This page contains all the information needed to enable the user from the Losing School to make a determination in the application as to whether or not to Accept or Dispute a claim.

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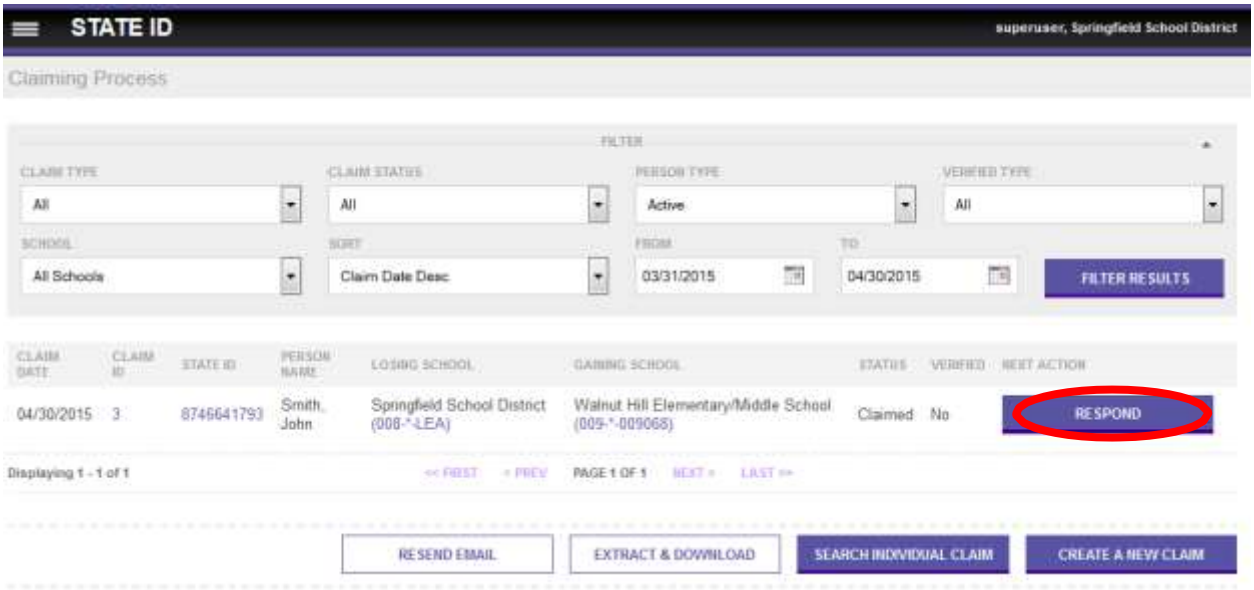
Accepting Claims

When a Losing School accepts the claim, the student record is updated and the Gaining School obtains control of that student record. The Gaining School receives an email from the application indicating the acceptance of the claim. To accept a claim, users should perform the following steps:

1. Click the **Claiming Process** link on the *Menu.*
2. The **Claiming Process** page will display a list of claims. This list will include any claims that apply to the district / school either as the Gaining or Losing School.

> ***NOTE:*** *With some implementations, the application auto-accept all claims. In such instances, the Losing School does not have to respond to the claim. However, the Losing School still receives an email notifying them of the Gaining School's claim.*

3. When a response is expected, a RESPOND button will be displayed. Click this button to respond to the claim.



4. The application will display the Claim Details page for the selected claim. The user can accept the claim, dispute the claim, return to the claim list, add a note, or view transaction information from this page.
5. Adjust the Response Date and Email information as necessary.
6. Enter comments into the Comments field.

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NOTE: *The information typed into the comments field will be included in the email sent to the Gaining School.*

7. Click the ACCEPT CLAIM button.

NOTE: *In Version 6.x, when a claim is accepted, all of the student information is updated from the submission file data. In previous versions only the school and district code were updated in the master record. In 7.x the source system is updated to the default source system for manual claims.*

8. If JavaScript is enabled in the browser, users will be prompted with a confirmation dialog box and should click the OK button. If JavaScript is not enabled, no prompt is displayed.
9. The Claims Details page will display a System Message along with other details about the claim.
10. Click the RETURN TO CLAIMS LIST button to continue processing claims.

Disputing Claims

When a Losing School disputes the claim, the Losing School retains control of that student record. The Gaining School receives an email from the application indicating the disputed claim. To dispute a claim, a user should perform the following steps:

1. Perform steps 1 through 6 from the Accepting Claims section.
2. Click the DISPUTE CLAIM button.
3. The Claims Details page will display a System Message along with other details about the claim.
4. Click the RETURN TO CLAIMS LIST button to return to the home page.

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Deleting a Claim

At any time before the Losing School responds to a claim, the Gaining School can delete a claim. When a claim is deleted, the Losing School receives an email indicating that the claim was deleted. When a claim is deleted, the status is changed to Deleted. To delete a claim, a user should perform the following steps:

1. Click the **Claiming Process** link on the *Menu.*
2. The **Claiming Process** page will display a list of claims. This list will include any claims that apply to the district / school either as the Gaining or Losing School.
3. Click the DETAILS button for the claim to be deleted.
4. The Claims Details page will be displayed allowing the user to delete a claim, view transaction information and return to the claims list.
5. Click the DELETE CLAIM button.

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Personalized education starts at eScholar.

STATE ID — superuser, Allentown School District

Claiming Process - **Claiming Details**

PERSON INFORMATION (STATE ID: 8746641793) CREATED 04/30/2015

ADD NOTE

GENERAL INFORMATION

FIRST NAME	John
MIDDLE NAME	
LAST NAME	Smith
ALT LAST NAME	Gallagher
SUFFIX	
GENDER	MALE
DATE OF BIRTH	09/05/1999

ENROLLMENT INFORMATION

GRADE PLACEMENT	Tenth
SCHOOLSITE CODE	008- LEA Springfield School District
LEA	008
RES DISTRICT	008
ENDING SCHOOL DESIGN LEA	2015
LOCAL ID	8
SOURCE SYSTEM	SIS
ALTERNATE ID	
ALTERNATE ID SOURCE	

BATCH INFORMATION

LAST BATCH #	130
LAST UPDATED	04/30/2015 13:34
UPDATE REFERENCE #	51225
CREATED	04/30/2015 13:34

CUSTOMER DEFINED FIELDS

STREET ADDRESS PHYSICAL	20 Columbus Ave
CITY PHYSICAL	Stamford
STATE	VA
ZIP CODE PHYSICAL	06905
PARENTAL CONSENT FLAG	No

CLAIM INFORMATION (CLAIM ID: 3)

GAINING SCHOOLSITE CODE		LOSING SCHOOLSITE CODE	
LEA	Allentown School District (009)	LEA	Springfield School District (008)
SCHOOLSITE CODE	Walnut Hill Elementary/Middle School (009068)	SCHOOLSITE CODE	Springfield School District (LEA)
GRADE PLACEMENT	Tenth	GRADE PLACEMENT	Tenth
CLAIM DATE	04/30/2015	RESPONSE DATE	
EMAIL	fake@email.xyz	EMAIL	fake@email.xyz
CC1		CC1	fake@email.xyz
CC2		CC2	
CC3		CC3	
COMMENTS	(maximum length 255 characters)	COMMENTS	(maximum length 255 characters)
CLAIM STATUS	Claimed		
EMAIL STATUS	Sent		

RETURN TO CLAIMS LIST DELETE CLAIM

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6. If JavaScript is enabled in the browser, users will be prompted with a confirmation dialog box and should click the OK button. If JavaScript is not enabled, no prompt is displayed.
7. The Claims Details page will display a System Message along with other details about the claim. An email is also automatically sent to the Losing School notifying them that the claim was deleted.
8. Click the RETURN TO CLAIMS LIST button to continue processing claims.

