User Guide

eScholar Uniq-ID® DirectMatch

Customized with information specific to Louisiana

Version 2.0

2019-2020

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ABOUT eScholar

eScholar is the 3rd party vendor who supports the Louisiana Secure ID System which includes various applications. They include the eScholar Uniq-ID® (eUID) application designed for assignment and maintenance of statewide "unique identifiers" for students and the eScholar Uniq-ID® DirectMatch (eUID DirectMatch) application which identifies students eligible for free lunch.

ABOUT DirectMatch

Purpose

The eScholar Uniq-ID® DirectMatch (eUID DirectMatch) application is designed to quickly and accurately identify students who are directly certified as eligible for free lunch. Eligible students are recipients of benefits through the Supplemental Nutrition Assistance Program (SNAP). Information for students enrolled in Louisiana schools can be matched against the statewide SNAP data/records to determine their eligibility. This identification of eligible students is a requirement of the USDA Food and Nutrition Service (FNS).

Capabilities

The eUID DirectMatch application is designed to:

- **Support multiple agency programs** as defined by the state such as the Supplemental Nutrition Assistance Program (SNAP).
- **Provide multiple ways to submit student submission records** to the DirectMatch application including via batch mode, manual online entry, or by directly sourcing student enrollment data from the eScholar Uniq-ID® (eUID) application.
- **Allow for Matching** of student enrollment data against Supplemental Nutrition Assistance Program (SNAP) recipient data.
  Allow for the Download of files containing DirectMatch decisions.
- **Allow for the Review and Audit of DirectMatch decisions** at any point in time.
- **Allow for correcting DirectMatch decisions** (No Match and Match)

Benefits

The DirectMatch 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**
- **An easy-to-use interface** for all functionality within the application.
- **An organized and structured approach for** Direct Certification reporting.
- **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.

ABOUT THIS GUIDE

This guide is designed as a reference for the eScholar Uniq-ID® DirectMatch application. It includes descriptions of components, step-by-step instructions, and screenshots to assist with using the DirectMatch application. The guide also includes detailed information regarding error messages, file formats and other application-specific details. Usually, each major topic will begin on a new page to make it easier to find information in this guide.

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 NOTE and TIP 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 DirectMatch application. The pointing hand always indicates a TIP.

Definitions, Acronyms, and Abbreviations

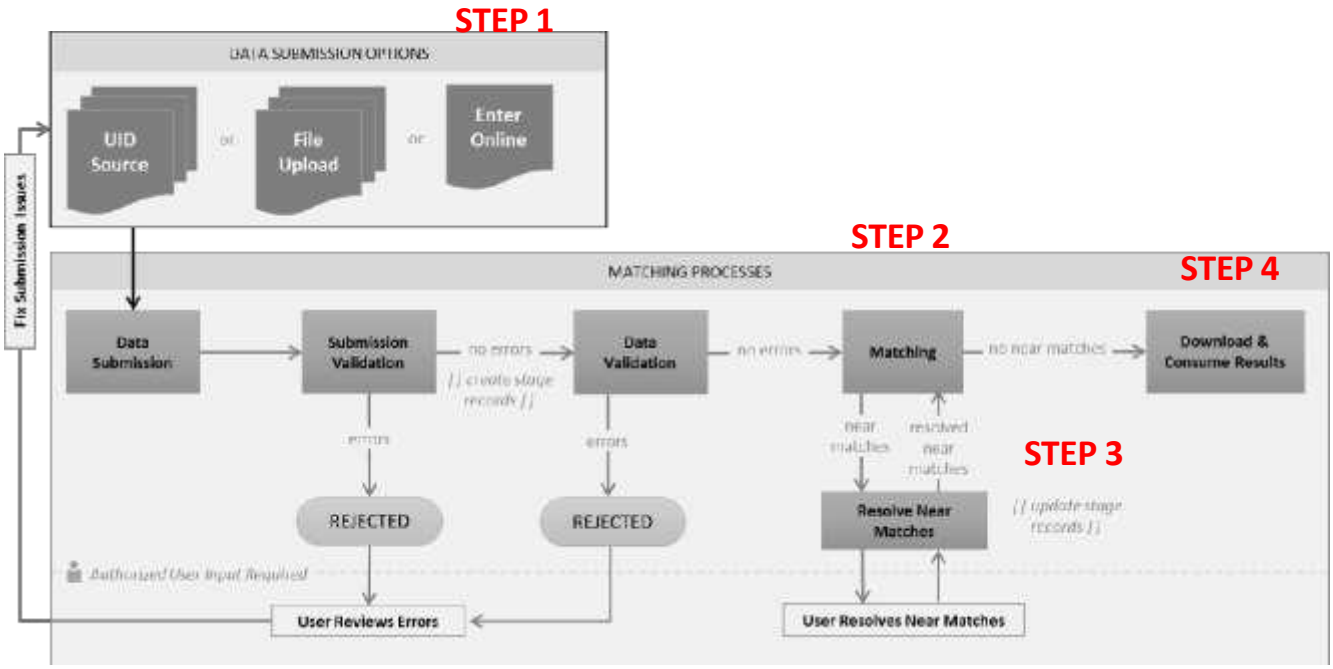
- **eScholar** – The 3rd party vendor supporting the Louisiana Secure ID System applications.
- **eScholar Uniq-ID® (eUID)**– The Louisiana Secure ID application used to assign unique State IDs (LASIDs) to students. **eUID** is the abbreviation used throughout the application.
- **SIS** – LDOE Student Information System, the source system for the student enrollment data.
- **SPS** – LDOE Sponsor Site System for assigning unique codes for school districts and schools.
- **District Code (LEA)** – Assigned by LDOE, this is the 3-digit code assigned by SPS for each Local Education Agency. **LEA** is the abbreviation used throughout the application.
- **School/Site Code** – Assigned by LDOE, this is the 6-digit code assigned by SPS which identifies a school within an LEA.
- **State ID (LASID)** –The unique student identifier generated by the eScholar Uniq-ID® application. **Uniq-ID** or **LASID** is the abbreviation used throughout the application.

- **Local ID** – The unique local student identifier that is created by the Local Education Agency (LEA) for each student.
- **SNAP** – Supplemental Nutrition Assistance Program for eligible students who are directly certified for free lunch. **SNAP** is the abbreviation used throughout the application.
- **Recipient ID** – This refers to the student receiving SNAP benefits and is used to link a match decision between a student enrollment recordand a SNAP recipient record.
- **DirectMatch** – The Louisiana Secure ID system application used to determine matches between a student enrollment record and a SNAP recipient record.
- **Match Probability:** The probability that two student records are the same person.
- **Match** – This button is available within the Near Match pages and is used to identify a match between a student enrollment record and a SNAP recipient record.
- **No Match** - This button is available within the Near Match pages and is used to identify non-match between a student enrollment record and any SNAP recipient records.
- **Master Data** – This is the active record for the student and includes the LASID 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 by the System Administrator.
- **Uniq-ID Source** – The DirectMatch application allows for the sourcing of student enrollment data from eUID to match against SNAP recipient records without the need of the State or an LEA to resubmit the student enrollment data to the DirectMatch application.
- **Batch** – Any type of student data submission to the eScholar applications (UID and DirectMatch)
- **File Format 3.0** – One of the extract template options for downloading DirectMatch Match and No Match decisions.
- **File Format 3.0+** – One of the extract template options for downloading DirectMatch Match and No Match decisions.
- **DM Index** – One of the extract template options for downloading DirectMatch Match and No Match decisions

DirectMatch APPLICATION OVERVIEW

The DirectMatch 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 AND VALIDATE SUBMISSION**
- **STEP 2:** **MATCH RECORDS**
- **STEP 3:** **RESOLVE NEAR MATCHES**
- **STEP 4:** **DOWNLOAD RESULTS**



NOTE: With exclude previous match feature turned on only records that have not been previously matched will be sourced in from UID, batch upload and enter online.

DirectMatch Data Collection Timeline

<table>
<tr><th>Jul</th><th>Aug</th><th>Sep</th><th>Oct</th><th>Nov</th><th>Dec</th><th>Jan</th><th>Feb</th><th>Mar</th><th>Apr</th><th>May</th><th>Jun</th><th>Jul</th></tr>
<tr><td></td><td colspan="10">Monthly DirectMatch Run</td><td></td><td></td></tr>
<tr><td></td><td colspan="7">CEP Monthly Data Collection</td><td>CEP Report Due</td><td colspan="3">CEP Election</td><td>CEP Confir-mation</td></tr>
<tr><td colspan="3">eScholar Begins</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td colspan="3">October 1</td><td></td><td></td><td colspan="2">February 1 MFP</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td colspan="5">End-Of-Year</td></tr>
</table>

Monthly DirectMatch Run: When notice of June file is loaded to DirectMatch LEA's must run DirectMatch in eScholar. LEA's are responsible for doing their matches monthly and downloading the data to their Food Services and/or local systems.

CEP: Monthly data Reporting Summary period is from Aug- March 31. However, DirectMatch should still be completed every month. Between June 1 and June 30, SFA MUST confirm CEP elections for the next SY. If this step is not completed, the SFA will NOT be able to elect or re-establish CEP for the next SY. CEP steps are as follows:

STEP 1: Submit Population Data August- March 31

STEP 2: Submit CEP Worksheet *June 1- June 30*

STEP 3: Confirm CEP Elections July 1st

Memos are sent every month that will provide guidance to SFAs on the completion of steps for CEP data reporting and election on the CNP website.

October 1 MFP (PROCESSING PERIOD 1): For this beginning of school year data collection, free/reduced lunch data **as of October 1** are reported.

October 1 CLASS (PROCESSING PERIOD 2): The same data as reported for October 1 MFP. Submit lunch status.

February 1 MFP (PROCESSING PERIOD 3): The collection of free/reduced lunch data as of Feb 1 are reported.

End-Of-Year (PROCESSING PERIOD 9**):** For the EOY free/reduced lunch data for any student enrolled at any during the entire school year are reported and become final.

LOGGING IN

About DirectMatch Access

In order to access any of the Louisiana Secure ID system applications, a valid User ID and password are required. Each User ID is assigned to a specific role which defines what application(s) a user is authorized to access and what features within the application a user is authorized to perform. For the DirectMatch application, a user may have combinations of the following:

- DirectMatch access at the LEA Code level
- DirectMatch access at the School Code level
- eUID and DirectMatch access

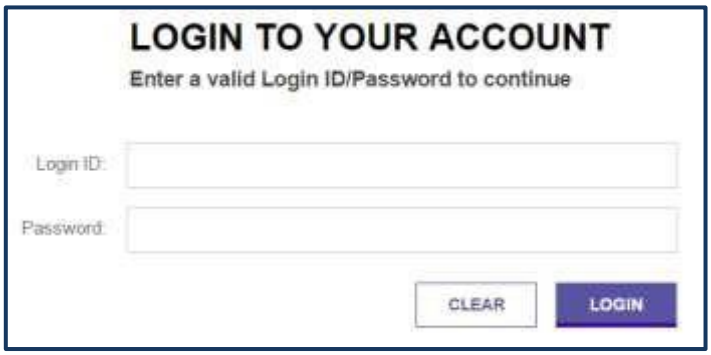
Users should contact their LEA Security Coordinator to request access to the DirectMatch application. Upon authorization by the LEA Security Coordinator, users will be provided a User ID and initial password which must be changed prior to their initial login. After the initial login, users needing assistance with passwords, should email louisianasecureid@escholar.com.

About Logging into DirectMatch

When logging into the eScholar, users should access the login URL https://louisianasecureid.escholar.com/uid/login.do and enter valid login information.

Steps to login to the application:

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. LDOE Main Portal). In such a situation, users must select the eUID application from a list of applications in order to be logged into the application.

MAIN MENU OF THE DirectMatch APPLICATION

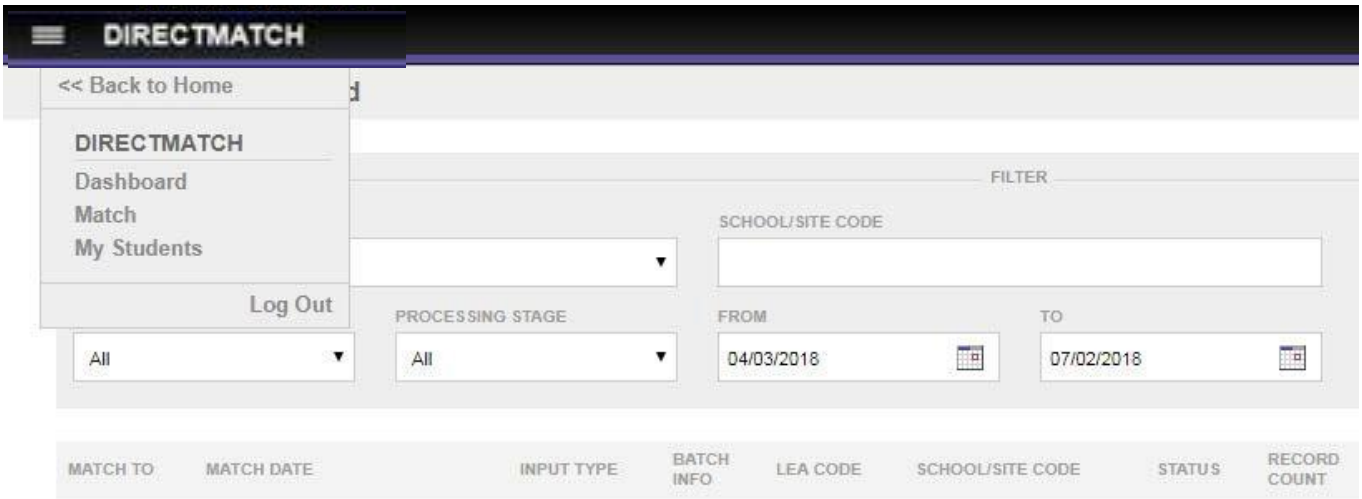
Home Page

Once a user successfully logs into the eUID application, the eUID **Home Page** or the DirectMatch

Dashboard will be displayed depending on their user role.

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

The Main Menu contains links that allow users to access the DirectMatch application along with eUID application features including uploading student batch files, entering individual student data online, performing student searches, performing batch searches, downloading various types of output files, and exiting the application. These menu options are based on system roles and assigned privileges and some of the menu items may not be available for all users.



NOTE: Users associated to the DirectMatch role only will not have access to any of the eScholar features. After login they will land in the DirectMatch Dashboard.

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.

FEATURES OF THE DirectMatch APPLICATION

FEATURES

The core features that are included in the DirectMatch application can all be accessed from the Main Menu and are outlined below. For administrative features, please refer to the Administrative Guide:

DASHBOARD

The Dashboard 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 "**Dashboard**" link or by clicking on the BACK TO DASHBOARD button on any page. Refer to the section DIRECT MATCH DASHBOARD for more information.

DATA SUBMISSIONS

The Match component provides users with the ability to initiate the DirectMatch and *Data Validation* processes by sourcing data directly from eUID, uploading a batch file, or submitting an online entry form. It is accessed by clicking on the **Main Menu** icon and the "**Match**" link from any page in the DirectMatch application. Refer to the section STEP 1: SUBMIT AND VALIDATE STUDENTDATA for more information.

MATCHING PROCESS

The Matching Process of DirectMatch is initiated and the scoring phase is executed which matches student submission records against the statewide list of SNAP recipients. Refer to STEP 2: MATCH RECORDS for more information.

RESOLVE NEAR MATCH

The Resolve Near Match component provides users with the ability to resolve near matches directly from the User Interface. It is accessed by clicking on the RESOLVE button from the ***DirectMatch -Dashboard*** page. Refer to STEP 3: RESOLVE NEAR MATCHES for more information.

DOWNLOAD RESULTS

Users can Download DirectMatch results per Batch. It is accessed by clicking on the DOWNLOAD button from the ***DirectMatch- Dashboard*** page or by building the extract in the ***DirectMatch- Download Options*** page accessed from the ***DirectMatch - Dashboard*** page. Refer to the section STEP 4: DOWNLOAD RESULTS for more information.

SEARCH STUDENTS TO VIEW INDIVIDUAL RESULTS

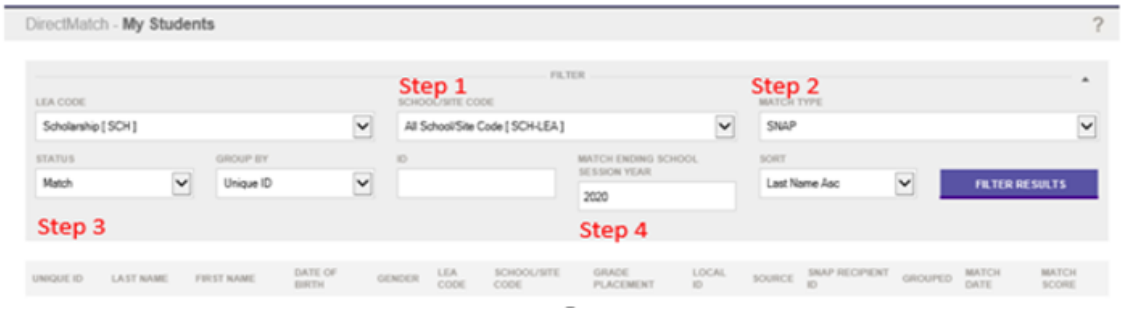
The ***Student Search –Individual Student*** page provides users with the ability to view and edit individual DirectMatch decisions. It is accessed by clicking on the Main Menu icon and the **Student Search** link. Refer to the section SEARCH BY STUDENT for more information.

My Students

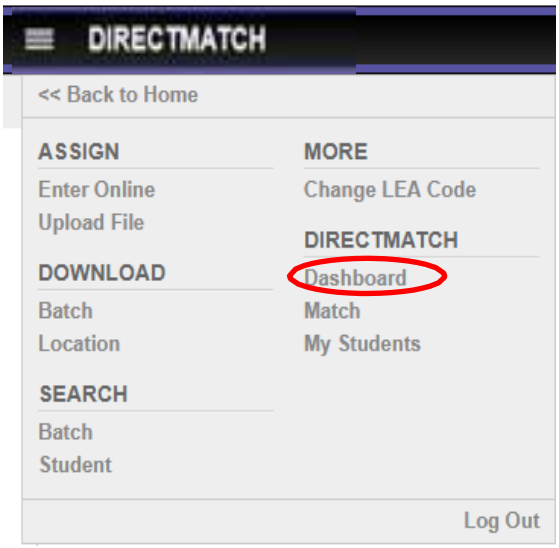
The My Student – All or Individual school page provides users with the ability to view all or in d iv id u al DirectMatch listed under the LEA code. It is accessed by clicking on the Main Menu icon and the My Student link. Refer to the section SEARCH BY STUDENT for more information.