Verifying a Claim

The **Claiming Process** module allows Losing Schools to verify a claim. This process, which is new to Version 6.0.0, is meant to provide the Losing School with a method of indicating which claims have been reviewed and verified. This is especially helpful when Auto Accepting of Claims is enabled. The Verified column on the Claiming Process page indicates the verification status of each claim. This will indicate either Yes or No. By verifying a claim, the Losing School is indicating that they have reviewed the status of the claim and verify that no further review is required. Verification is only available for Accepted Claims. To verify a claim, users should perform the following steps:

1. Click the **Claiming Process** link on the *Menu.*
2. Click the DETAILS button for an Accepted Claim. The status of the claim is displayed in the Status column.
3. Review the details of the accepted claim.
4. Click the MARK VERIFIED button.
5. The application will update the Verified status to Yes for the claim.

   Claim Status: Accepted
   Verified Status: Yes
   Email Status: Not Sent

6. Click the RETURN TO CLAIMS LIST button to continue processing claims.

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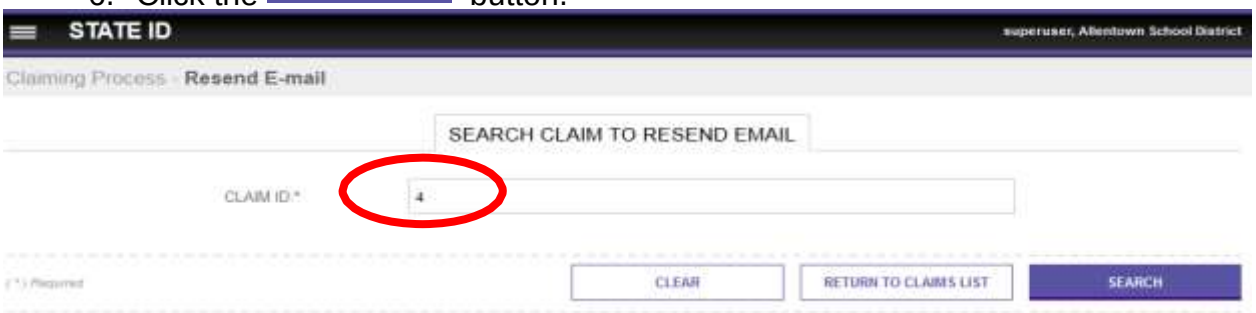
Resending a Claim-Related Email

The Claiming Process module allows users to resend any claim-related emails (claim created, claim deleted, or claim disputed). In some instances, an email sent by the Claiming Process module might need to be resent. To resend an email through the application, users should perform the following steps:

1. Click the **Claiming Process** link on the *Menu.*
2. The **Claiming Process** page will display a list of claims. This list will include any claims that apply to the district / school either as the Gaining or Losing School.
3. Identify the Claim ID that requires the email to be resent.
4. Click the RESEND EMAIL button on the Claiming Process page.
5. A Resend Email page will be displayed, requiring the user to enter the appropriate Claim ID. Enter this Claim ID.
6. Click the SEARCH button.



7. Review the Claim Details page. This page lists all the details about the selected claim and a link to view the transaction reference information.
8. Click SEND EMAIL to resend the most recent email for that claim.
9. The Claims Details page will display a System Message along with other details about the claim.

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10. Click the RETURN TO CLAIMS LIST button to continue processing claims.

NOTE: *The eUID application only resends the most recent claim- related email. For example, if a claim is created and then deleted, users cannot resend the* ***Claim Creation*** *email.*

NOTE: *Users may only resend the type of email that they generated for a claim. That is, the Gaining School cannot resend the email that the School Losing sent when the claim was disputed. The application will notify a user when they cannot resend an email from a particular claim.*

Extracting & Downloading Claim-Related Files

The Claiming Process module allows users to extract and download claim-related files for offline review. The following files are available for download:

- *Accepted Claims*
- *Disputed Claims*
- *Deleted Claims*
- *Pending Claims*

To use extract and download a file, users should perform the following steps:

1. Click the **Claiming Process** link on the *Menu.*
2. The **Claiming Process** page will display a list of claims. This list will include any claims that apply to the district / school either as the Gaining or Losing School along with a EXTRACT & DOWNLOAD button.

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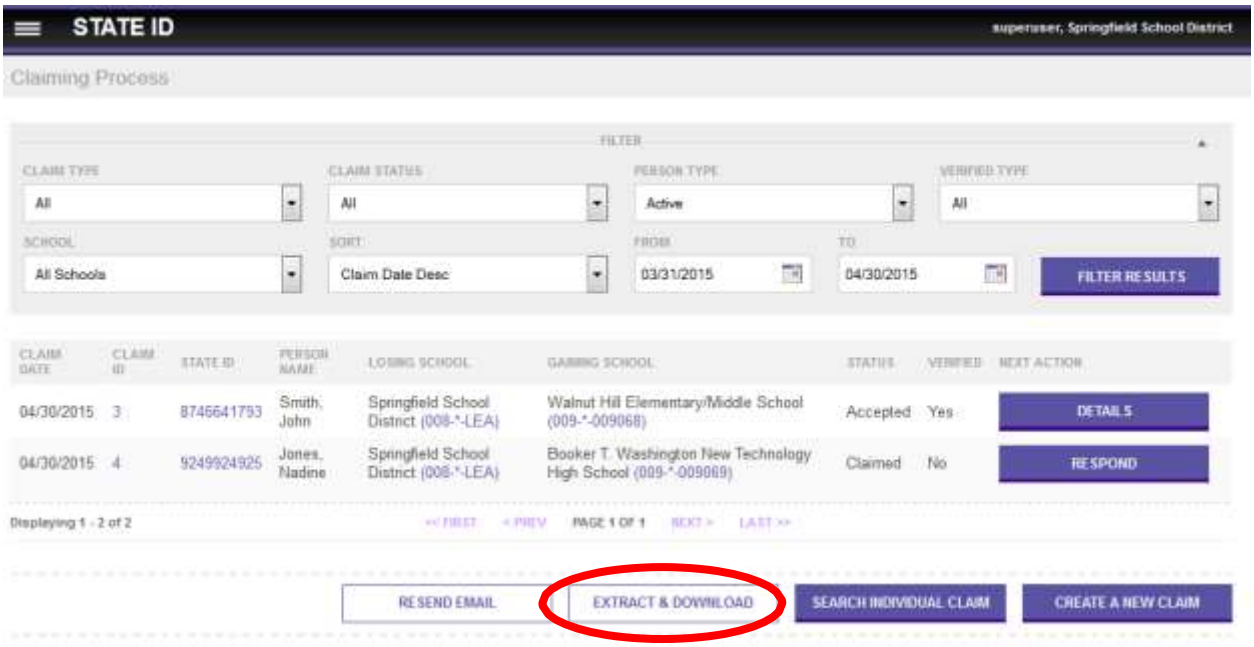

3. Click the EXTRACT & DOWNLOAD button.
4. The Extract & Download page will display a list of claims along with the filtering options. Users can filter this page by the following:
   a. *Submission Type*: The options are All, Auto Claim, or Manual Claim.
   b. *Extract Type:* The options are Accepted Claims, Disputed Claims, Deleted Claims, or Pending Claims.
   c. *Sort:* Users can sort by Upload Date or Batch Number.
   d. *Upload Date:* This refers to the claim date.
5. Select the appropriate filter options and click the FILTER RESULTS button.

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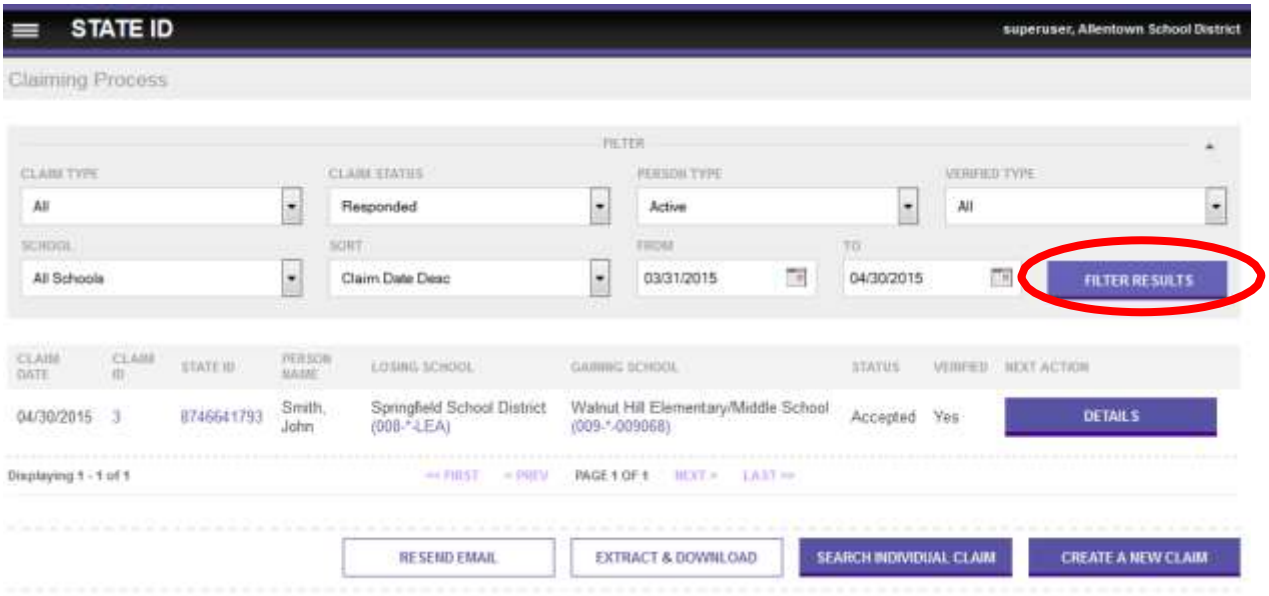

6. All of the claims matching the filter options will be displayed in the list.
7. The **Claiming Extract & Download** functionality works the same as the **Download Batch** process described above in the **Download Batch** section, with the exception of the available filters. That is, users can extract and download individual files or multiple files, delete files from the cart, or clear the cart. Please review **Download Batch** section above for detailed information.
8. Extract individual or multiple records as described in the **Download Batch** section above.

Adding student Notes

Similar to the student Search module, student notes are available in claim processing. To add student Notes from the Claiming Process component, a user should perform the following:

1. Click the **Claiming Process** link on the *Menu*.
2. The **Claiming Process** page will display a list of claims.
3. Click the DETAILS button.
4. Click the ADD NOTE link.

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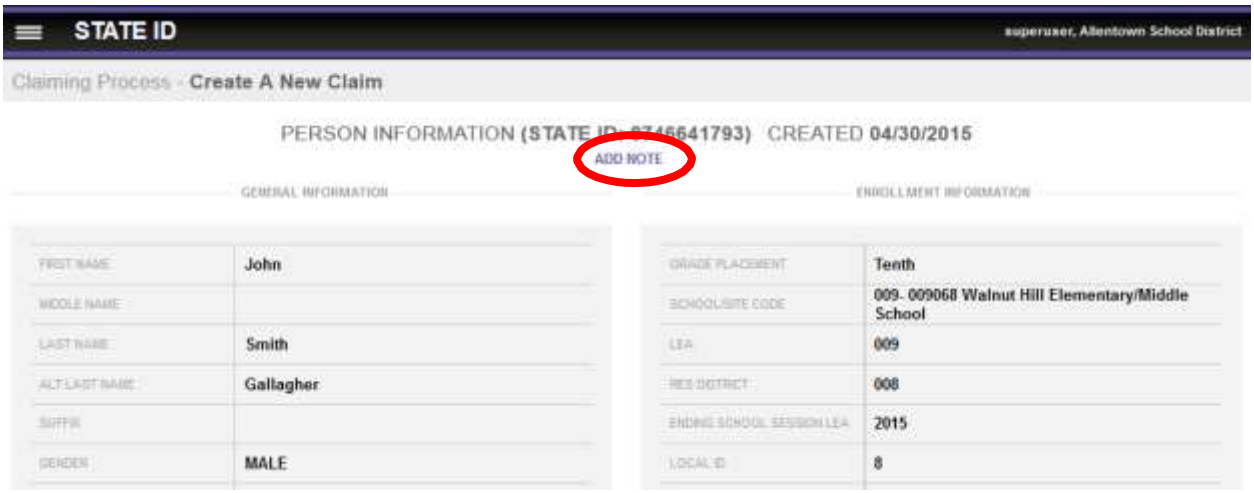

5. The Add student Note page will be displayed. This page will allow users to enter up to 255 characters of text.
6. Enter Note Text.
7. Click the SAVE button.
8. A confirmation page will be displayed allowing the user to view the note.
9. Click the BACK button to return to the Claims Details.