My Students report allows user to get a total count of matched students. It can be filtered by LEA or site code. Once on the My Students page, the following steps can be used to get DirectMatch roster of matched students with totals.

1: Select School/Site
2: Match Type= SNAP
3: Status= Match
4: School Year = 2020



DASHBOARD > DirectMatch

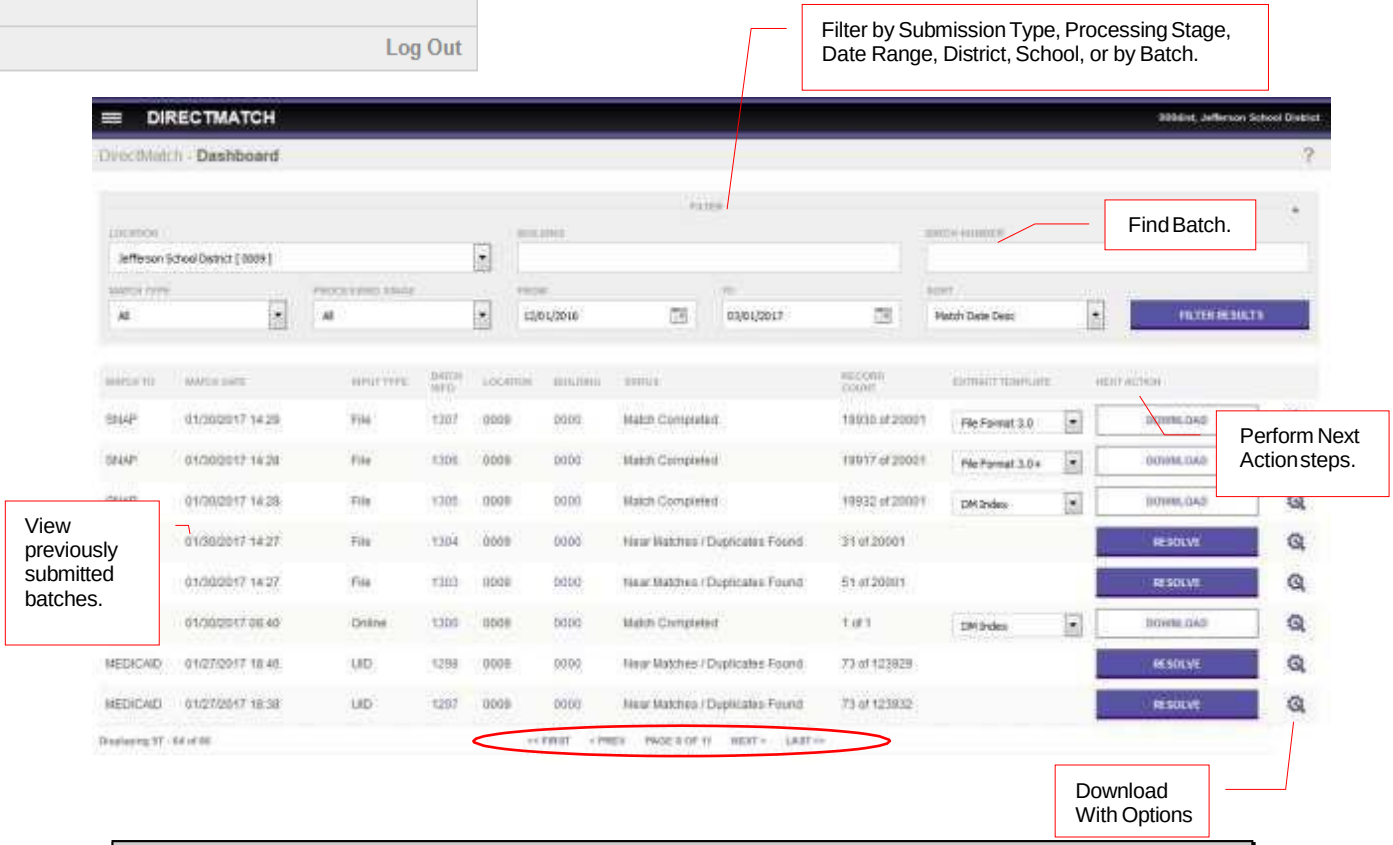


About the Dashboard

Once a user successfully logs into the eUID application, the eUID Home Page or the DirectMatch Dashboard will be displayed depending on their user role.

The Dashboard allows users to:

- View previously submitted batches
- Filter batches
- Find a batch
- Perform Next Action steps
- Access Download Options

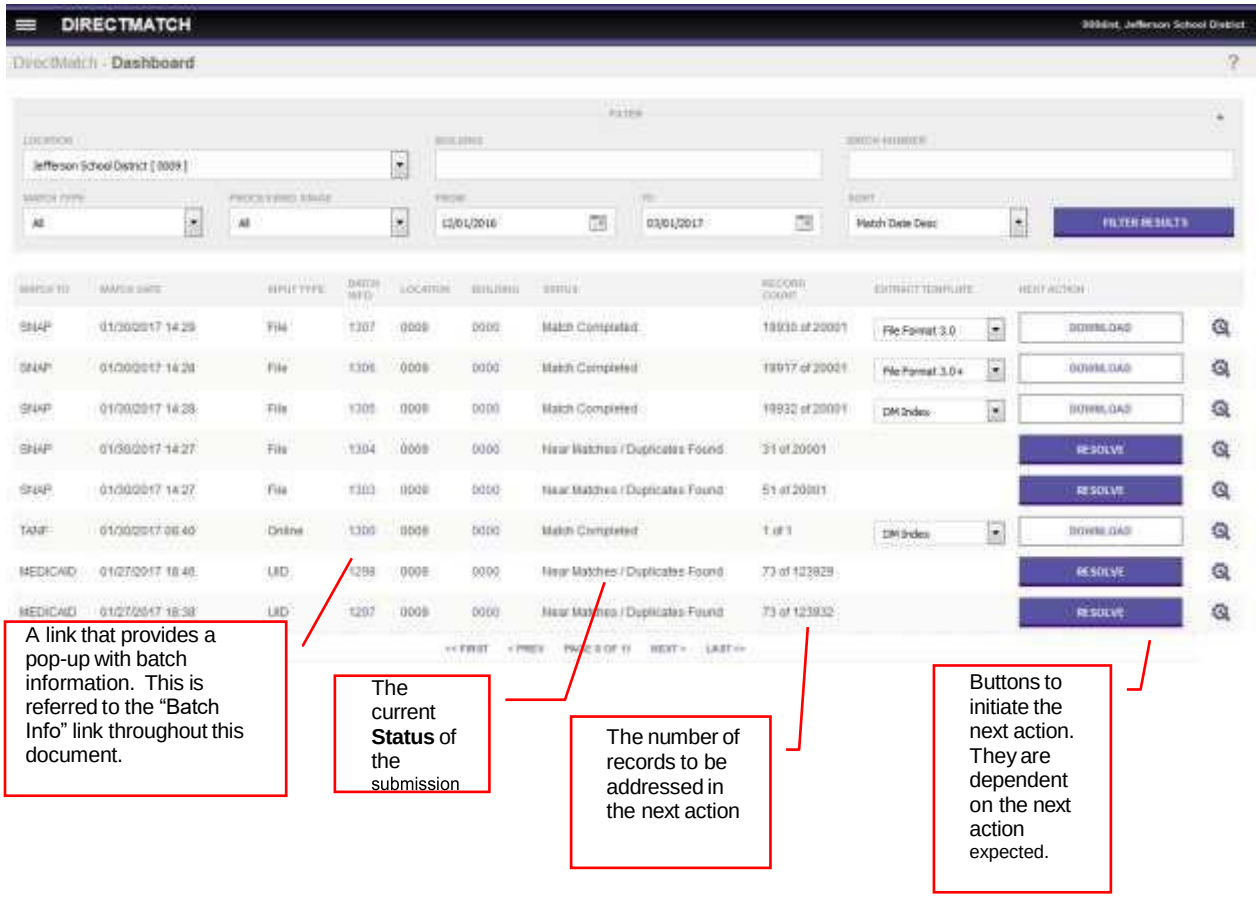


TIP: The DirectMatch application contains many pages which display lists of items. All lists are loaded and may not show all records on one page. Users can navigate to other pages in a list using the **FIRST**, **PREV**, **NEXT**, and **LAST** buttons on the bottom of each list.

Viewing Previously Submitted Batches

The bottom section of the Dashboard provides users with a list of batches (or data submissions) to the DirectMatch application. These will include those batches that have been uploaded via a batch file, entered online, or sourced directly from eUID. The dashboard only displays batches the user has access to for their current LEA. The columns displayed for each batch include: MATCH TO=**"SNAP",** MATCH DATE=*Submission date*, INPUT TYPE, BATCH INFO=*Batch Number*, LEA Code, SCHOOL/SITE CODE, STATUS, RECORD COUNT=*number of records in the batch*, EXTRACT TEMPLATE (for formatting the records in the batch that are ready for download), and NEXT ACTION which allows the user to continue where they left off in the Match process.

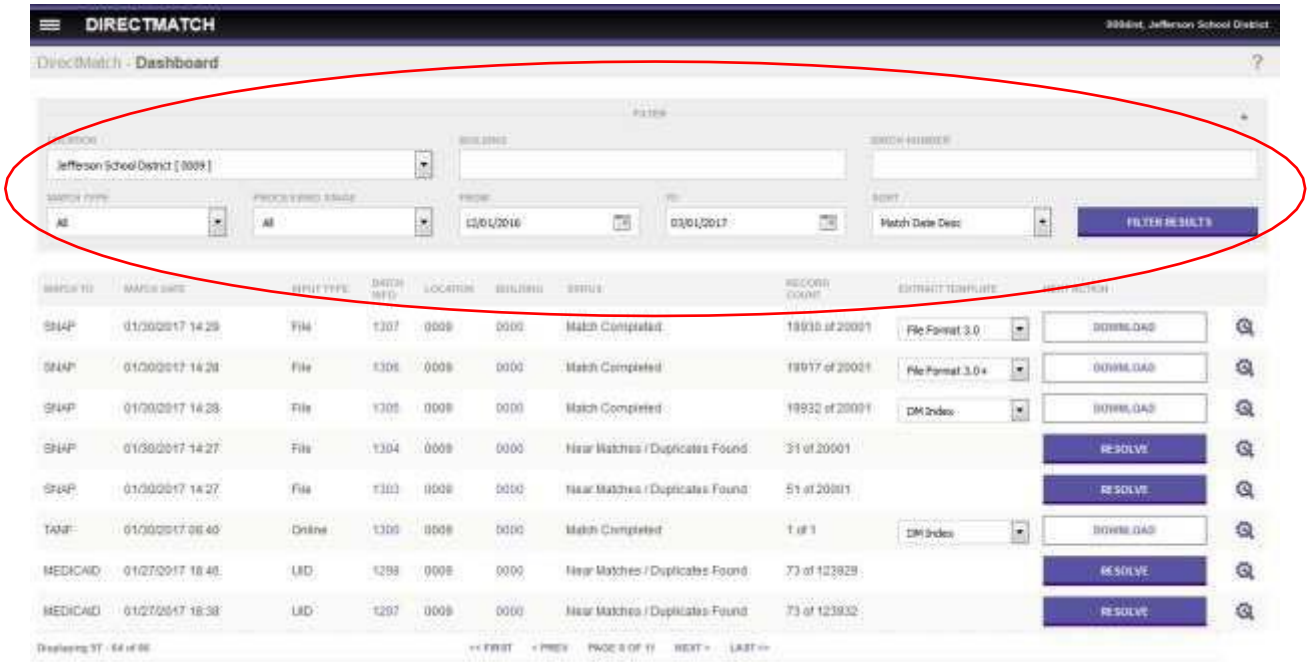
Each action correlates to a step in the Match process. The Options Icon allows the user to access multiple options, through the ***DirectMatch - Download With Options*** page, for the selected Batch.



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. These actions will include Resolve Near Matches and Download.

Filtering Batches

Users have the ability to narrow down the batch list by utilizing the batch filters. The Dashboard includes the following types of filters:



- **LEA Code:** The module will display all of the LEAs that a user has access to so that the page can be filtered by a specific LEA.
- **School/Site Code:** The School for the selected LEA Code can be entered to filter by LEA and School.
- **Batch Number:** Entering a *Batch Number* in the filter allows users to view and work on a specific batch, independent of the other filter options. This *Batch Number* is unique and can be used for finding a batch.
- **Match To Type:** SNAP.
- **Processing Stage:** The options are *All, Validate Data, Ready to Match, Resolve Near Matches, Download Matches, Rejected, Canceled, Validation in Progress, Match in Progress, Continue Validation, and Continue Matching*.
- **Match Date:** Expects valid date ranges.
- **Sort:** Users can sort by Match Date, or Match to Type.

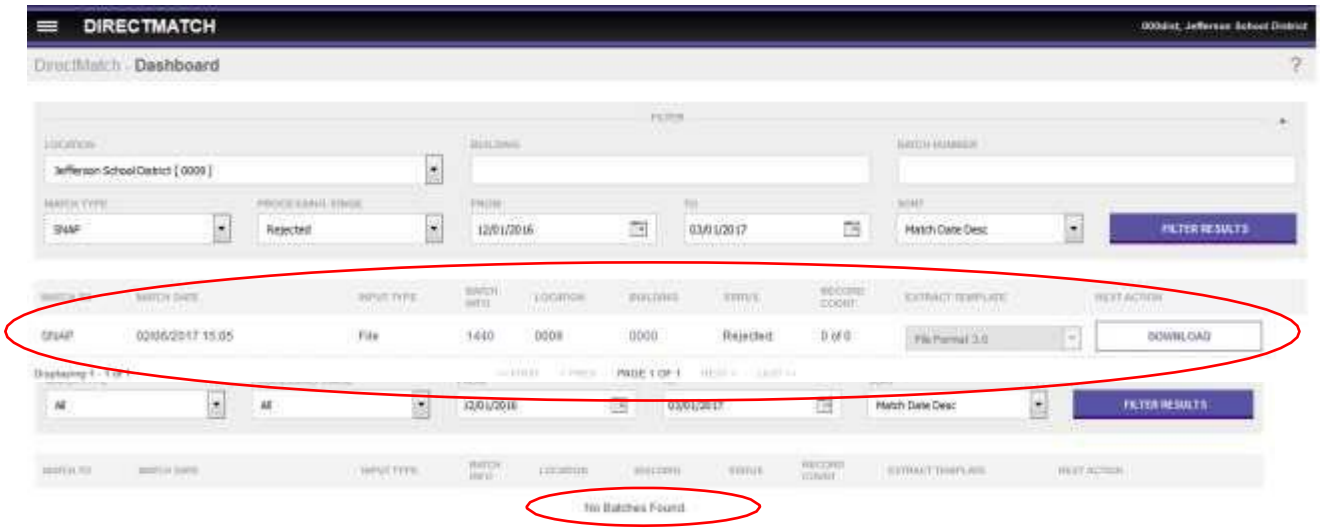
NOTE: Searching for a specific Batch using the Batch Number filter will ignore all other filter options.

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

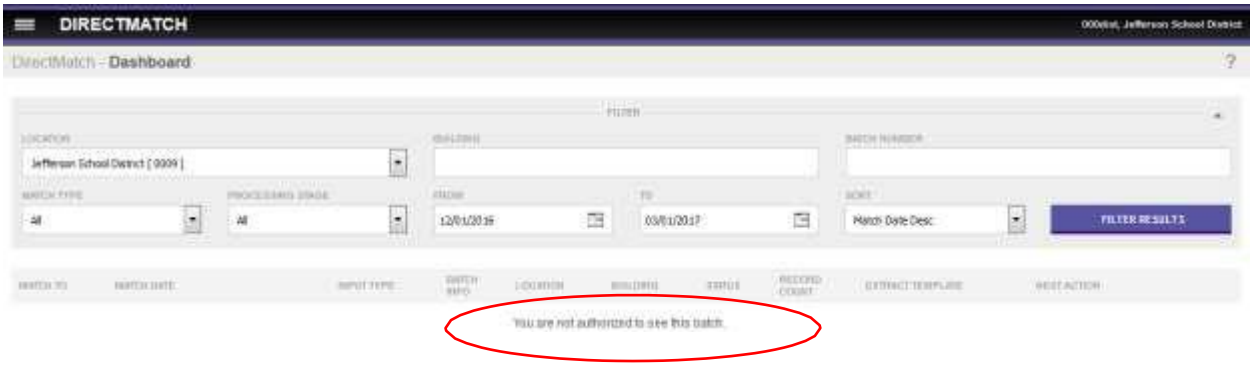
1. Click the dropdown arrow and select the appropriate option for each of the filters.
2. Click the FILTER RESULTS button.
3. The page will refresh and limit the results based on the filters.

Results from Filtering

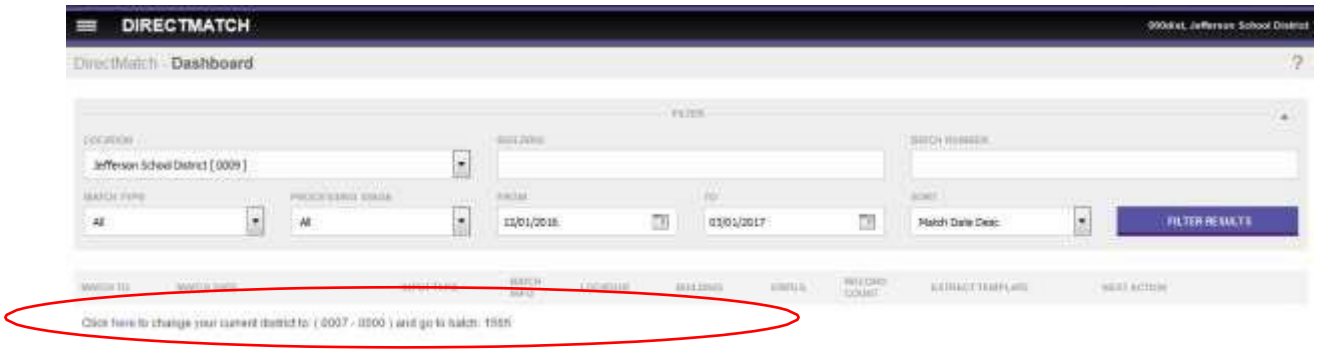
- **Found Batch:** If the application finds a matching batch, the application will display information about the batch.



- **User Not Authorized:** If the user enters a Batch Number and the application finds the user does not have the appropriate rights to view the batch, the application will display a message "You are not authorized to see this batch" to alert the user they are not authorized to view the batch.



- **Multiple LEAs:** For those users who have access to more than one LEA, entering the *Batch Number* to find a specific batch has an additional feature. If the *Batch Number* submitted is for a LEA other than the user's current LEA and the user has access to that other LEA, the application will display a message *"Click here to change your current district to: (LEA Code) and go to batch: (Batch Number)"* alerting the user to change their current LEA setting if they wish to review that particular batch. Users can switch to that other LEA automatically by clicking on the *here* link. Upon doing so, the application will change the user's LEA and also display the batch list for that LEA.

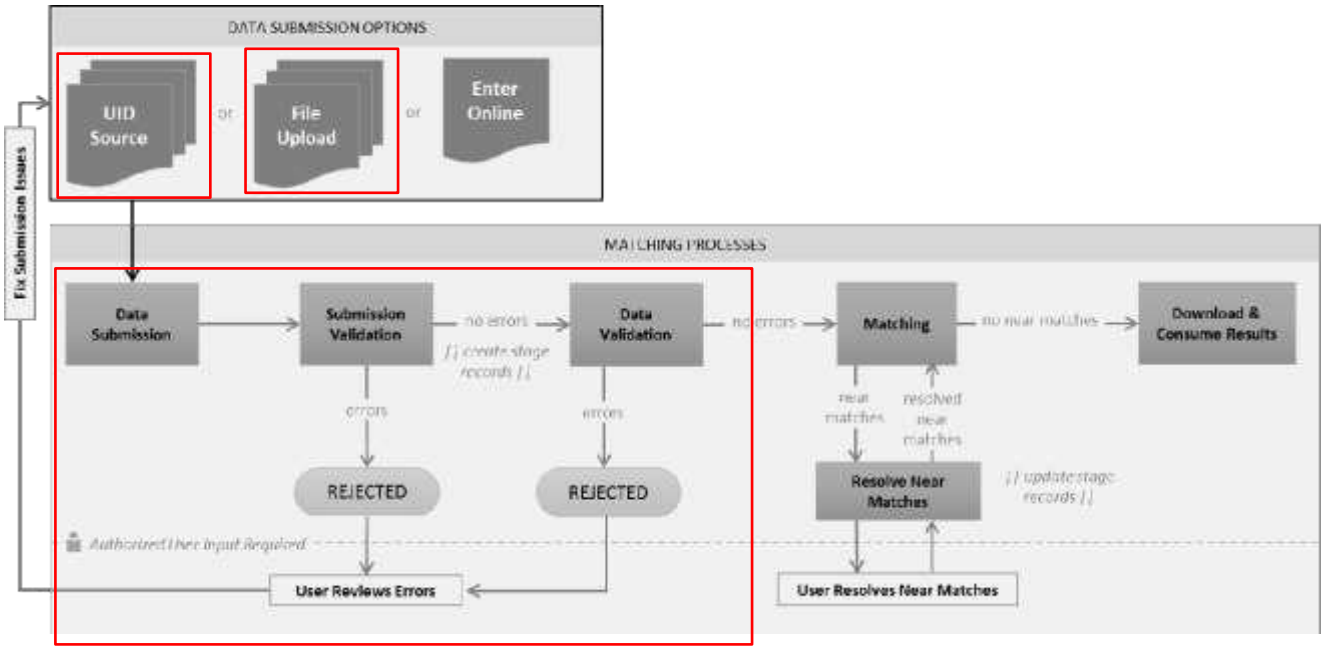


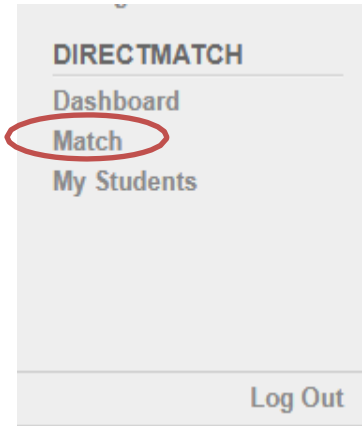
Next Actions Buttons

These buttons walk a user through the steps of the Match 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 DirectMatch Application Overview for a description of each step in the Match 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 Match processing, all those submissions will restart where they left off in their processing when the server is restarted.

STEP 1: SUBMIT STUDENT DATA AND VALIDATE SUBMISSION





About DirectMatch

Users can select the **Match** link in the Main Menu to initiate the DirectMatch matching process.

This feature allows users to:

- Upload a student batch file
- Validate Data
- Match Records
- Resolve Near Matches
- Download Results

When the **Match** link is selected, the ***Direct Match – Match*** page will be displayed.

Users can select the **Match** link in the Main Menu to initiate the DirectMatch matching process. Once the ***Direct Match – Match*** page has been displayed, users can select the submission type tab **"UNIQUE ID", "UPLOAD FILE"** or **"ENTER ONLINE".**

LEAs (for example Nonpublic schools) that do not use eUID for the assignment of LASIDs will not be able to use the "**UNIQUE ID**" option for student data submission.

NOTE: Users can only source and submit data to DirectMatch for their LEA. The DirectMatch application will pre-populate the LEA field with the user's LEA. Users with authorization to access multiple LEAs should click the **CHANGE LEA CODE** link under **MORE** from the **Main Menu** page to source and submit data for each LEA for which they have access.

Nonpublic schools who do not submit student data to eScholar cannot use the "Unigue ID" data submission method.

DirectMatch – MATCH > Unique ID Source

Users can initiate the DirectMatch process and source data directly from the eUID application without having to submit new student enrollment information. ****Not available to nonpublic schools who do not submit data to eUID.**

Steps

To source student enrollment data from eUID, users should follow these steps:

1. Access the **"UNIQUE ID"** tab.
    - The application should default to the "**UNIQUE ID**" tab, otherwise click on the "**UNIQUE ID**" tab to access this option.

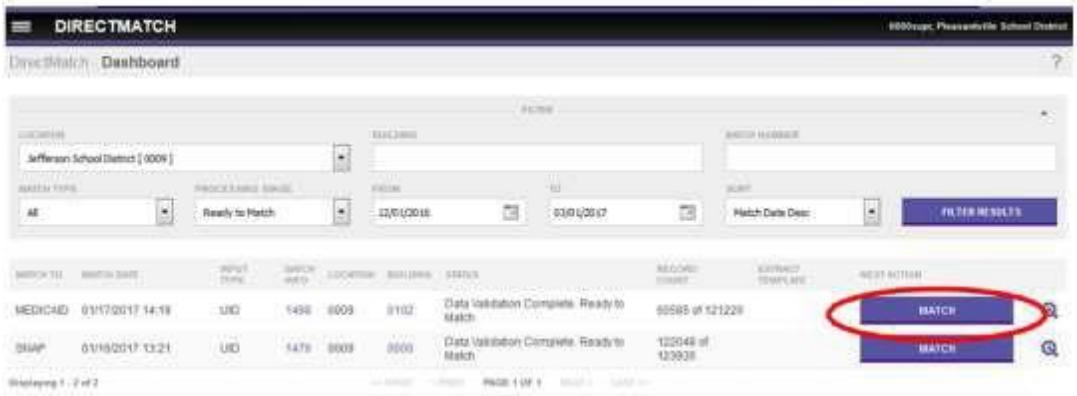
2. Select the "**Match To"** program = **SNAP.**

3. Click the MATCH button. This initiates the sourcing of data directly from eUID.

4. The *Data Validation* process is initiated.
   - In the "**STATUS**" column, A message will be displayed ***"Data Validation is in progress"***
   - The ***Date*** and ***Batch Number*** will be displayed

5. Users should click the BACK TO DASHBOARD button to return to ***DirectMatch – Dashboard*** page to check for the updated status of the process. Since the data is being sourced from eUID, no validation errors should occur and the process should proceed to STEP 2: MATCH RECORDS.

6. After data validation is completed:
   - On the ***DirectMatch – Dashboard*** page, a message will be displayed ***"Data Validation Complete. Ready to Match"***
   - The Record Count from the eUID Sourcing will be displayed
   - Other information about the batch will be displayed including *Date/Time*, *Input Type*=**UID**, *Batch Number, LEA, and Record Count*
   - The MATCH button will be displayed indicating the scoring phase of the Matching Process can now be started (Refer to section STEP 2: MATCH RECORDS).



DirectMatch - MATCH > Upload File

Users can initiate the DirectMatch process by submitting student data using a Batch File that contains one or more records per LEA Code. The Batch File must be located on the User's local computer system.

Steps:

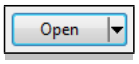
To source student submission data from a Batch file, users should follow these steps:

1. Click the "**UPLOAD FILE**" tab.

2. Select the "**Match To**" = **SNAP**

3. 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.

4. Browse through the directory structure and choose the directory/folder where the batch file is stored.



5. Select the appropriate file from the local system and click the button.

6. Click the MATCH button. This uploads the file listed in the "File to Upload" field to the DirectMatch application for subsequent processing.

7. Click the CLEAR button to reset the page and clear out the user selections (if needed).

File Validation for Upload File submission

Once the Batch File is uploaded, 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.

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 through the Dashboard by filtering using the "Rejected" processing stage.

NOTE: Only File Format v3.0 for uploading files is supported in the DirectMatch application.

File Upload Success

If there are no file issues within a batch, the application will allow the user to view details about the batch and to proceed to the *Data Validation* step (Refer to section Data Validation for Upload File Submission).

Batch Information

Once a batch has been submitted, users can click the *Batch Number* in the "**BATCH INFO**" column to display the status of the Batch file. This information can be displayed at any point during the batch process. A Batch Info pop-up window will be displayed when the button is clicked (Refer to APPENDIX A – BATCH INFO Window).

Data Validation for Upload File submission

Once a submission has passed the *Data Submission* and *File Validation* steps, the next step in the Match Process is *Data Validation*. This process applies further checks to the data stored in the staging table including validation of valid values such as dates and codes, and user authorization for submitted records. This step will produce validation errors (validation failure) or will allow the user to proceed to the next step of the Match process if there are no validation errors.

To validate data, users should perform the following steps:

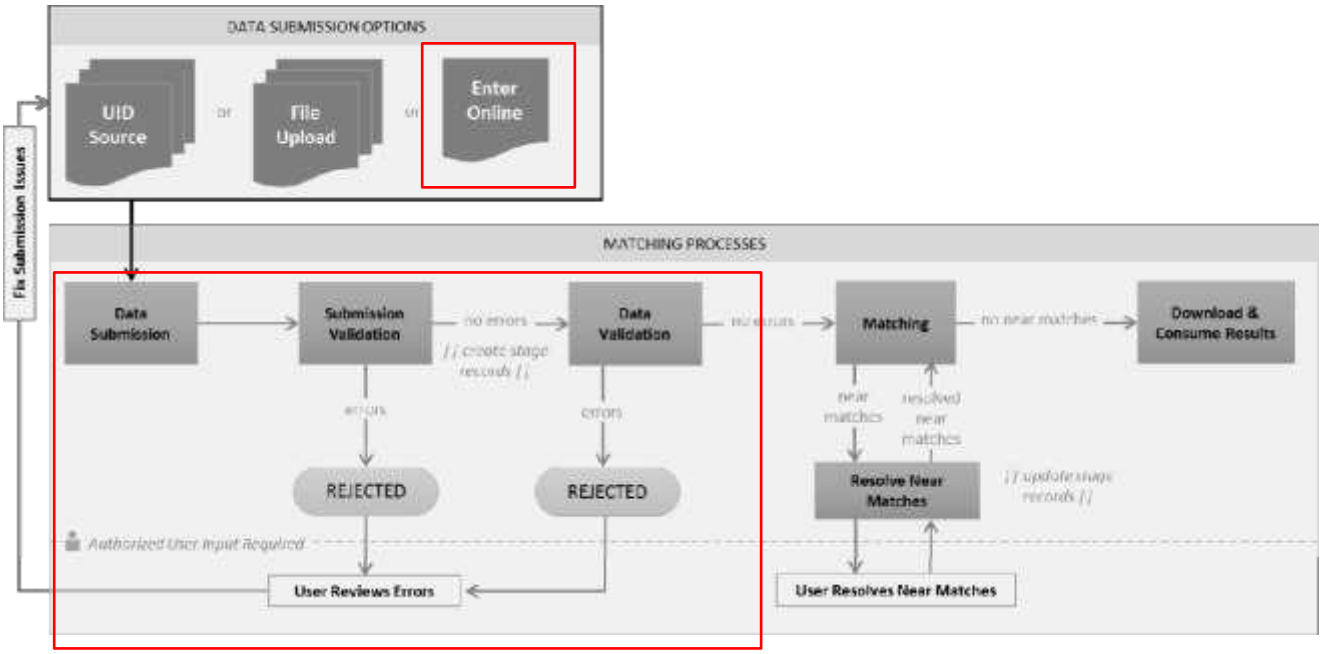
1. Upload a Batch as described above.
2. Click the VALIDATE DATA button (Some DirectMatch applications will automatically move to the Data Validation process without user input.)
3. A validate data page will be displayed. View the batch info and validation details as needed.

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

NOTE: If no errors are found during File Validation, the application sets the batch in the "Ready to Match". If errors are found during Data Validation, the application cancels all the records in the batch and DOWNLOAD button will be displayed. All records along with the error will be included in the File Format 3.0 extract in the Canceled file.

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.

DirectMatch - MATCH > Enter Online

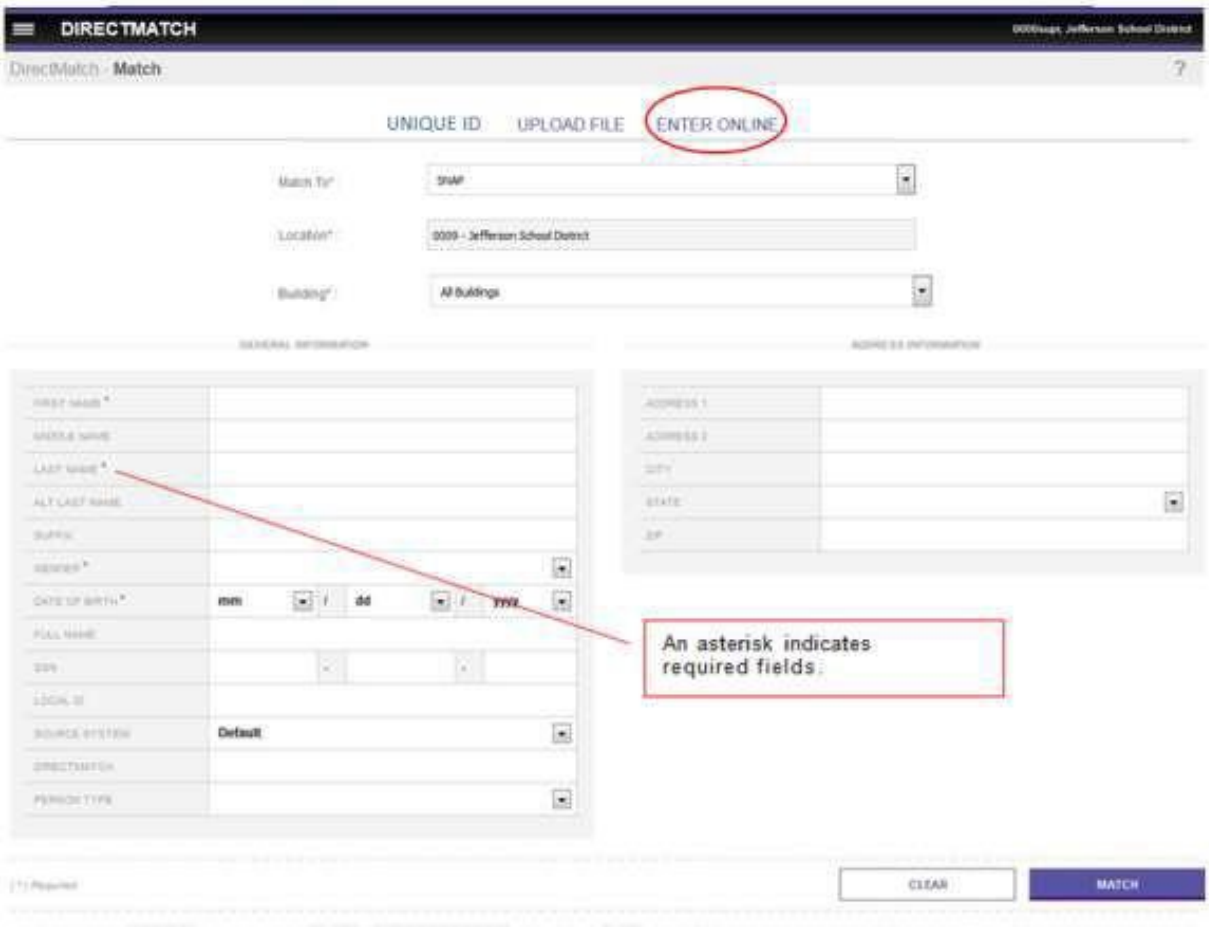


The purpose of the "**ENTER ONLINE**" tab is to allow users to initiate the DirectMatch process by submitting student data one student at a time using an online entry form.

Steps

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

1. Click the **Match** link on the Main Menu.
2. Select the "**ENTER ONLINE**" Tab
3. Complete the online entry form by entering the student's information in each field. Certain fields are required.