Viewing student Notes

Once a student note has been added to the application, it is viewable by authorized users. The authorization to add and view notes is determined by the system administrator. To view a note, users should perform the following:

1. Click the **Claiming Process** link on the *Menu*.
2. The Claiming Process page will display a list of claims.
3. Click the Details button.
4. If notes have been added, a VIEW NOTE link will be displayed at the top of the page next to the ADD NOTE link.

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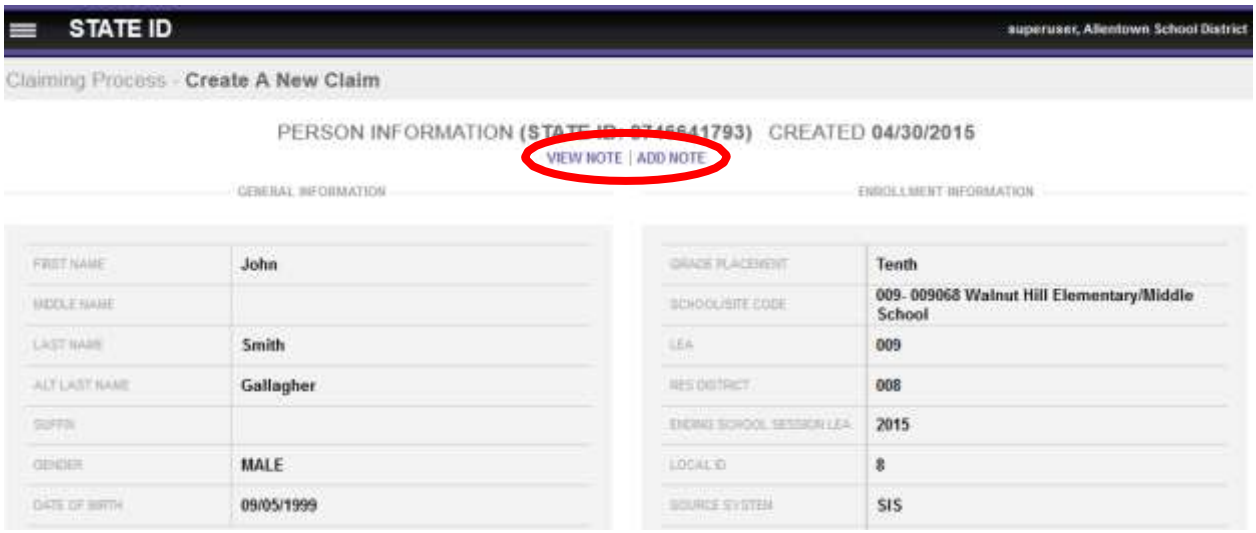

5. Click the VIEW NOTE link to view the notes.
6. A new window will open displaying the available notes for the student. The application will provide information on the user ID, creation date, the text of the note and the note type.

***NOTE**: The application contains Administrator and General Notes. Administrator Notes are visible only to administrators while General Notes are viewable by anyone with authorization to view General Notes.*

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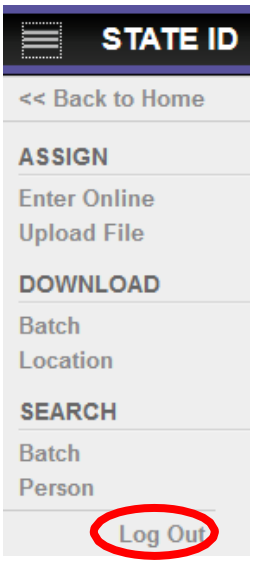
LOG OUT

About Log Out

The **Log Out** link on the *Main Menu* allows users to log off of the application. Once the **Log Out** link is clicked, the application will close the user session and would require the user to login to re-access the application. This link should be clicked every time the user wants to log off of the application. If the Log Out link is not clicked, the application will also automatically exit the application after inactivity in the browser. This is enforced for security purposes.



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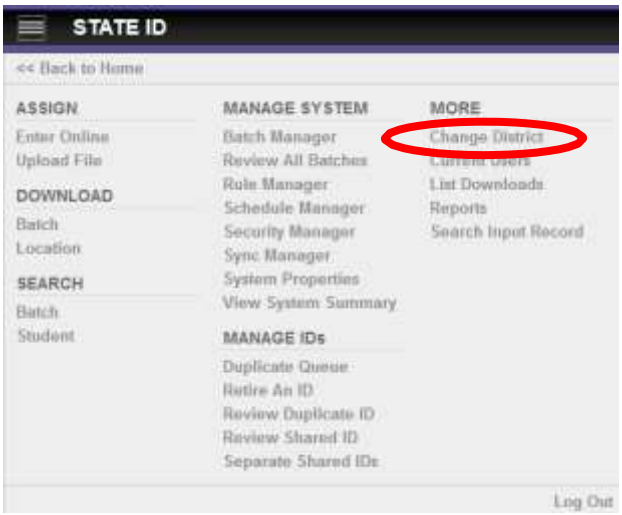
CHANGE DISTRICTS

About Change District



Users can change their current location by clicking the **Change District** link under **MORE** in the *Admin Menu*:

This feature allows users to:

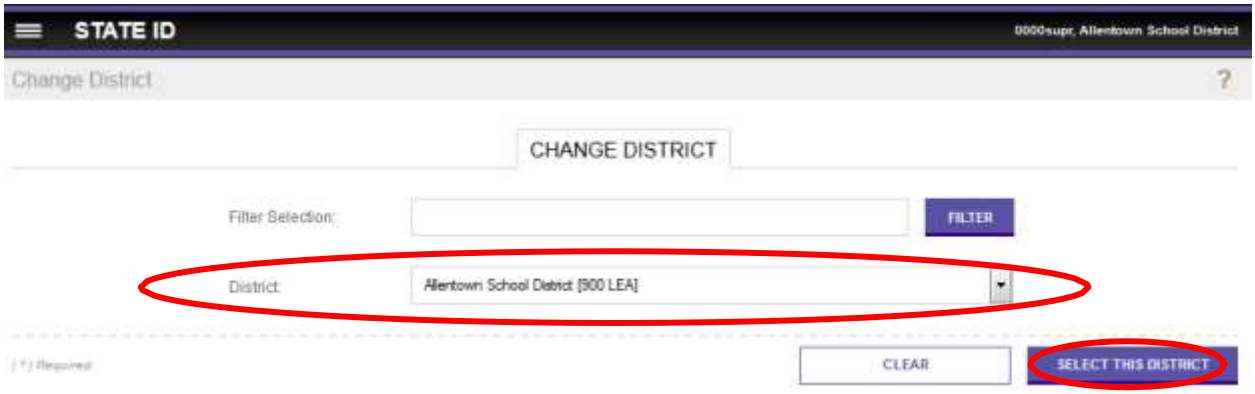
- Change a district selection; allowing users with access to multiple agencies to change the current district reference.
- Search for a district.