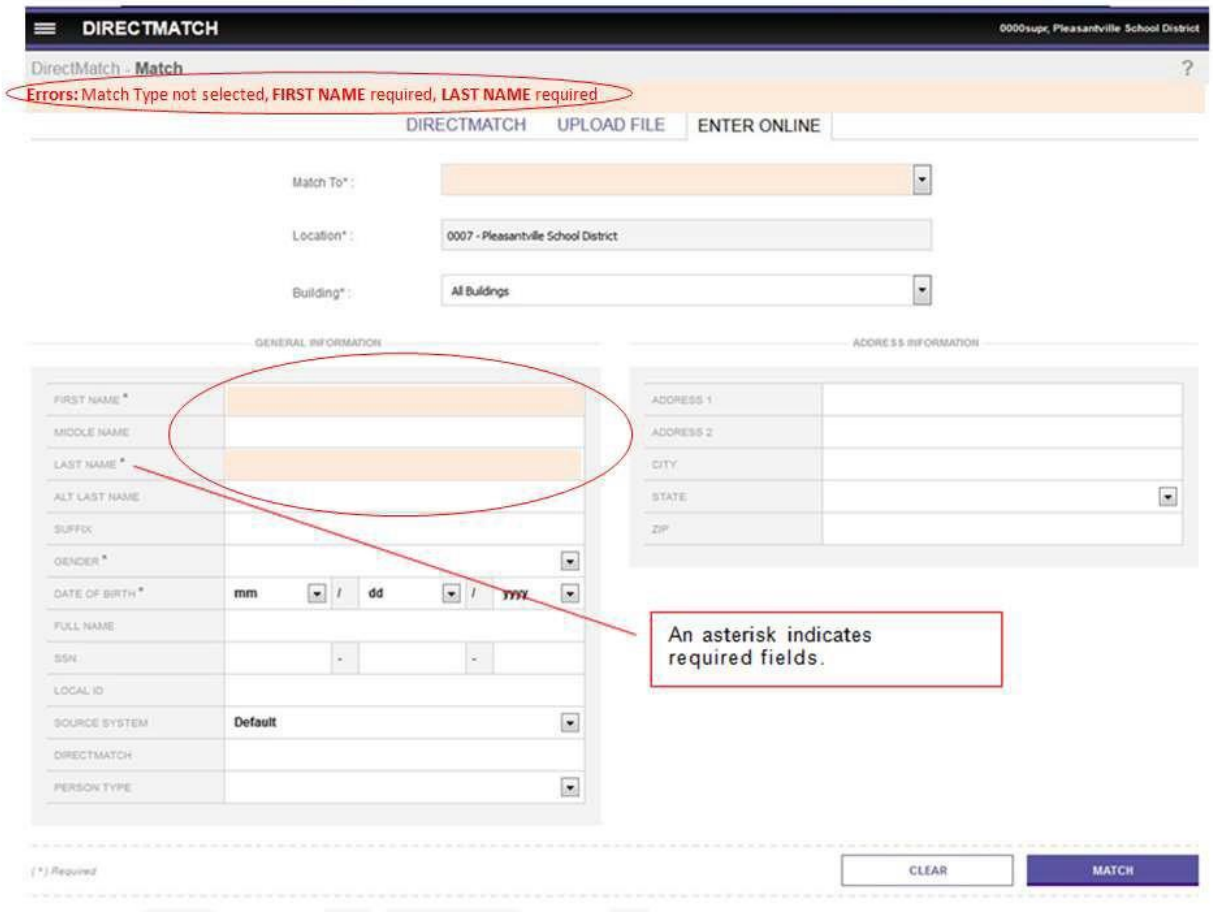
NOTE: The sections, fields, field labels, field requirements displayed to the user are dependent on the Default File Layout and Enabled/Required Fields set by the System Administrator.

4. Once the online entry form has been completed, including all required fields, click MATCH button.
5. Click the CLEAR button to reset the page and clear out the user selections/inputs (if needed).

NOTE: The State ID or LASID field is required for an online entry submission to reference the eUID data and tag an existing eUID record as a match or a no match.

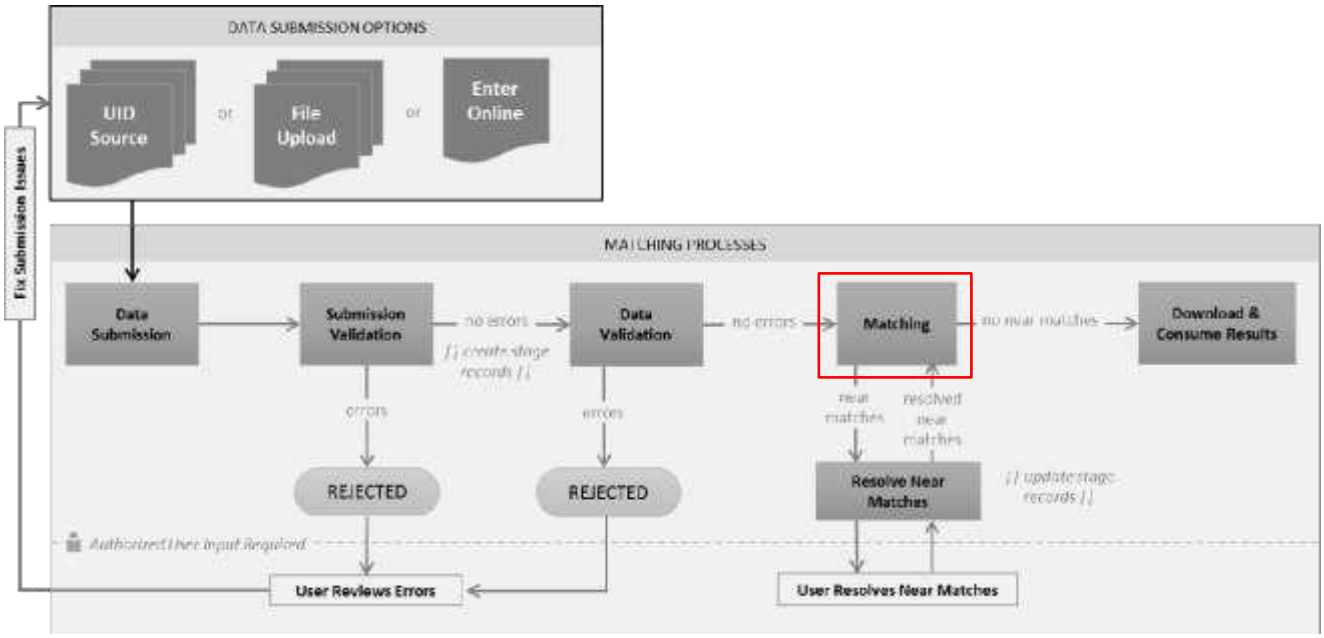
Validate and Fix Errors

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



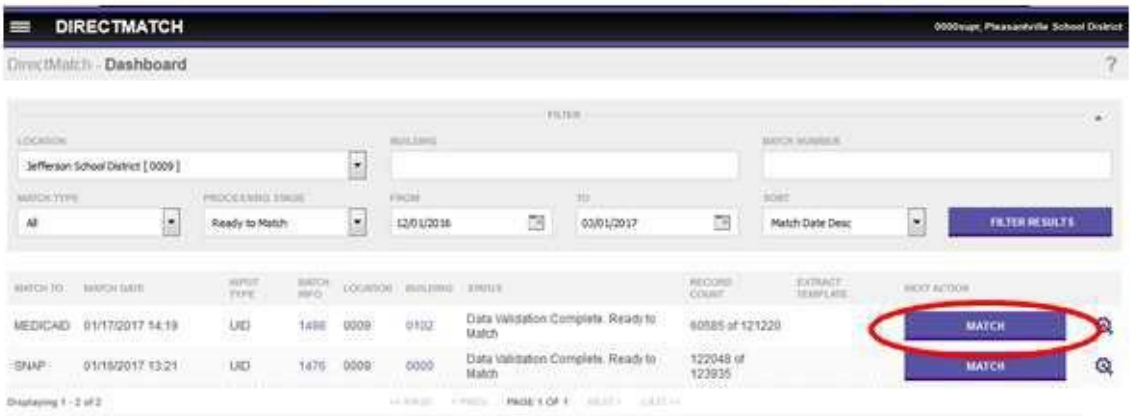
All errors displayed on the online entry form should be corrected. Once all corrections are made, clicking the MATCH button which will take the user to the next step in the Match Process. The application <u>will not</u> proceed to the next step of Matching until all fields successfully pass validation.

STEP 2: MATCH RECORDS



On the ***DirectMatch – Dashboard*** page, after all validation errors are addressed, the

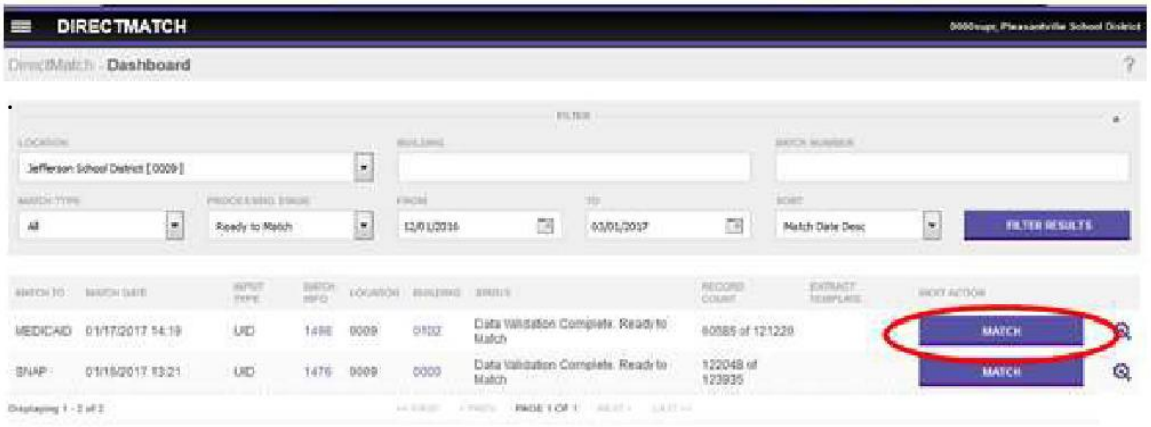
button will be displayed. When selected, the scoring phase of the Matching Process will be initiated.



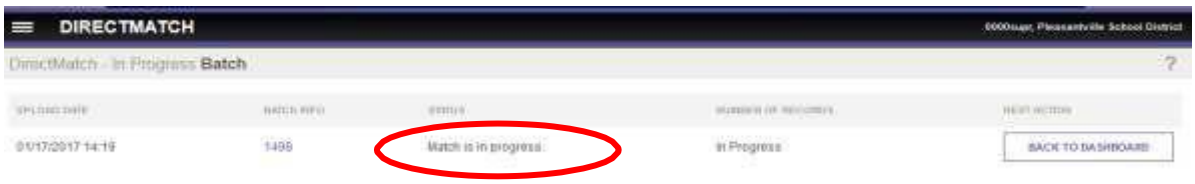
Steps

To initiate the scoring phase of the match process, users should perform the following steps:

1. Click the MATCH button in the **"NEXT ACTION"** column.



2. When this process is initiated, the DirectMatch application displays an intermediate page ***DirectMatch – In Progress Batch*** page and displays a match status message "*Match is progress*".



3. To review the updated status of the assignment process, return to the Dashboard by clicking the BACK TO DASHBOARD button.

4. Review the **"STATUS"** column for the updated status or click the *Batch Number* under the **"BATCH INFO"** column to review information about the batch.

5. Review the **"NEXT ACTION"** column for the appropriate next step(s).

   Based on the matching algorithm, the DirectMatch process can result in three different match decisions when attempting to match a student submission record to the statewide list of SNAP recipients:

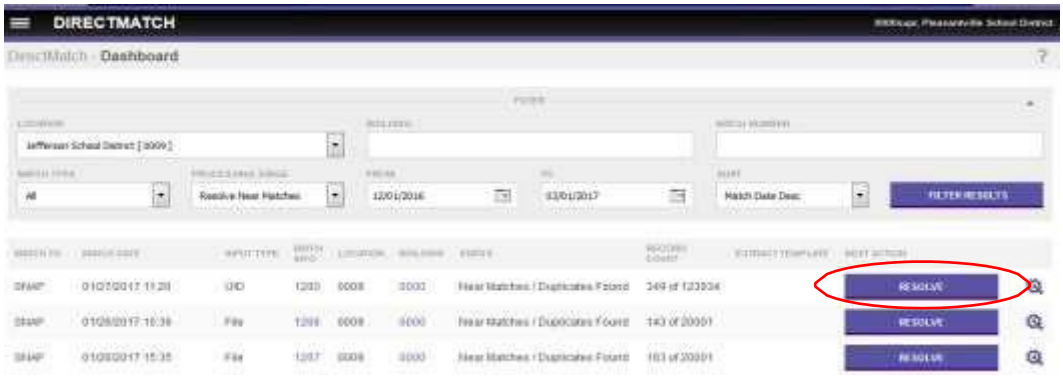
   a. **MATCH:** For each match of a student submission record to a SNAP record, the Recipient ID of the SNAP record will be linked to the student submission record and it will be marked as a **MATCH**. No further review of the record is needed.

   b. **NO MATCH:** If the student submission record does not match any of the SNAP records listed, the student submission record will be marked as a **NO MATCH**. No further review of the record is needed in the current batch.

   c. **NEAR MATCH:** For each near match of a student submission record to 1 or more SNAP records, the record will be marked as **Ready to Resolve Near Matches/Duplicates**. Each near match record must be manually reviewed along with the SNAP near match records listed to determine if there is a match to any of them.

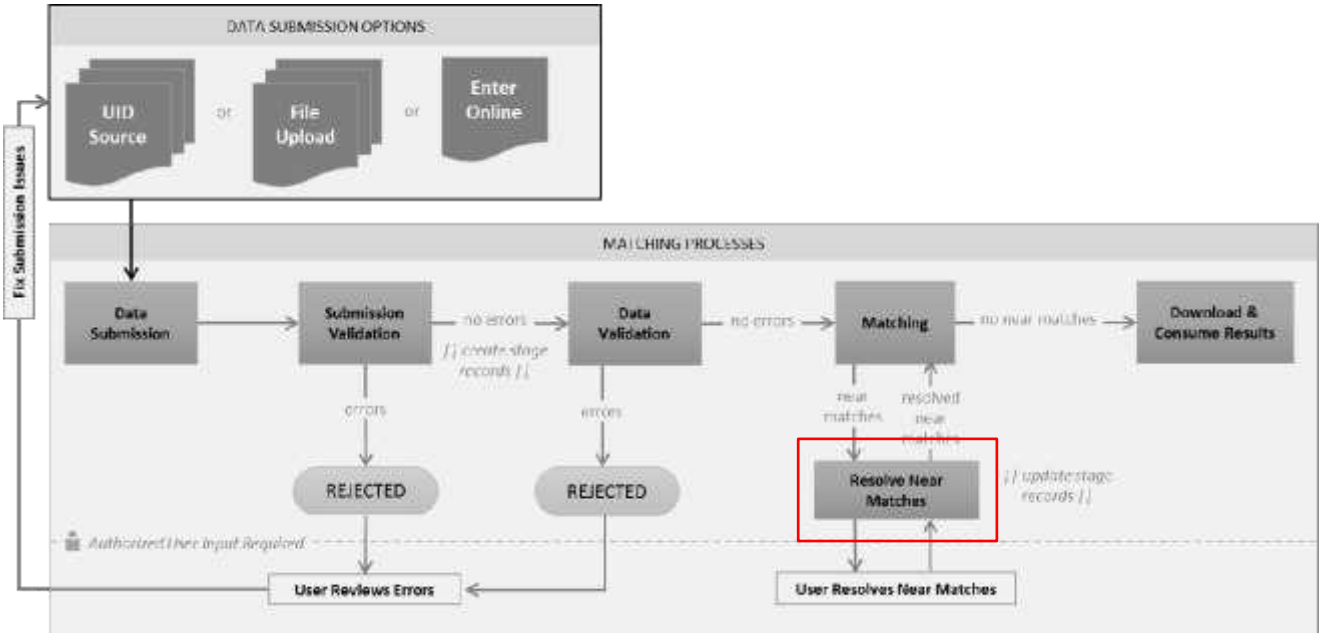
6. Complete the **"NEXT ACTION"** step by clicking the appropriate button.

   a. If one or more Near Matches are encountered for a student record, the **"STATUS"** column for the batch will be "Near Matches / Duplicates Found" and the **"NEXT ACTION"** column will display a RESOLVE button:



   b. If there are no near matches, the **"STATUS"** column for the batch will be "Match Completed" and the **"NEXT ACTION"** column will display the DOWNLOAD button (Refer to STEP 4: DOWNLOAD RESULTS for more Information).

STEP 3: RESOLVE NEAR MATCHES



All Near Match records must be resolved before the user can continue to the next step in the Matchingprocess.

Within a batch, one student submission record may have one or many pending near matches from t h e SNAP file. When resolving a ppending near match, the user is identifying if a specific student submission record is the same or different than the pending near match (SNAP record). The student submission record either matches one of the SNAP records or does not match any of them. Please review the student submission record and the SNAP near match record carefully to make an accurate decision. The results will determine whether or not a student will be reported as eligible for free lunch.

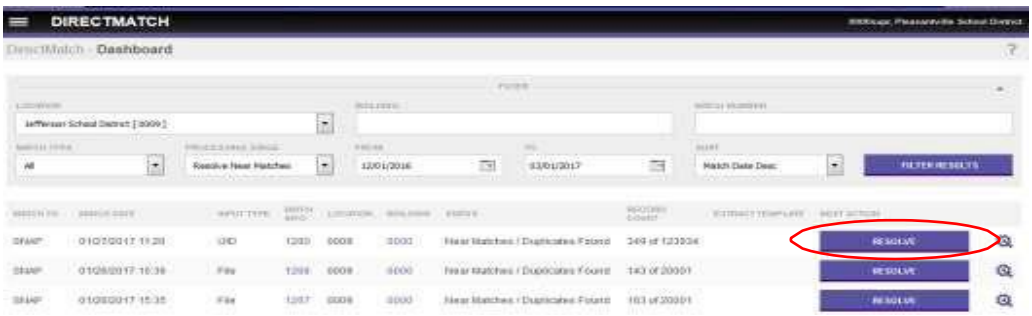
If a decision cannot be made right away for a specific record, a user can continue to review other records, however, a decision must be made for all records. If further research must be done in order to make a decision, when a user logs back into DirectMatch, they can simply return to the ***Direct Match - Dashboard*** page, select the batch they were working on to pick up where they left off. Near match decisions can be made from the following pages in *DirectMatch*:

- ***Resolve Near Match*** **page**
- ***Compare Near Match*** **page**

Steps

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

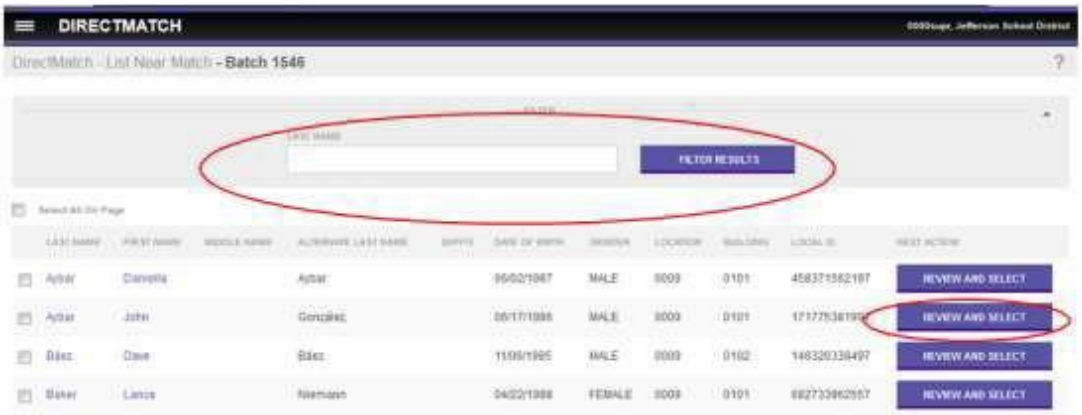
1. Click the RESOLVE button on the ***DirectMatch - Dashboard*** page to navigate to the ***DirectMatch - List Near Match*** page that displays a list of the near match records.



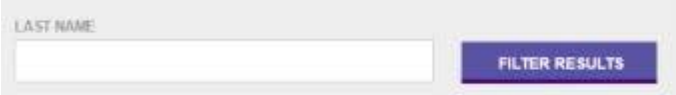
2. The purpose of the ***DirectMatch - List Near Match*** page is simply to display a list of the student submission records for which there are one or more near match SNAP records.

3. Click the REVIEW AND SELECT button for the student submission record to navigate to the ***DirectMatch - Resolve Near Match*** page to review additional details about the Near Match. A decision must be made as to whether the student submission record is a match to any of the SNAP records displayed or does not match any of them.

Please note the data listed in the following examples do not reflect actual enrolled students.



4. 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.



If the Last Name typed is not the last name of a student in the list, a ***"No records found"*** message will be displayed. You will need to navigate back to the ***DirectMatch - Resolve Near Match*** page.

- Return to the ***Main Menu*** icon located in the top left corner of the page.
- Click the Dashboard

- Click the RESOLVE button to return to the ***DirectMatch - List Near Match*** page.
- Click the REVIEW AND SELECT button to navigate to the ***DirectMatch - Resolve Near Match*** page.

5. On the ***DirectMatch - Resolve Near Match*** page, additional details about the Near Match can be reviewed. The <u>top section</u> displays the student submission record and the <u>bottom section</u> displays the potential matching SNAP record(s). Click the hyperlinked *Last Name* or *First Name* field to navigate to the ***DirectMatch - Compare Near Match*** page.

The match probability and type of match (Near Match or Match) reported by the Match process.

Clicking the hyperlinked *Last Name* or *First Name* field on the ***DirectMatch - Resolve Near Match*** page will navigate to the ***DirectMatch - Compare Near Match*** page which will display additional details about the submission record and the SNAP Near Match record.

For comparison, the fields on the student record ("Submission Record" row/column) and the fields on the near match SNAP record ("SNAP Index Record" row/column) will be displayed for use in making a Match or No Match decision.

DirectMatch – Compare Near Match – **Batch 1546**

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MAT
CH
SCO

DANIELLA AYBAR **(SUBMISSION)**

GENDER: FEMALE | DATE OF BIRTH: 874-65-6663 06/02/1987 | LOCAL ID: A05968 | SSN:

vs

DANIELLA AYBAR **(095812345)**

GENDER: FEMALE | DATE OF BIRTH: NOT PRESENT 06/02/2004 | LOCAL ID: | SSN:

COMPARE RECORDS

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

FIELDS	SUBMISSION RECORD	SNAP INDEX RECORD (RECIPIENT ID: 095812345)
FIRST NAME	DANIELLA	DANIELLA
LAST NAME	AYBAR	AYBAR
MIDDLE NAME		
STUDENT_NAME _SUFFIX		
PREVIOUS_LAST_NAME	AYBAR	
DATE OF BIRTH	06/02/1987	06/02/2004
GENDER	FEMALE	FEMALE
SSN	874-65-6663	NOT PRESENT
ETHNICITY INDICATOR		
RACE ETHNICITY	Asian/Pacific Islander	
DISTRICT_CODE	W1A	
SCHOOL_CODE	W1A001	
GRADE_LEVEL	KINDERGARTEN	
SOURCE_SIS_CODE	SIS	
LOCAL_STUDENT_ID	A05968	
RECIPIENT ID	NOT PRESENT	312853348446
ADDRESS 1	7494 CLEAR ANCHOR STREET	7494 CLEAR ANCHOR STREET
ADDRESS 2		
CITY	SAN FRANCISCO	SAN FRANCISCO
STATE	MA	MA
ZIP	02364	02364
CDE 5		
HOUSEHOLD SSN		XXX-XX-XXXX
HOUSEHOLD NAME		MARY AYBAR
SNAP FILE DATE		
	N/	
A COMMENTS		
MATCH NOTES	[NEAR MATCH)	

TIP: All fields in which the information differs between two records will be highlighted.

> **TIP:** If a near match was forced by the application, the reason for the near match will be displayed within the "Match Notes" row.
> **TIP:** The Social Security Number field will be masked (e.g., ###-##-####) and the application that field with italics and render the background color yellow when it differs between the student records.

6. Decide how the near match should be resolved and click the appropriate decision button. A near match is only resolved once, so once a user clicks a decision button the near match is resolved. ***Once a decision is submitted, it cannot be reverted.** * Some users may have the ability to correct a match result at a later point (Refer to the section Editing DirectMatch results).

   a) On the ***DirectMatch – Compare Near Match*** page, if a decision cannot be made:

      i. Users can click the RETURN TO LIST button to navigate back to the ***DirectMatch – Resolve Near Match*** page.

      ii. Users can click the SELECT ANOTHER RECORD button to navigate back to the ***DirectMatch – List Near* Match** page to move a different student submission record.

   b) On the ***DirectMatch – Compare Near Match*** page, if the student under review is different from the student listed in the SNAP record, the user should click NO MATCH button. With this action, all near matches for the student record will be removed from the near match queue.

c) On the ***DirectMatch – Compare Near Match*** page, if the student under review is the same as the student listed in the SNAP record, the user should click the MATCH button. With this action, the process will navigate to the ***DirectMatch - Resolved Near Match*** page. A message will be displayed "ID successfully assigned – A match was found". The SNAP Recipient ID for the student will be retrieved from the student's matching SNAP record and all other near match records will be removed from the near match queue.

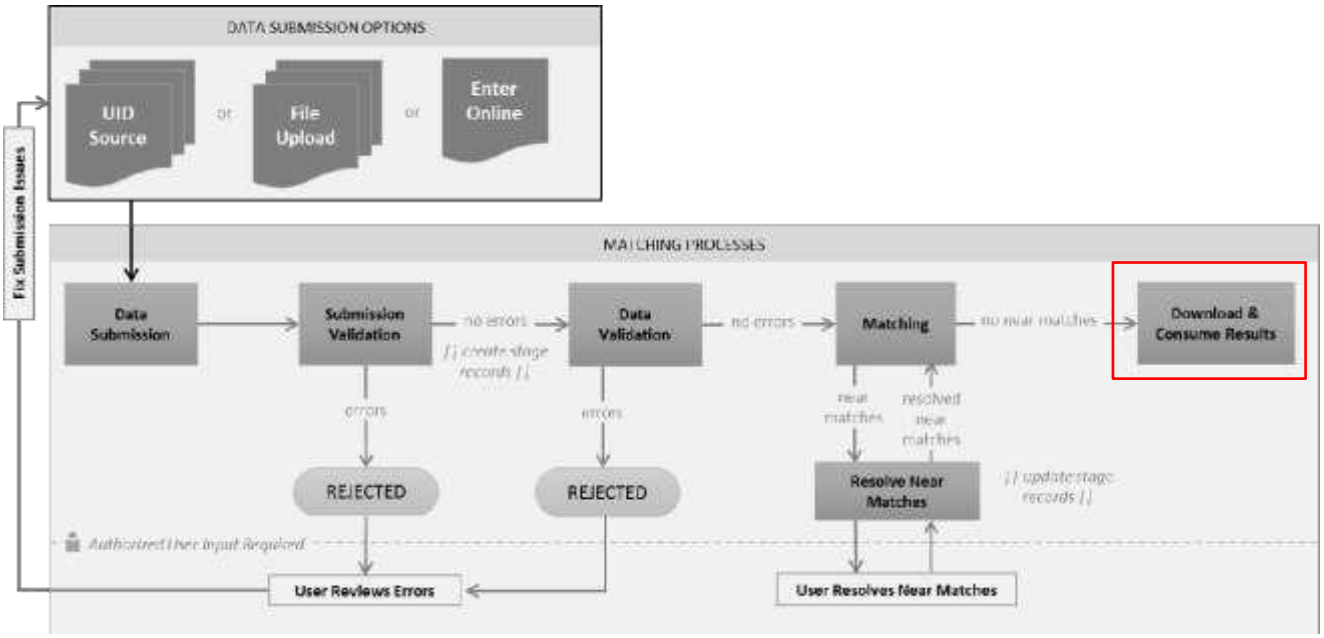
d) If the user wishes to cancel the student record under review, the user should click the CANCEL RECORD button. With this action, all pending near matches for the student record under review will be canceled and a match/no match decision will not be made. **NOTE: This student record must be resubmitted to DirectMatch for a decision.**

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

- On the ***DirectMatch - List Near Match*** page for the batch, each near match record includes a checkbox:
  - When the CANCEL ALL CHECKED RECORDS button is selected, all near match records that are selected (checked) will be canceled. Any unselected near matches will remain in the pending near match queue.
  - When the CANCEL ALL NEAR MATCH RECORDS FOR THIS BATCH button is selected, all of the pending near matches will be canceled and removed from the batch.

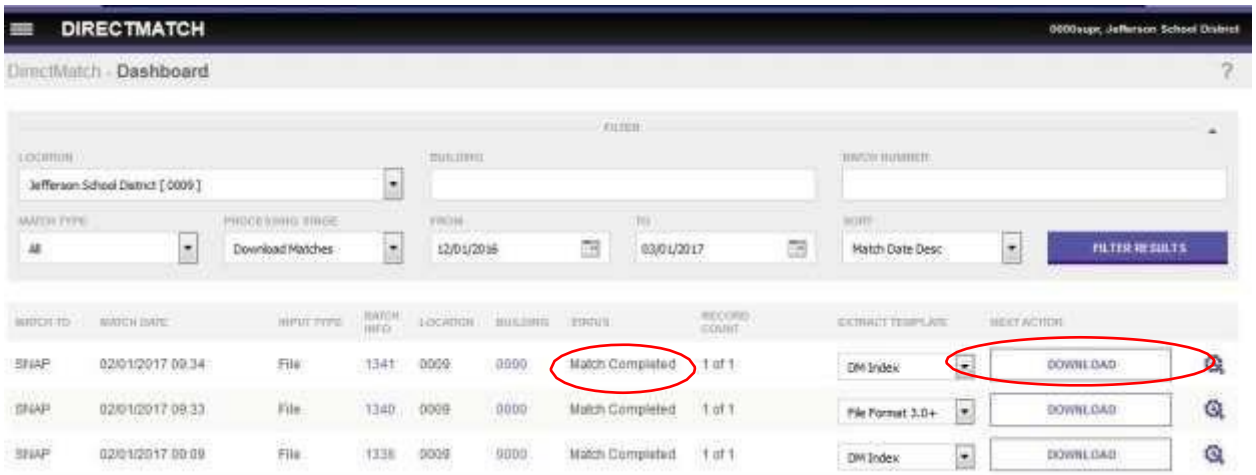
- **NOTE: Canceled records must be resubmitted to DirectMatch at some point for a MATCH or NO MATCH decision.**

STEP 4: DOWNLOAD RESULTS



Upon completion of the previous steps (data submission, matching, and near match resolution), the home page will display the status of the batch as "Match Completed" and a

DOWNLOAD button will be displayed in the **"NEXT ACTION"** column. This indicates the results for the batch are available for download.



Download Results

To download the results for a batch, users should follow the steps below:

1. Select the desired Extract Template from the dropdown box. For information regarding downloads, refer to APPENDIX D – Louisiana Secure ID v3.0 Upload and Download Formats.
   - **DM Index** – **This is the default download template**
   - **File Format 3.0**
   - **File Format 3.0+**

2. Click the DOWNLOAD button on the ***DirectMatch – Dashboard*** page for the appropriate batch.

3. Click the DOWNLOAD button on the ***DirectMatch – Download*** page to download the Match/No Match decisions file. Doing so will open a File Download dialogue box that enables users to either open and review the download file or save it to their local computer.

4. The format of records in the downloaded file will match the extract template selected in STEP 1 (*DM Index, File Format 3.0, or File Format 3.0+*). The matched records will include the SNAP Recipient ID assigned to that student (if there was a match).

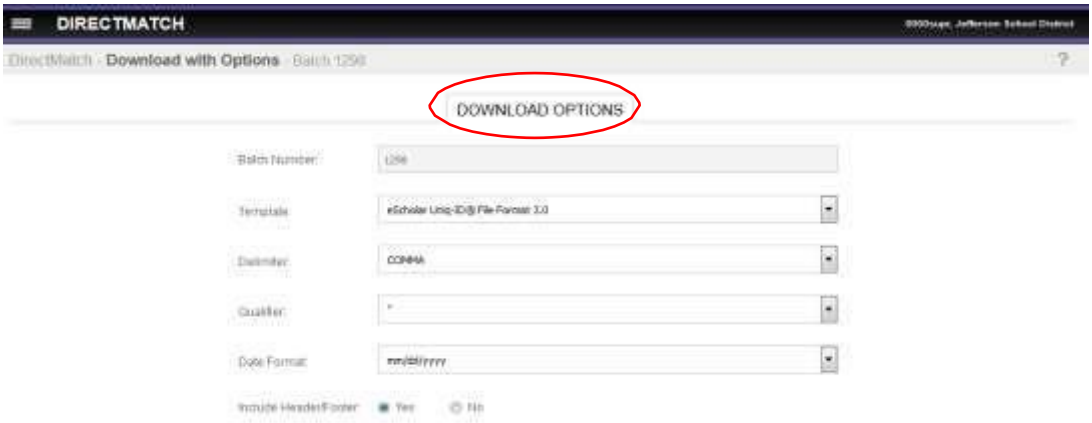
NOTE: Only the "Match Completed" Batch status allows the user to select an Extract Template. All other statuses will have a predefined template that cannot be changed.

Download With Options

The **Download with Options** functionality allows users to select specific download options, such as the extract template, 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:

Steps

1. Click the icon on the **Dashboard** page for the selected batch
2. *The **DirectMatch - Download With Options*** page will display the list of available selections in a form and allow the user to select specific download options as listed below:



   a. Template*: DM Index, File Format 3.0, or File Format 3.0+*
   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
      - Include Header / Footer: Yes and No. When No is selected, the header and footer will not be included in the extracted file.
3. Select the download options.

4. Select the batch records to extract using the radio button. Only one status at a time can be downloaded.

- **Match** – All student records in the batch found to be a match to SNAP
- **No Match** – All student records in the batch found to be a **no match to SNAP**
- **Canceled** – All student records in the batch that were canceled due to errors or canceled by the user during Resolve Near Match phase.
- **Match / No Match** – All student records in the batch found to be a match or a no match to SNAP
- **Ready to Resolve Near Matches** – All student records in the batch found to be in a Near Match status.
- The ***"STATUS RECORD COUNT"*** column will display the number of records in the batch matching that status.
- The "**TOTAL BATCH RECORD COUNT**" column will display the number of records in the batch.
- *Ready to Resolve Near Matches* and *Canceled* status records must be downloaded using the File Format 3.0 extract TEMPLATE.

5. Click the DOWNLOAD button.
6. Once the extract is generated and displayed in the next page, Click the DOWNLOAD button. Doing so will open the ***DirectMatch – Download*** page that enables users to either open the file or save it to their local computer.

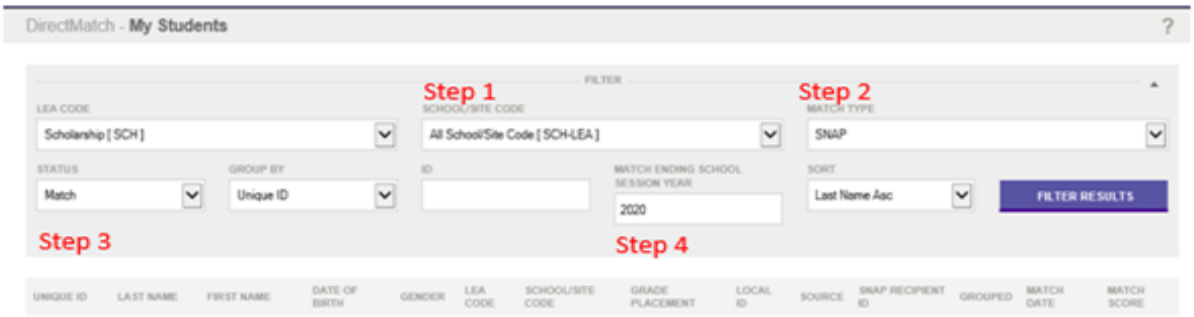
My Students- Allows all or Individual schools under one LEA code the ability to view site-specific information. *My Students* report allows user to get a total count of matched students. It can be filtered by LEA or site code. Once on the My Students page, the following steps can be used to get DirectMatch roster of matched students with totals.