This component is enabled / disabled per role within the Admin Components section in Security Manager. It is typically available to the Multi District and Multiple District with Specific School user roles who are authorized to change districts.

Changing a District Selection

Steps

The application requires users to work with only one district at a time. A user's Current Location determines the district he/she can work with. For those users who have access to two or more districts, the Change District module allows them to switch between districts for uploads/person entry. To change districts, users should perform the following steps:



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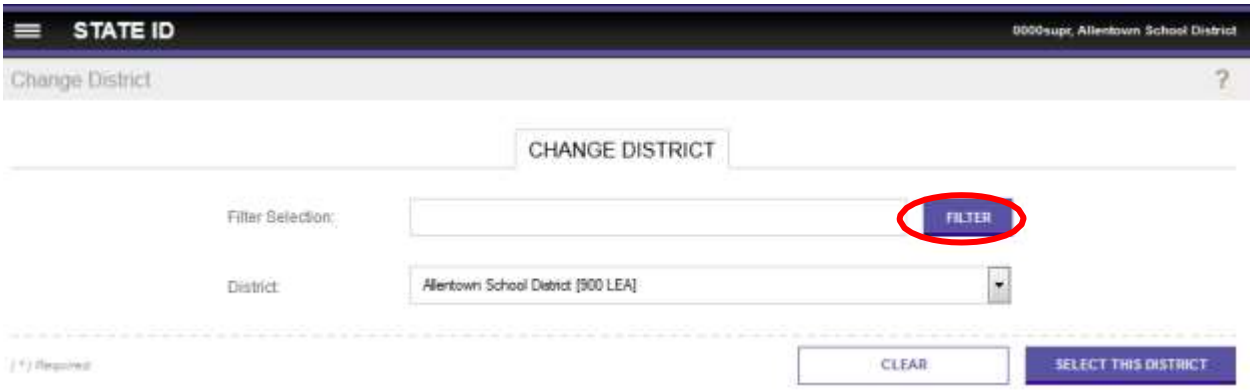
1. Select a district from the **District** dropdown list to change the current district.
2. Click the SELECT THIS DISTRICT button.

Searching for a District

Steps

To search for a district within the Change District component, users should perform the following steps:



1. Enter the district name or the district code in the **Search** textbox on the **Change District** component page. Partial district names or codes can be used for right truncation searches.

   For example, searching for **Allen** returns all districts names or codes that *begin* with **Allen**.

2. Click the FILTER button.
3. The application will display a page listing all of the districts that match the search criteria.

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NEAR MATCH NOTIFICATIONS

The eUID application allows System Administrators to configure and schedule near match notifications at the school and district level. Email notifications will be sent to the school and/or district designee based upon the schedule defined by the System Administrator. The school/district designee is stored in the application along with other school and district information.

When the designated student receives a Near Match Notification, the email will include instructions/details about the pending near match process and will also attach a report summarizing the pending near matches. Any time there is a count greater than 0 of pending near matches, the designated student will receive a notification. It is important, therefore, to resolve pending near matches as described above. People receiving these near match notifications may need to adjust their mail filtering options to receive the emails.

AUTOMATIC FILE PROCESSING (AFP)

When files are submitted via AFP, users will have an opportunity to review and resolve pending near matches and other tasks based upon permissions. Please refer to the appropriate sections throughout this guide for resolving near matches, data validation issues and other details as needed.

Revision History:

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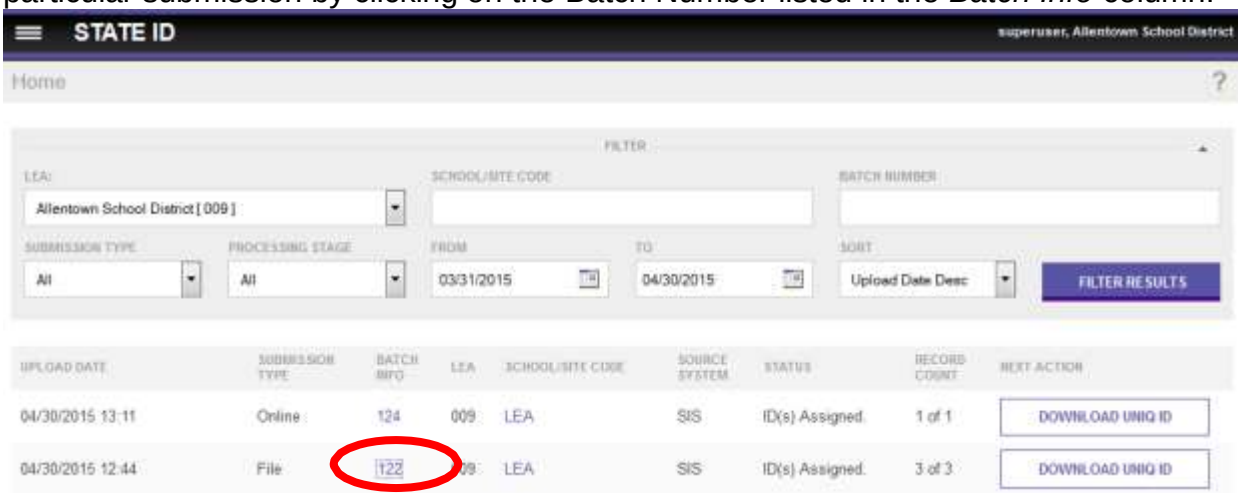
APPENDIX A – BATCH INFO WINDOW

Throughout the eUID application, users can view detailed information about a particular submission by clicking on the Batch Number listed in the *Batch Info* column:



The **Batch Info window** that pops up contains four sections/tabs: (1) Batch Statistics (2) Processing Info (3) Download Info (4) General Info

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Batch Statistics Tab

The *Batch Statistics* tab will display where each record in a submission is within the ID Assignment Process or a Batch Search:

Batch Information: **Batch 122**

STATISTICS | PROCESSING | DOWNLOADS | GENERAL

ID ASSIGNMENT COMPLETE

New ID Assigned During Match Resolution Stage	2
Person Found and History Created During Assign ID Stage	1

CLOSE WINDOW

Records will be grouped by status and ID Assignment stage. Please see Appendix D on page 137 for a list of all statuses and their groupings.

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Processing Info Tab

The Processing Info tab will display a timeline of each step in the ID Assignment Process or a Batch Search:

Batch Information: **Batch 122**

STATISTICS | PROCESSING | DOWNLOADS | GENERAL

PROCESSING STAGE	DATE
Validation Started	04/30/2015 12:44:25 PM
Upload Completed	04/30/2015 12:44:25 PM
Validation Completed	04/30/2015 12:44:26 PM
Assignment Started	04/30/2015 12:44:31 PM
Assignment Completed	04/30/2015 12:44:31 PM
Resolve Near Match Started	04/30/2015 12:50:53 PM
Resolve Near Match Completed	04/30/2015 01:19:08 PM

CLOSE WINDOW

Each step except for the Upload step will contain a start date/time and an end date/time.

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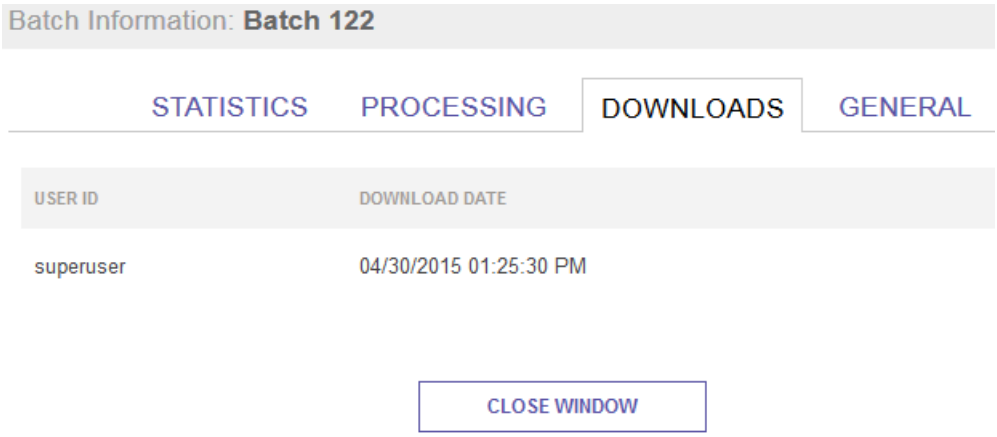
Download Info Tab

The Download Info tab will display information about who downloaded the IDs for the submission and when the download occurred. Each time someone downloads IDs for a particular batch, a new entry will appear in the list:



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General Info Tab

The General Info tab will display basic information about a submission:

Batch Information: **Batch 122**

STATISTICS | PROCESSING | DOWNLOADS | GENERAL

Batch Number	122
Submission Type	File
Batch Status	ID CREATION COMPLETE
LEA	009
School/Site Code	LEA
Extract Date	03/10/2004
Extract File	009valid3.txt
Transmission ID	N/A
Creation User ID	superuser
Creation Date	04/30/2015
Total Records	3
Record Delimiter	,
Header Delimiter	0x09
File Version	2.1
Source System	SIS

CLOSE WINDOW

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APPENDIX B – BATCH RECORD STATUSES

Below is a list of all possible statuses that an individual record can have. A record status indicates exactly where in the ID Assignment or Batch Search process a particular record is. Included in the list are the **Status Title**, a **Description**, and what the **Grouping** for the particular record is. The actual **Status Titles** can be found in the application whenever a user clicks the Batch Info link in the **Batch Info** column.

Status Message (used in output file)
Canceled During Fix Errors Stage
New ID Assigned - No Matching Record Found
Ready to Resolve Near Matches/Duplicates
New ID Assigned During Match Resolution Stage
Person Found and History Created During Match Resolution Stage
Canceled During Match Resolution Stage
Person Found and History Created - Exact Match
Person Found but No Change in Data - Exact Match
Canceled During Data Validation Stage - ID Contained in Record Not Found in System
Canceled During Data Validation Stage
Canceled During Assign ID Stage
Person Found During Assign ID Stage but History Not Created
Person Found During Match Resolution Stage but History Not Created
Person Found and History Created During Assign ID Stage
Existing ID Assigned During Match Resolution Stage - No Exact Match
New ID Created During Match Resolution Stage - No Exact Match

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APPENDIX C – CANCELED RECORDS ERROR MESSAGES

Canceled Record Comments

When a record cancellation occurs, the application will include the reason for cancellation in the Record Comments field in the output file. If a required field is not submitted, the application will return the field name and "is not present" in the Record Comments. If a field does not match the field specifications such as length, data type, or valid values, the application will return the field name and "is not valid()". The invalid value is provided in the parenthesis. Examples of Canceled Record Comments are as follows:

Canceled Record Comments
Alternate ID is invalid at validation.
Date Of Birth is not present.
Date Of Birth is not valid.(XXXinvalid valueXXX)
District Code is not present.
District Code is not valid.(XXXinvalid valueXXX)
First Name is not present
First Name is not valid.(XXXinvalid valueXXX)
Gender is not present.
Gender is not valid.(XXXinvalid valueXXX)
Grade Level is not present.
Grade Level is not valid.(XXXinvalid valueXXX)
Last Name is not present.
Last Name is not valid.(XXXinvalid valueXXX)
Local student ID is not present.
Local student ID is not valid.(XXXinvalid valueXXX)
Middle Name is not valid.(XXXinvalid valueXXX)
Name Suffix is not valid.(XXXinvalid valueXXX)
Race/Ethnic Code is not present.
Race/Ethnic Code is not valid.(XXXinvalid valueXXX)
Residential District is not valid.(XXXinvalid valueXXX)
School Code is not present.
School Code is not valid for the specified district.(XXXinvalid valueXXX)
School Year is not present.
School Year is not valid.(XXXinvalid valueXXX)
SSN is not present.
SSN is not valid.(XXXinvalid valueXXX)
User is not authorized to submit student for the specified district.(XXXinvalid valueXXX)
Record Type is not present.

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Canceled Record Comments
Record Type is not valid.(XXXinvalid valueXXX)
Data not valid in a customer defined field.
Alternate Last Name is not valid.(XXXinvalid valueXXX)
Alternate Last Name is not present.
Data not present in a required customer defined field.
Alternate source is not present.
Alternate ID is not present.

(XXXinvalid valueXXX) = the actual invalid value. For example, School Year is not valid(2A09)

* The exception to this rule is if the field includes the word “Current”. The message will not include “Current” in the message.

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APPENDIX D – BATCH SEARCH FILE FORMAT V3.0

Batch Search uses the same file format/structure as the File Format for ID assignment processing, but offers less restrictive options on required fields. Since the data submitted in the Batch Search file is used to identify matches, it is important to include as much detail as possible. Although date of birth and gender are not required, the data should be submitted when available to produce the most reliable results. Batch File Format v3.0 is the current format being used.