1: Select School/Site

2: Match Type= SNAP

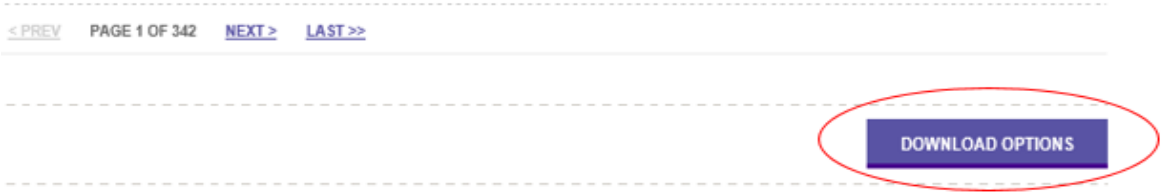
3: Status= Match

4: School Year= 2020

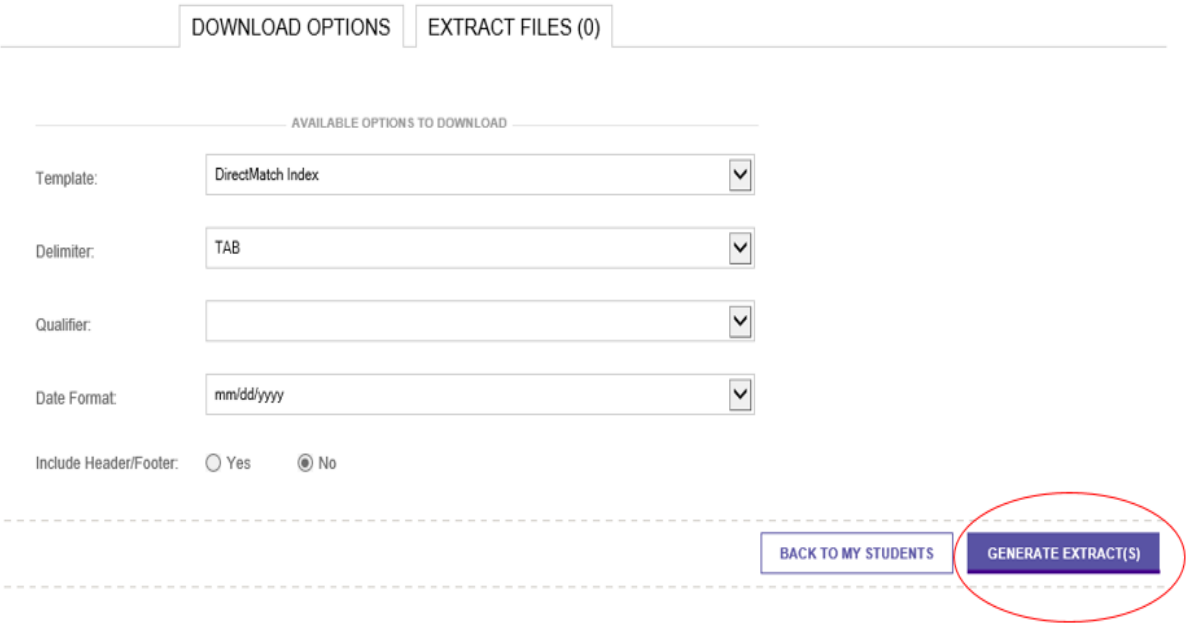


Once the list of matched students is displayed, users can download the list by doing the following steps.

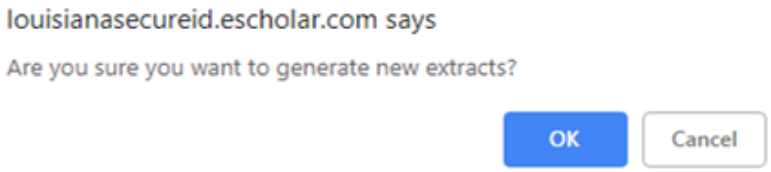
- Select Download options



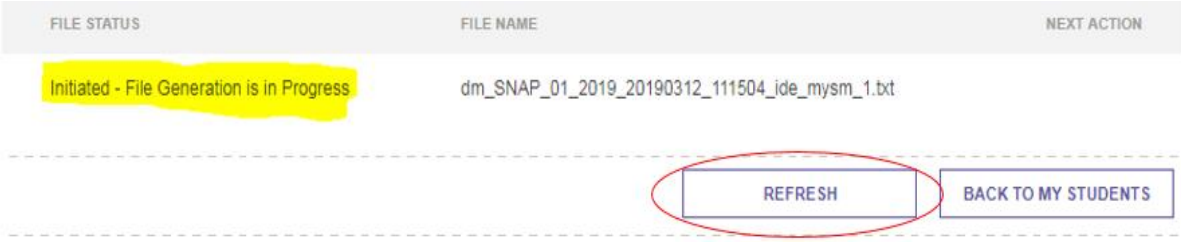
- Select Generate Extract(s)



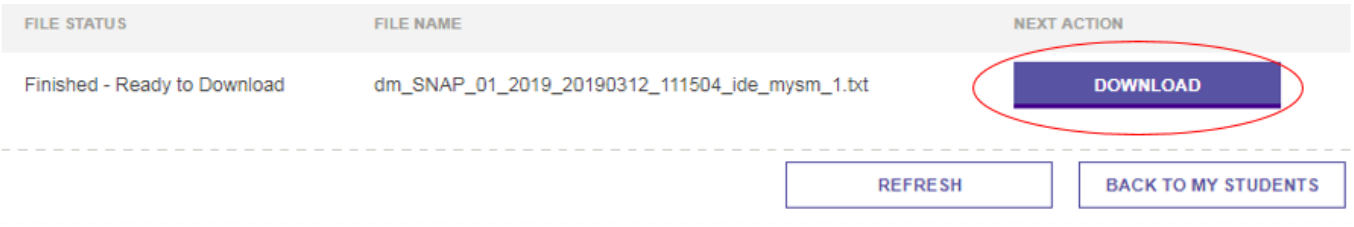
- Pop up screen will ask are you sure? Select OK



- Check file status, select refresh until purple download option appears

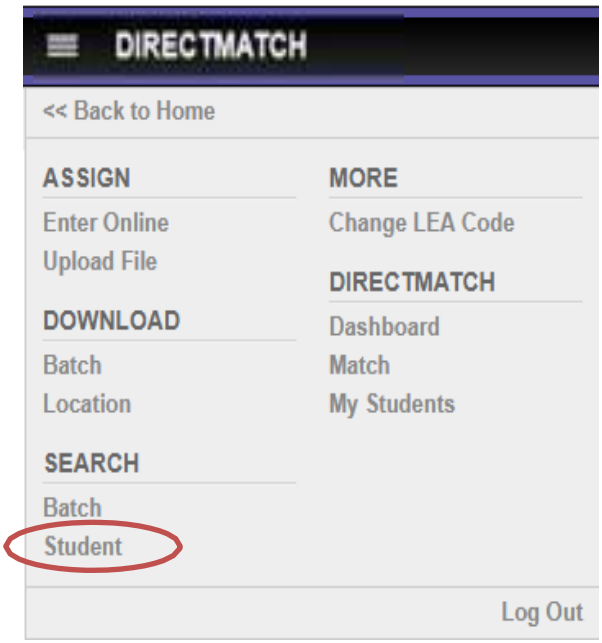


- Select Download



Additional Notes:
Grouped by State ID (Public/Charter) Local ID (Nonpublic) - No match score when Local ID is used. Shows date of first SNAP match by the LEA. File can be Download in 3 formats: FF 3.0, DM Index, and FF 3.0+

SEARCH > by STUDENT > DirectMatch



Based on the user role assigned for a User ID, certain users will have access to the eUID Search component feature that will allow them to search for student records online to view DirectMatch results. To access this feature, users can click the **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.

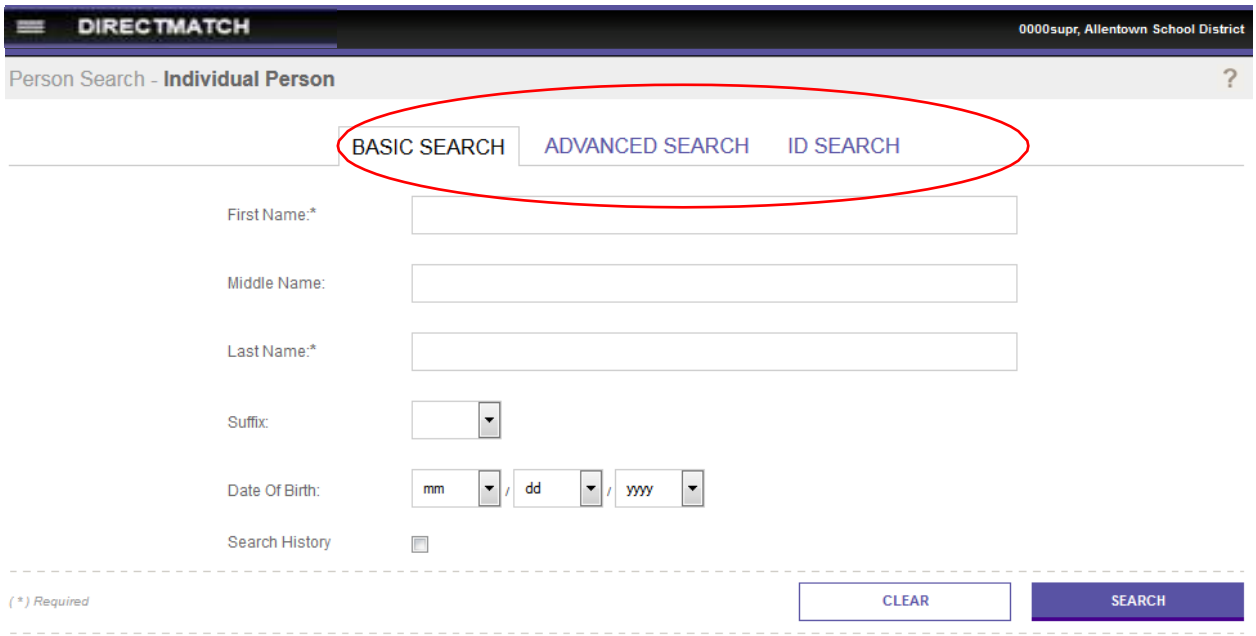
Some implementations may disable this feature for certain or all users. In such an instance, the link will not appear on the Menu.

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:

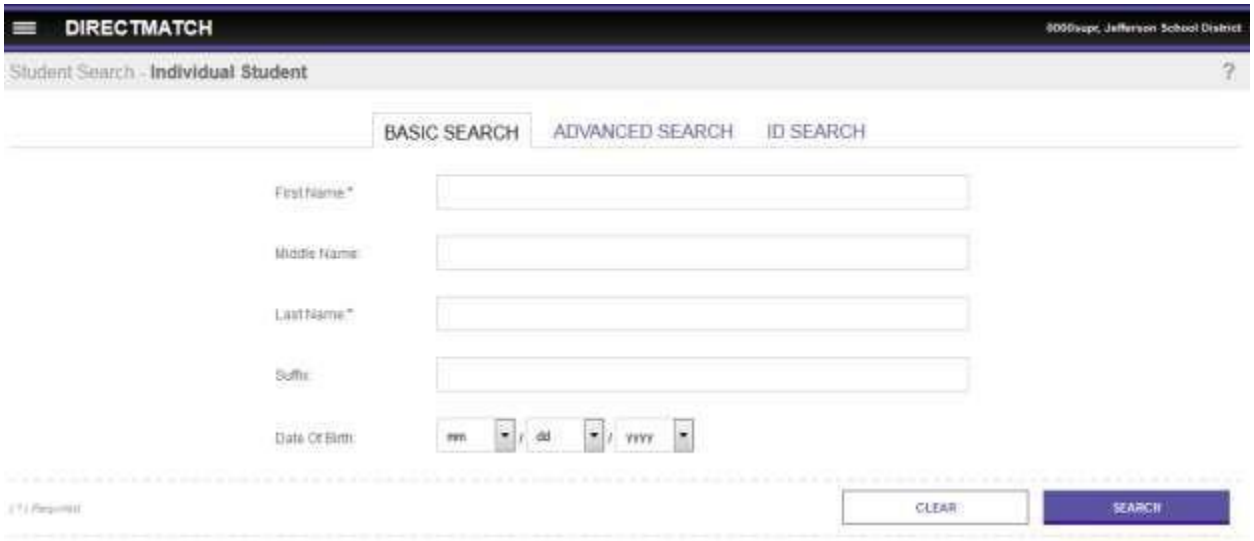
1. Click on the **Student** link under **SEARCH** from the Main Menu.
2. Click on the appropriate search tab. Three types of searches are available:
   - Basic Search
   - Advanced Search
   - ID Search



NOTE: The type of search tabs that appear when a user initially enters this application can differ from implementation to implementation.

Basic Search

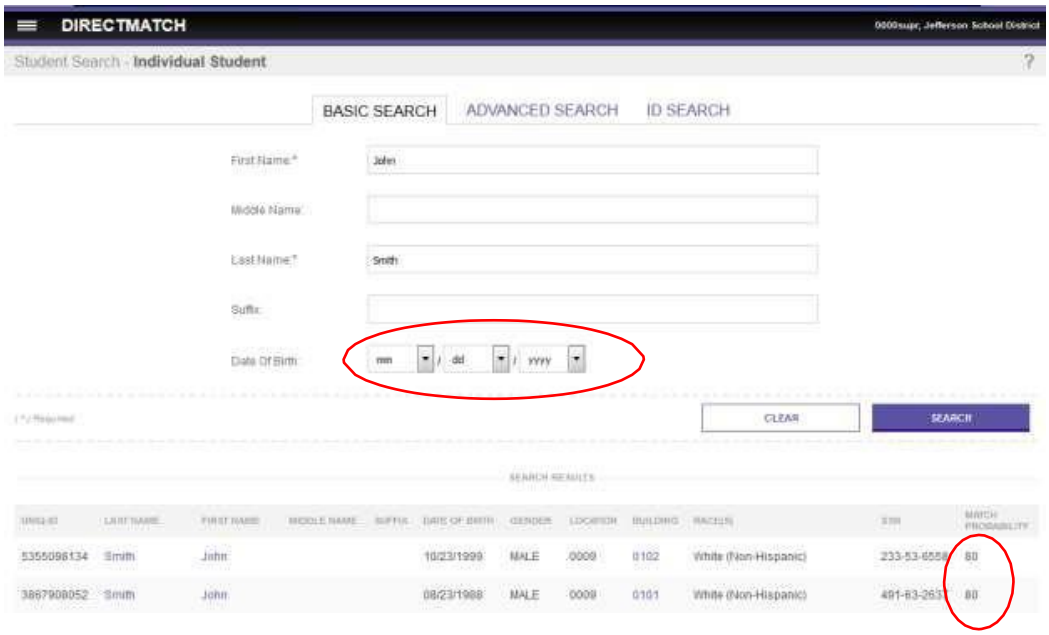
Basic Search allows users to search for a student using basic demographic information.



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

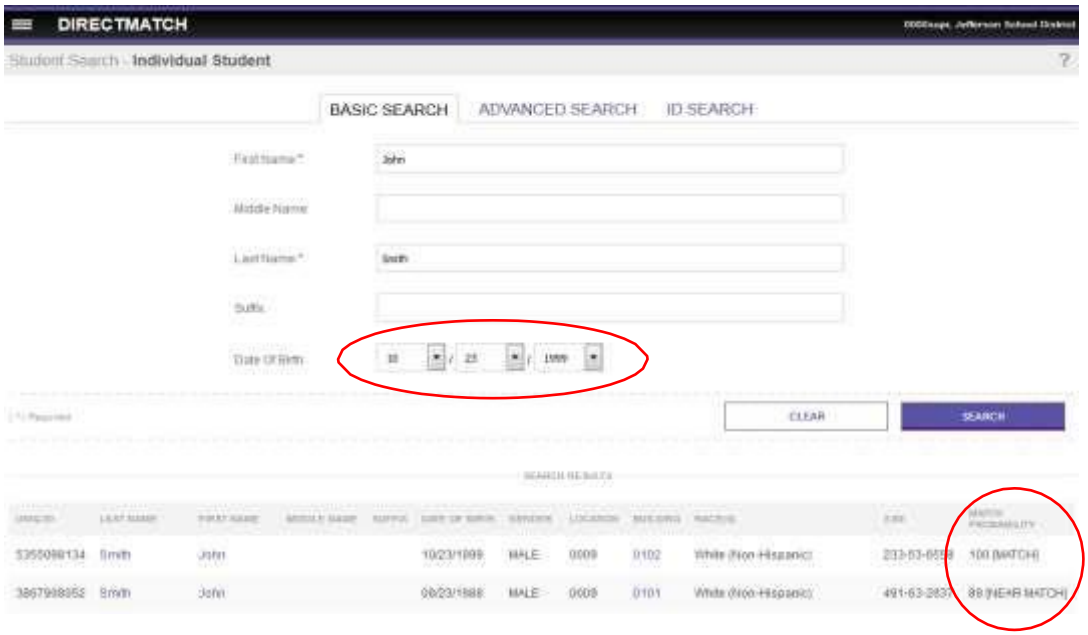
Search without a date of birth:

Enter the *First Name* and *Last Name* to search for student records with the same First Name or Last Name.



Search with a date of birth:

Enter the *First Name, Last Name,* and *Date of Birth* to search for student records with the same Last Name or First Name or Middle Name or Date of Birth.

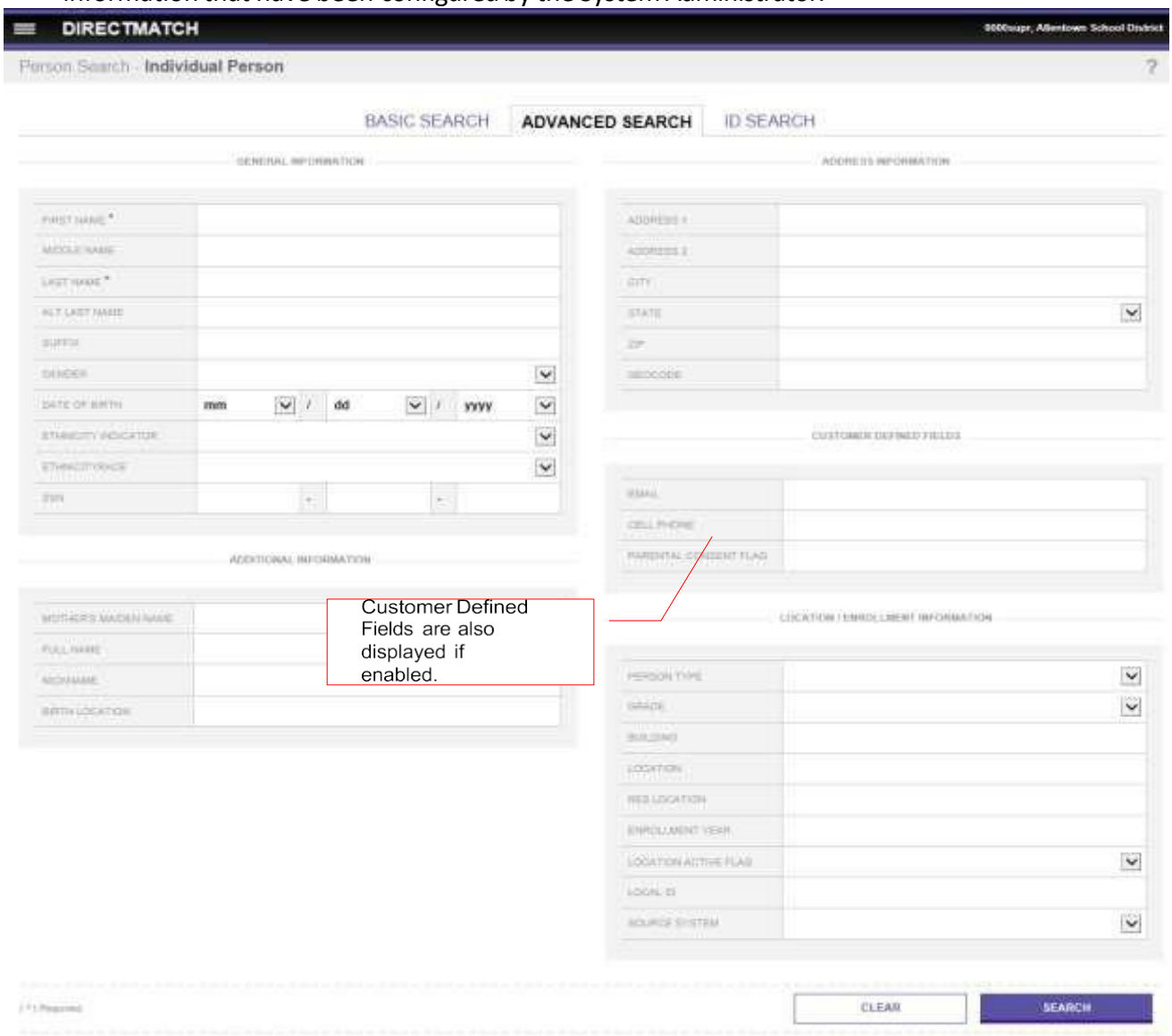


NOTE: To reduce the number of results returned, enter as much information as possible into the form. If minimal information is entered, such as just first and last name, the number of results displayed will be higher than if more details are included in the search criteria.

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

Advanced Search

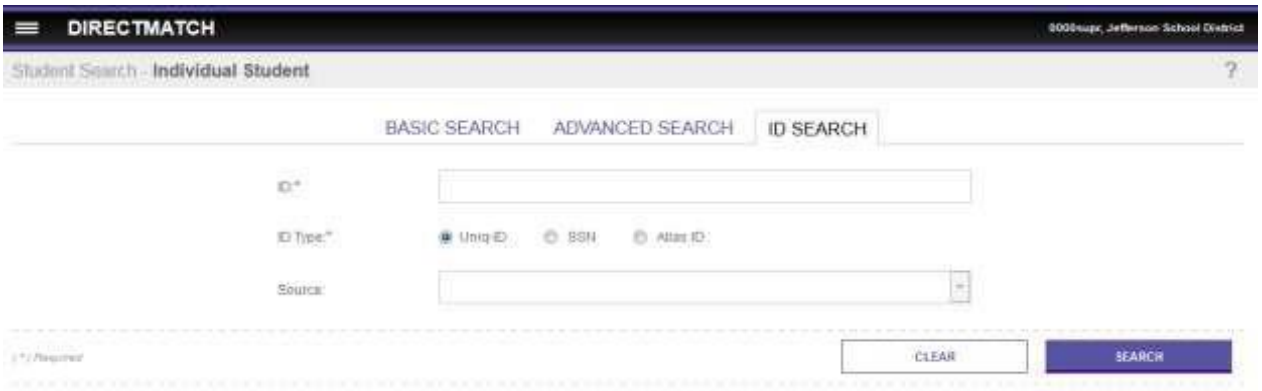
Advanced Search allows users to search for a student using all available fields. This includes any Customer Defined Fields (e.g. Address Information, Parental Consent, etc.) and additional information that have been configured by the System Administrator.



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.

ID Search

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



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

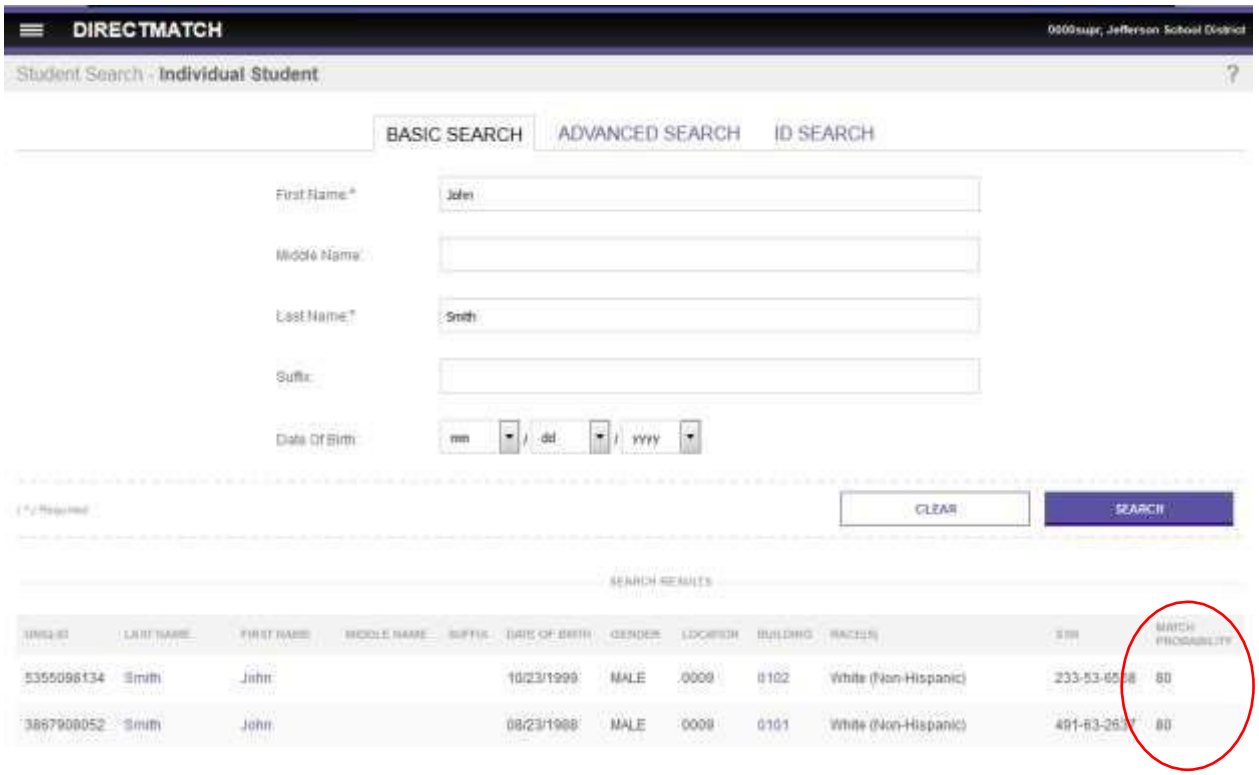
2. Click the SEARCH button.

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

Viewing the Search Results

Records Found

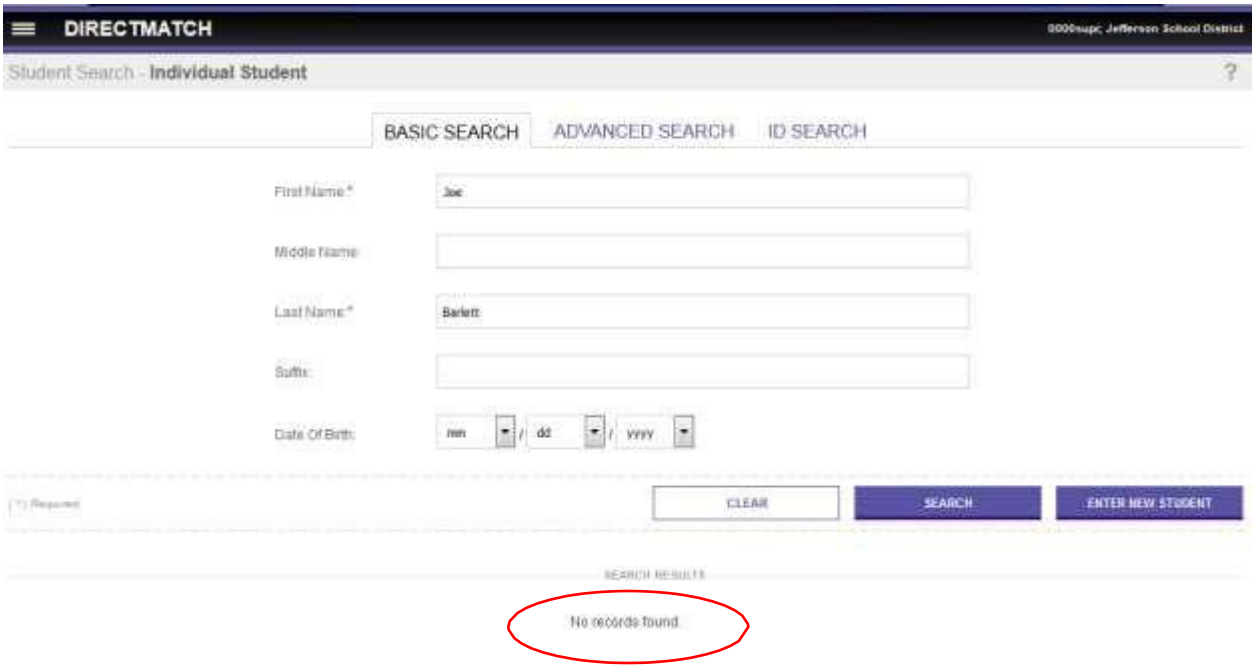
After selecting the **Search** button, the application will display the results of the search. When one or more student records are found, the application displays the matching records along with the match probability. The closest match will display as the first result in the list.



NOTE: There is an application-level setting that allows users to change the type of search that can be performed. 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.

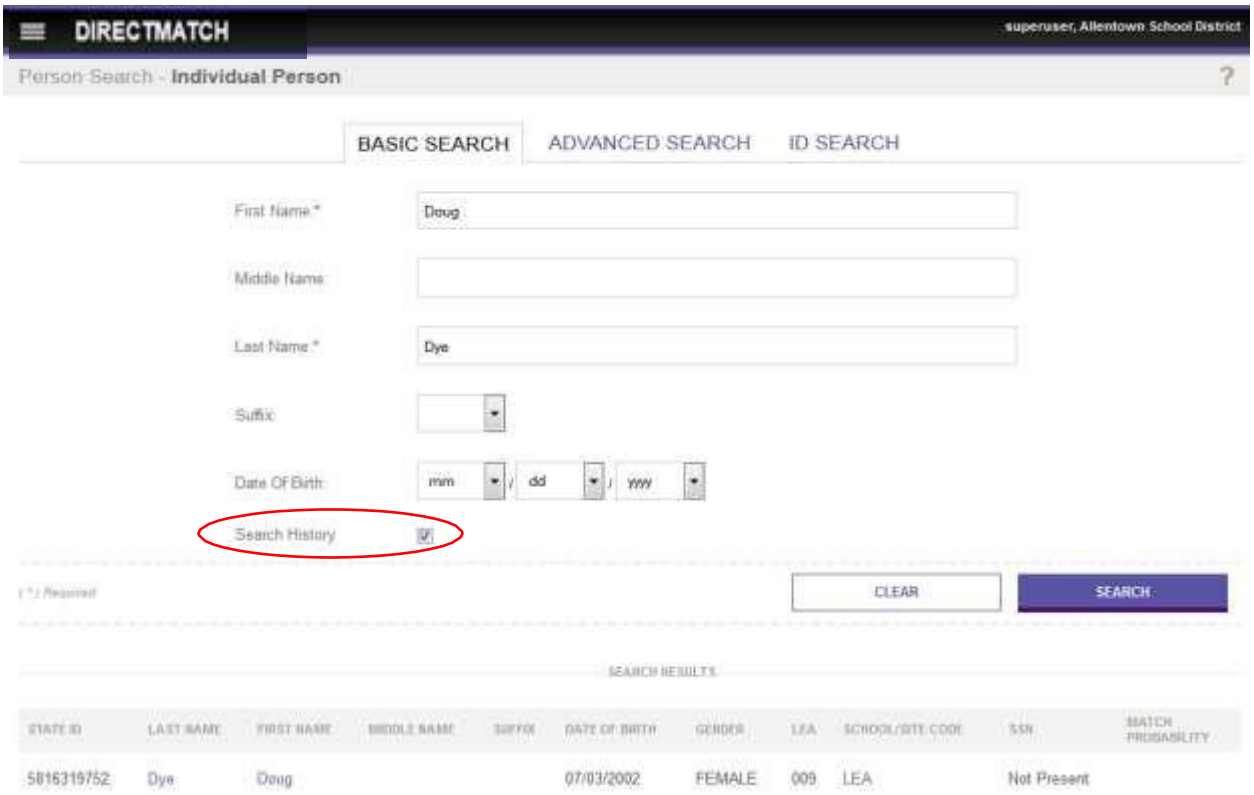
No Records Found

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.



Search History

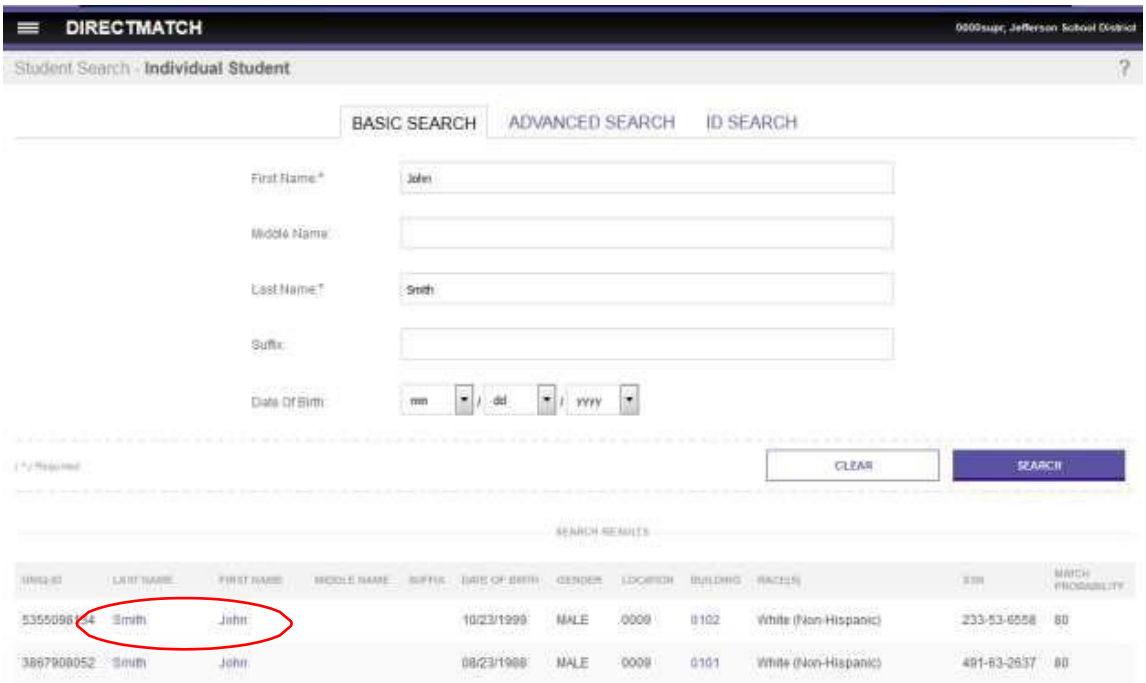
When SQL Server is the search type defined by a System Administrator, there is also a Search History option. When this checkbox is selected, the application will perform a search of history records for the information entered into the form. This may produce many results for one student.



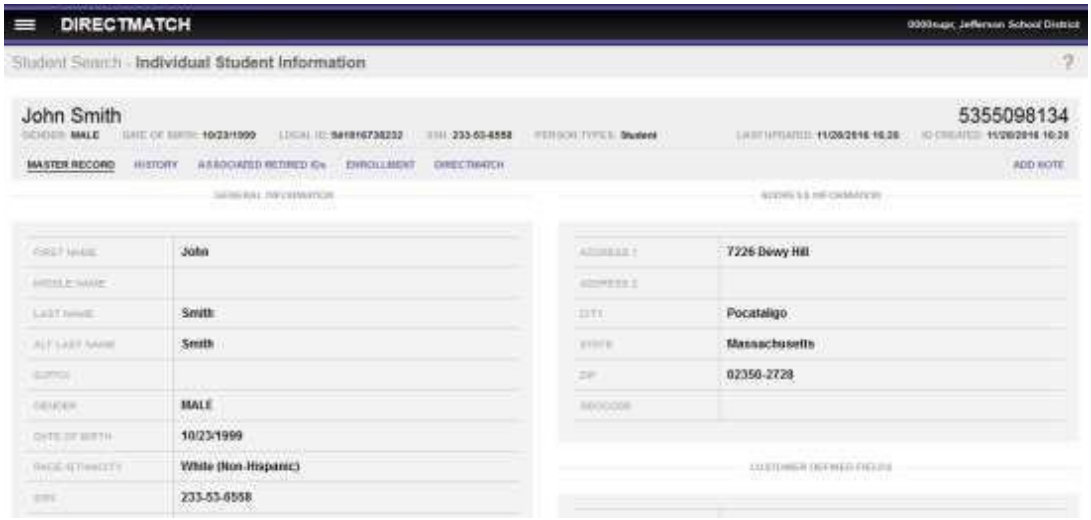
Viewing Individual Student Information

On the ***Student Search – Individual Student*** page, when results are returned, the user should perform the following:

a. To view additional information about the student, users should click the hyperlinked "Last Name" or the "First Name".



b. Upon clicking the hyperlink, the search ***Student Search - Individual Student Information*** page will be displayed with the student's current information.