#	Field Name	Required	System - Data type	Used for Matching	Notes/FormatDetails
10	**Grade Placement**	Yes	Char(2)	No	State-defined Grade Level Code **as defined in the SIS User Guide.** 24 – PreK 25 – Kindergarten 01 – Grade 1 02 – Grade 2 03 – Grade 3 04 – Grade 4 05 – Grade 5 06 – Grade 6 07 – Grade 7 08 – Grade 8 09 – Grade 9 T9 – Transitional 9th 10 – Grade 10 11 – Grade 11 12 – Grade 12 15 – SPED Infants (Ages Birth – 2) – or- Nonpublic PK1 or PK2 20 – SPED Preschool (Ages 3-5) –or- Nonpublic PK3
11	**Student Local ID Number**	Yes	VarChar(20)	No	ID used in the local school/site/submitting system to uniquely identify the student. **This field should NOT be used for Social Security Number.**
12	**Social Security Number**	No	Char(9)	Yes	SSN is not required for matching but will be used if it is supplied. If an SSN is invalid or unknown, it should be left blank. **SSN is required if parental consent is Y.**

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13	**Race/Ethnicity**	Yes	Char(6)	No	The Race/Ethnicity codes represent the Hispanic Indicator and 5 race codes. The position of the Hispanic Indicator and 5 race codes are fixed. For each position, indicate N=No and Y=Yes as follows: • 1st Position: HI7 - Hispanic Indicator • 2nd Position: AM7 - American Indian or Alaskan Native Indicator • 3rd Position: AS7- Asian Indicator • 4th Position: BL7 - Black Indicator • 5th Position: PI7 - Native Hawaiian or Other Pacific Islander indicator • 6th Position: WH7 - White Indicator
14	**State ID/Unique ID**	No	Char(10)	No	This is the Louisiana Secure ID (LASID) assigned to the student. This value should be null if the student has not yet been assigned a LASID in the eScholar Secure ID system. Once a LASID has been assigned,all subsequent submissions for that student should include this value. **For Direct Match:** This value should be null
15	**LEA Code**	Yes	Char(3)	No	LEA / Sponsor code assigned by LDOE
16	**Ending School Session Year**	Yes	Char(4)	No	Must be in the 'YYYY' format. School year calendar runs from 7/1 to 6/30. Any date
17	**Alternate Last Name**	No	VarChar(60)	Yes/No	This field should be used for the birth surname, alternate last name, or former last
18	**Multipurposed for 3.0** **Alternate ID** **For Uniq-ID 3.0**	No	VarChar(50)	No	For Uniq-ID: ID used in the system defined in the Alternate Source field. If Alternate Source is provided, this field is required.
	Recipient Index ID **For Direct Match 3.0**				For Direct Match: Any values on input will be rejected. SNAP Recipient ID of the SNAP
19	**Multipurposed for 3.0** **Alternate Source For Uniq-ID 3.0**	No	VarChar(60)	No	For Uniq-ID: Source Name for the Alternate ID field. Can be used to track additional local identifiers. If Alternate ID is required, this field is required.
	Match to Type **For Direct Match 3.0**				For Direct Match: Any values on input will be rejected. Match Type of the SNAP Match to Record = "SNAP"
20	**RESERVED** **in 2.1 was: Street Address**	No	VarChar(25)	No	Not Used by LDOE. Leave this field blank.
21	**RESERVED** **in 2.1 was: City**	No	VarChar(25)	No	Not Used by LDOE. Leave this field blank.

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22	**RESERVED** **in 2.1 was: State**	No	VarChar(25)	No	Not Used by LDOE. Leave this field blank.
23	**RESERVED** **in 2.1 was: Zip Code**	No	VarChar(25)	No	Not Used by LDOE. Leave this field blank.
24	**RESERVED** **in 2.1 was: Parental**	No	VarChar(25)	No	Not Used by LDOE. Leave this field blank.
25	**RESERVED**	No	VarChar(25)	No	Not Used by LDOE. Leave this field blank.
26	**RESERVED**	No	VarChar(25)	No	Not Used by LDOE. Leave this field blank.
27	**RESERVED**	No	VarChar(25)	No	Not Used by LDOE. Leave this field blank.
28	**RESERVED**	No	Date	No	Not Used by LDOE. Leave this field blank
29	**RESERVED**	No	Numeric(25)	No	Not Used by LDOE. Leave this field blank
30	**Parental Consent Flag**	No	Varchar(25)	No	For Uniq-ID: Each position will define the consent flag. Position 1 = LOFSA.

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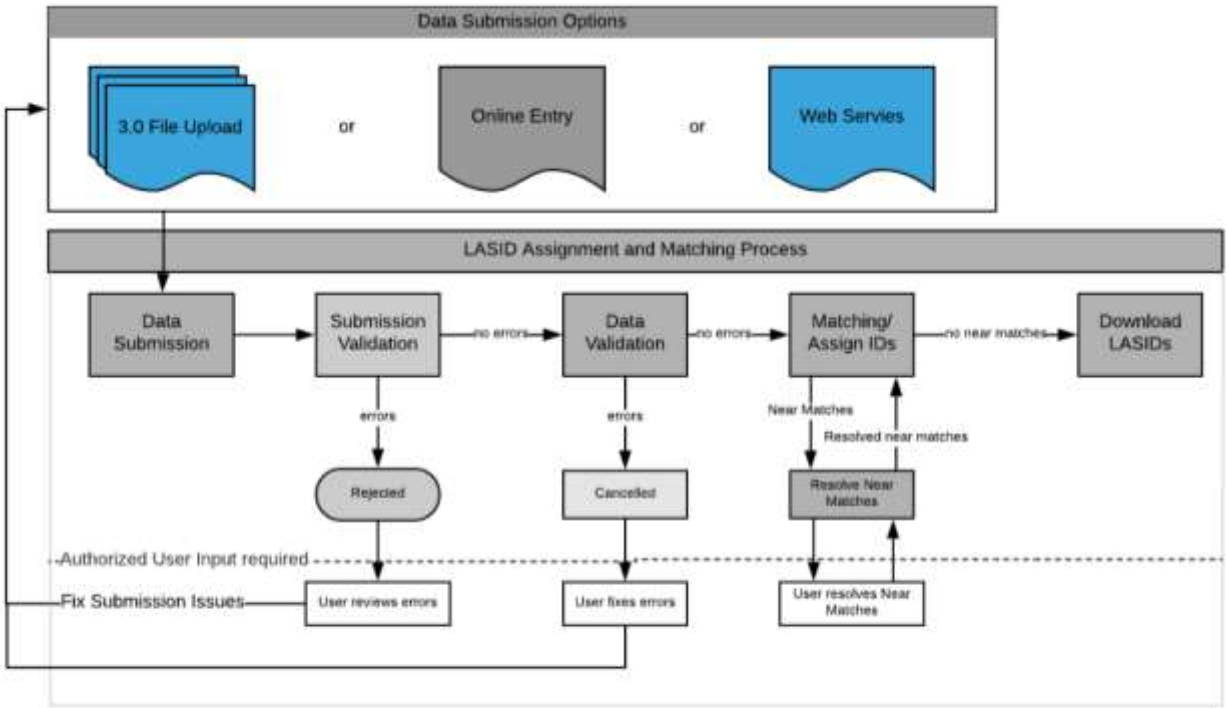
#	Field Name	Required	System - Data type	Used for Matching	Notes/FormatDetails
31	**RESERVED**	No	VarChar(4)	No	Not Used by LDOE. Leave this field blank
32	**RESERVED**	No	VarChar(10)	No	Not Used by LDOE. Leave this field blank
33	**RESERVED**	No	VarChar(10)	No	Not Used by LDOE. Leave this field blank
34	**RESERVED**	No	VarChar(10)	No	Not Used by LDOE. Leave this field blank
35	**RESERVED**	No	VarChar(10)	No	Not Used by LDOE. Leave this field blank
36	**RESERVED**	No	VarChar(10)	No	Not Used by LDOE. Leave this field blank
37	**RESERVED**	No	Varchar(60)	No	Not Used by LDOE. Leave this field blank
38	**RESERVED**	No	Varchar(100)	No	Not Used by LDOE. Leave this field blank
39	**RESERVED**	No	VarChar(60)	No	Not Used by LDOE. Leave this field blank
40	**RESERVED**	No	VarChar(50)	No	Not Used by LDOE. Leave this field blank
41	**Street Address (Physical)** Moved placement for 3.0	No	VarChar(50)	Yes	Physical Street Address of the Student
42	**Street Address 2 (Physical)** Moved placement for 3.0	No	VarChar(30)	Yes	Physical Address 2 (e.g. Apartment #)
43	**City (Physical)** Moved placement for 3.0	No	VarChar(30)	Yes	Physical City Address of the Student
44	**State (Physical)** Moved placement for 3.0	No	Char(2)	Yes	2 Letter Abbreviation code of the State Where the Student lives. Example: LA – Louisiana For Nonpublic addresses: MS-Mississippi TX-Texas, AR-Arkansas, GA-Georgia, AP-Military Base, AE-Military Base
45	**Zip Code (Physical)** Moved placement for 3.0	No	Char(9)	Yes	Physical Zip Code of the Student's Address 5 digits - or - 9 digits (last 4 cannot be all zeroes) **For Direct Match:** 5 digits ONLY
46	**RESERVED**	No	VarChar(22)	No	Not Used by LDOE. Leave Blank
47	**RESERVED**	No	VarChar(20)	No	Not Used by LDOE. Leave Blank
48	**RESERVED**	No	datetime	No	Not Used by LDOE. Leave Blank
49	**RESERVED**	No	VarChar(20)	No	Not Used by LDOE. Leave Blank
50	**RESERVED**	No	VarChar(20)	No	Not Used by LDOE. Leave Blank
51	**RESERVED**	No	VarChar(125)	No	Not Used by LDOE. Leave Blank
52	**RESERVED**	No	VarChar(25)	No	Not Used by LDOE. Leave Blank
53	**RESERVED**	No	VarChar(20)	No	Not Used by LDOE. Leave Blank
54	**RESERVED**	No	VarChar(2)	No	Not Used by LDOE. Leave Blank

#	Field Name	Required	System - Data type	Used for Matching	Notes/FormatDetails
55	**Submission Purpose** New for 3.0	Yes	Char(3)	No	This field should always include code 001 on all submissions.
56	**Person Type** New for 3.0	Yes	Char(2)	No	The current student type of the individual. 02 – Student
57	**Location Active Flag** Not used by Nonpublics	YES	VarChar(1)	No	The current status of the student 0 – Inactive 1 – Active
58	**RESERVED**	No	VarChar(100)	No	Not Used by LDOE. Leave Blank
59	**RESERVED**	No	date	No	Not Used by LDOE. Leave Blank
60	**RESERVED**	No	Varchar(2)	No	Not Used by LDOE. Leave Blank
61	**RESERVED**	No	VarChar(100)	No	Not Used by LDOE. Leave Blank
62	**RESERVED**	No	Varchar(1)	No	Not Used by LDOE. Leave Blank
63	**RESERVED**	No	datetime	No	Not Used by LDOE. Leave Blank
64	**RESERVED**	No	Numeric (10.2)	No	Not Used by LDOE. Leave Blank
65	**RESERVED**	No	Varchar(25)	No	Not Used by LDOE. Leave Blank
66	**RESERVED**	No	Varchar(100)	No	Not Used by LDOE. Leave Blank
67	**RESERVED**	No	VarChar(100)	No	Not Used by LDOE. Leave Blank
68	**RESERVED**	No	VarChar(100)	No	Not Used by LDOE. Leave Blank
69	**RESERVED**	No	VarChar(100)	No	Not Used by LDOE. Leave Blank
70	**Active Location Count** New for 3.0	No	Numeric(4,0)	No	This field is the internal number of current active locations for the ID Record Type and is provided as a number count in the output file. This field should be blank on input. **Any values on input will be ignored.**
71	**RESERVED**	No	datetime	No	Not Used by LDOE. Leave Blank
72	**Match Score** New for 3.0	No	VarChar(3)	No	This field is used to provide the Match Score for records that are a Match or Near Match only. This field should be blank on input. **Any values on input will be ignored.**
73	**ID Record Status** Moved placement for 3.0	No	VarChar(255)	No	This field is the internal transaction status result for the record and is provided in the output file. **Examples:** *"No Match"* *"Match"* *"Match – Selected during Match Resolution stage"* *"Canceled – During data validation stage"* This field should be blank on input. **Any values on input will be ignored.**

#	Field Name	Required	System - Data type	Used for Matching	Notes/FormatDetails
74	**Location Status** New for 3.0	No	VarChar(255)	No	This field is the internal transaction status result for the Location record and is provided in the output file. This field should be blank on input. **Any values on input will be ignored.**
75	**Event Status** New for 3.0	No	VarChar(255)	No	This field is the internal transaction status result for the Enrollment Event record and is provided in the output file. This field should be blank on input. **Any values on input will be ignored.**
76	**Record Reference Number** Moved placement for 3.0	No	VarChar(12)	No	This field is the internal transaction identifier for the record as part of the output file. This field should be blank on input. **Any values on input will be ignored.**
77	**Last Updated User ID**	No	VarChar(50)	No	This field is provided in the output file. This field should be blank on input. **Any values on input will be ignored.**
78	**Record Update Date** Moved placement for 3.0	Yes	VarChar(10)	No	This field is the last update for the record and is provided in the output file. This field should be blank on input. **Any values on input will be ignored.**

eScholar ID Assignment Process Flow Chart



APPENDIX E - Update History

• Active Student Flag Added to Download by Location Report LEAS do not have a way to see all of the students that have active status for their Leas. Currently Leas must look up individual student records. eScholar will add a roster report of active students that will follow DRC rules	• Implementation: August 2019 Version 11.1