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

- **Master Record -** 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 -** This section allows users to view additional information from History records.
- **Associated Retired IDs -** This section will display any IDs along with the student information that has been retired and associated to the ID under review.
- **Enrollment -** This section allows users to view, add, and edit enrollment events.
- **DirectMatch** (new in eUID v10.1) - This section allows users to view and edit DirectMatch decisions.

Based on User access authorization, a User may or may not have access to the above features.

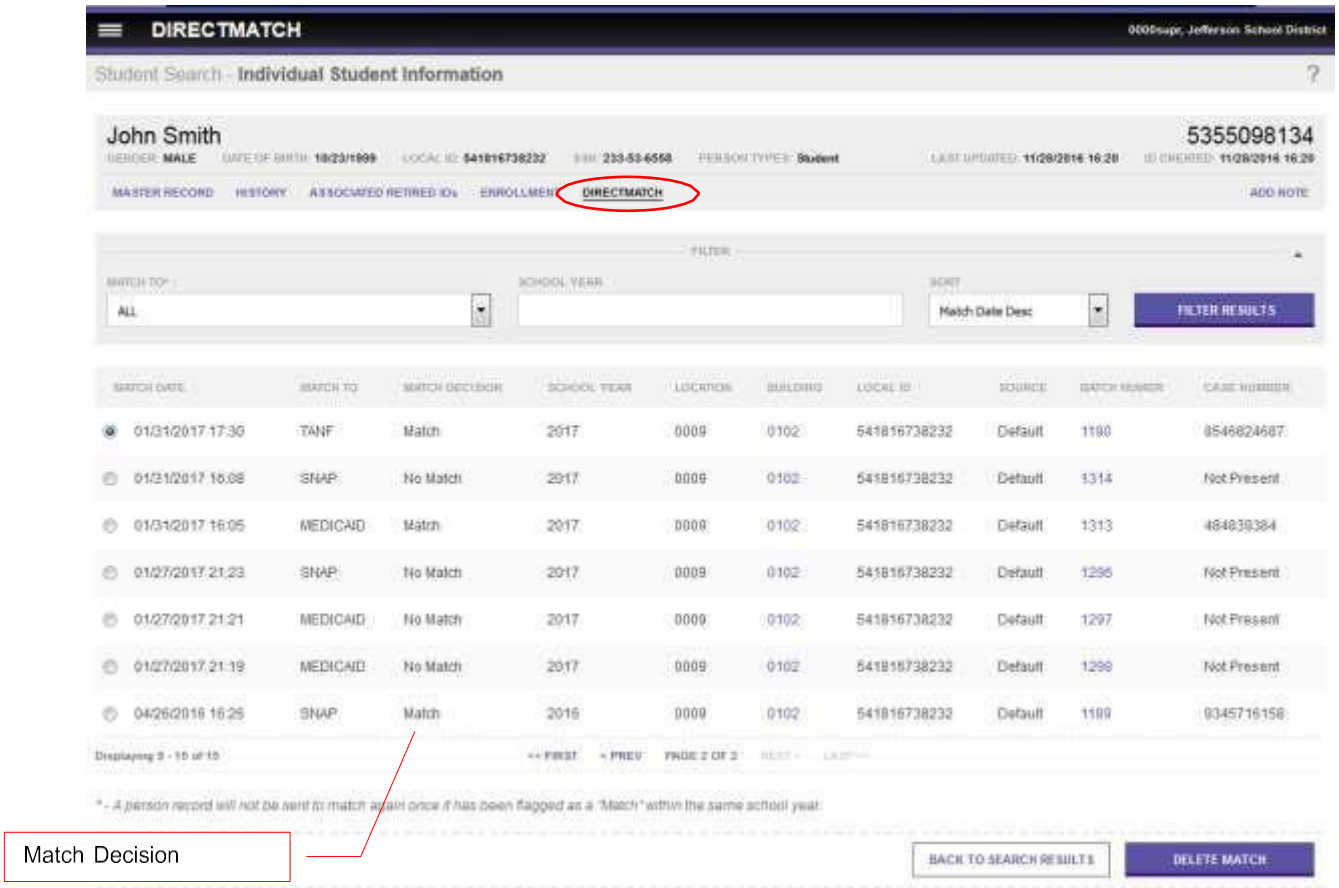
Viewing DirectMatch results

The purpose of this feature is to allow authorized users to view DirectMatch results to an existing Master Student Record.

Steps

On the ***Student Search – Individual Student Information*** page, to view a math/no match decision, a user should perform the following steps:

1. Click on the **DirectMatch** tab link.
2. The page will display all of the DirectMatch decisions for all batches for the student, regardless of LEA and school year.



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

Editing DirectMatch Results

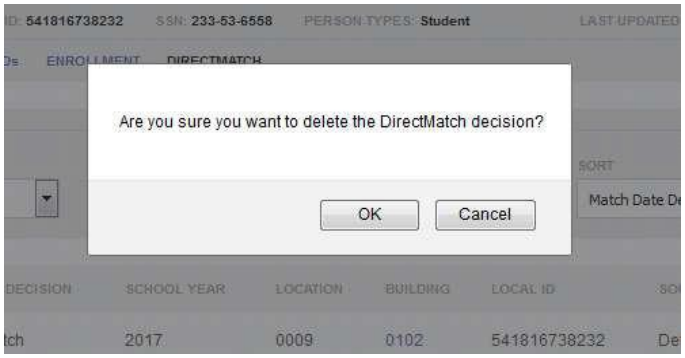
The purpose of this feature is to allow authorized users to delete DirectMatch results to an existing Master Student Record through the User Interface. This feature may not be available for all users.

> **NOTE:** Users can only edit DirectMatch results that belong to their own LEA. Additionally, only current school year DirectMatch results can be edited when the School Year validation is enabled.

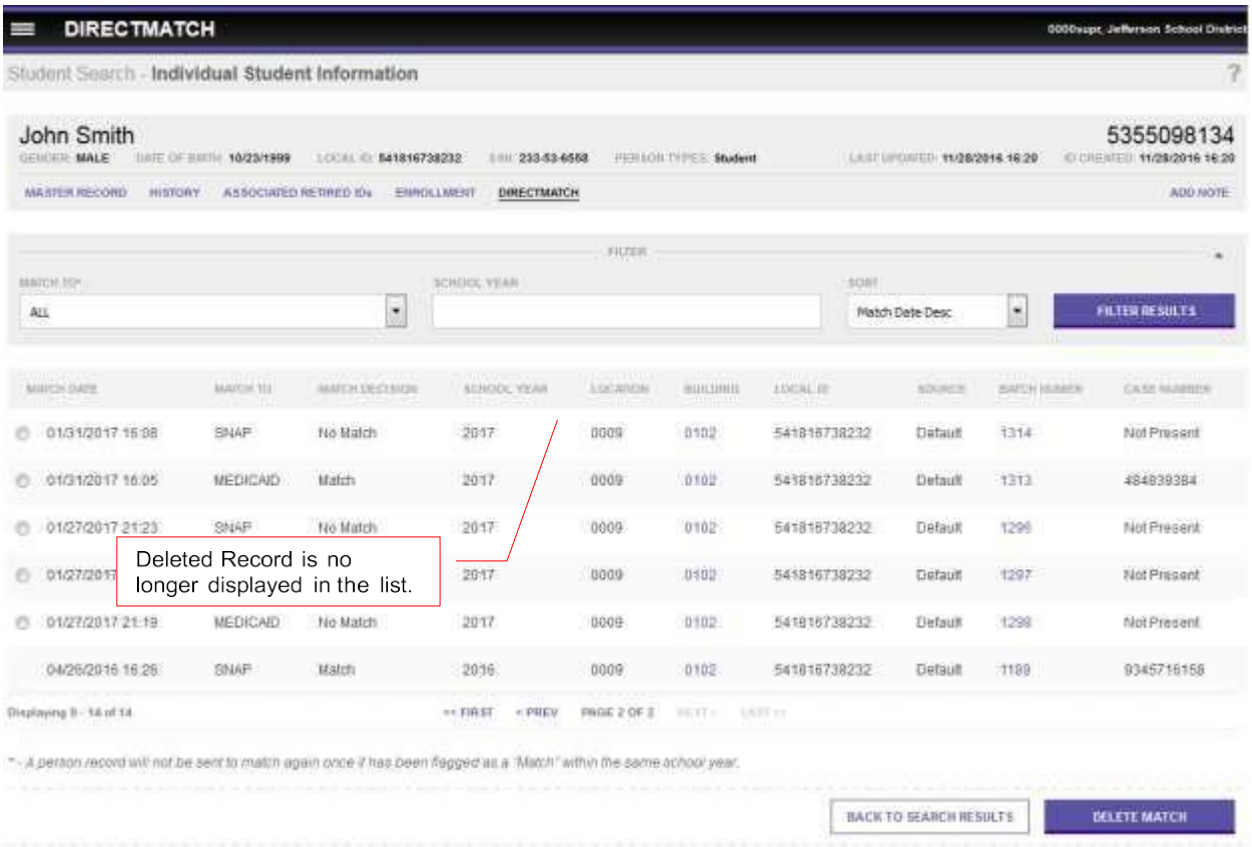
Steps

To edit a DirectMatch decision from the **Student Search** component, a user should perform the following steps:

1. Follow steps 1-2 above.
2. Select the radio button for the DirectMatch result you want to delete.
3. Click the DELETE MATCH button. A confirmation pop-up will display asking the user to confirm the requested action.



4. Click **OK**.
5. The DirectMatch page will reload and the deleted match decision will no longer appear in the results through the user interface.

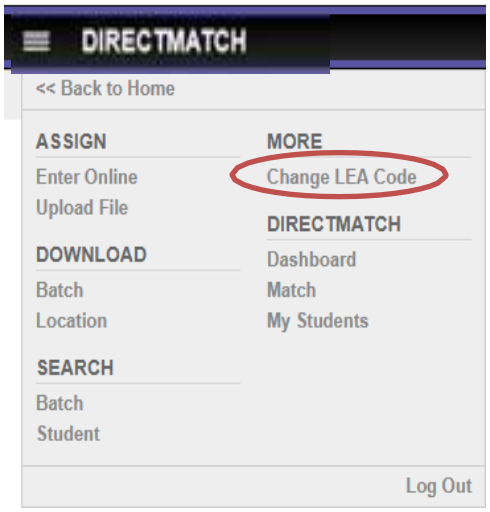


NOTE: Deleted Matches are audited and maintained in the database

NOTE: A student record will not be sent to match again once it has been flagged as a "Match" within the same school year if the System Administrator has enabled the "Exclude Previous Match Records" property

NOTE: The SNAP Recipient ID will only be present for records with a "Match" determination under the Match Decision column.

CHANGE LEA Code



About Change LEA Code

Users can change their current LEA by clicking the **Change LEA Code** link under **MORE** in the Main Menu:

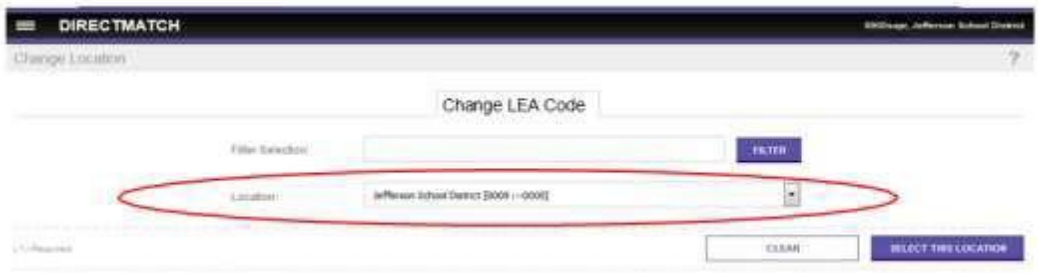
This feature allows users with access to multiple LEAs to change the current LEA reference or search for a LEA.

This component is enabled / disabled per role within the Administrative components section in Security Manager. It is typically available to the Multi District user roles who are authorized to work with more than one LEA

Changing a LEA Selection

Steps

The application requires users to access DirectMatch to work with one LEA at a time. A user's current LEA will be displayed after logging into the application. For those users who have access to two or more LEAs, the **Change LEA Code** module allows them to switch between LEAs for uploads/student entry. To change LEAs, users should perform the following steps:



1. Select a district from the LEA Code dropdown list to change the current district.
2. Click the **SELECT THIS LEA CODE** button.

Searching for a LEA

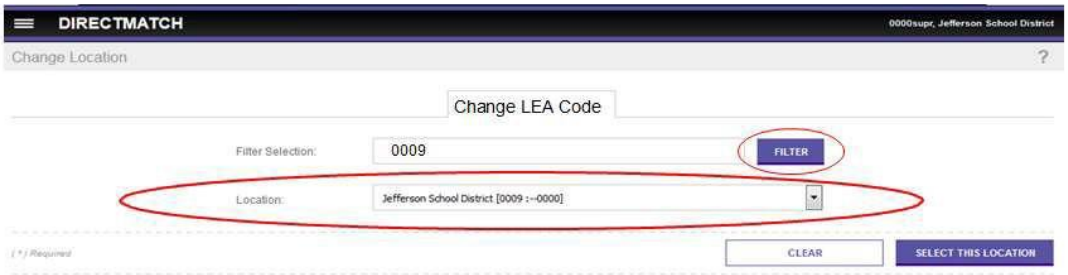
Steps

For users with access to multiple LEAs, users should perform the following steps to search for a LEA:

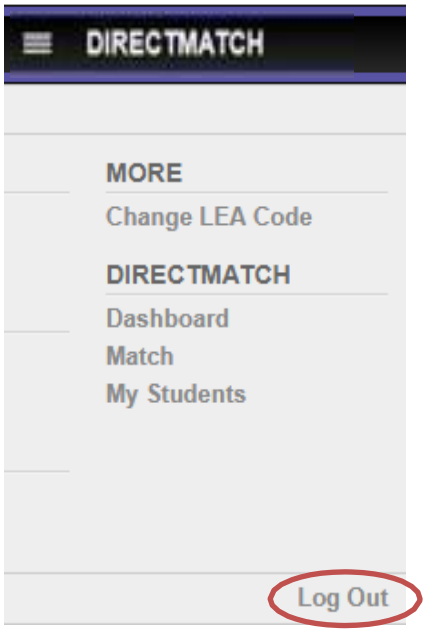
1. Enter the LEA name or the LEA code in the **Filter Selection**: textbox on the ***Change LEA Code*** page. Partial LEA names or LEA codes can be used for right truncation searches.

   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 LEAs that match the search criteria.



LOGGING OUT



The **Log Out** link on the Main Menu allows users to log out 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 exit the application.

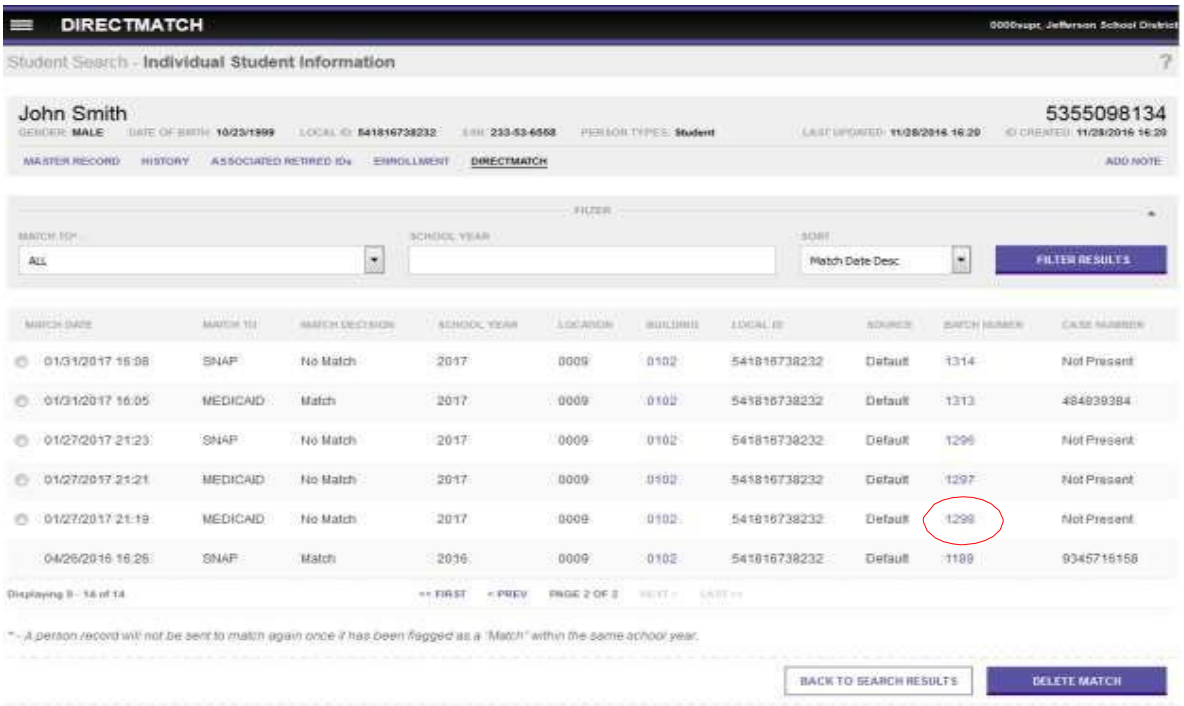
If the Log Out link is not clicked, the application will also automatically exit the application after inactivity in the Browser. This is enforced for security purposes.

Revision History:

• August 2019:
  ○ 2019-20 1.0 Version for the new school year
• September 2019:
  ○ 2019-20 2.0 Version
  ▪ Added frequently asked questions	

APPENDIX A: BATCH INFO Window

Throughout the DirectMatch application and in 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 Information*** window that pops up contains four sections/tabs:

1. STATISTICS Tab
2. PROCESSING Tab
3. DOWNLOADS Tab
4. GENERAL Tab

STATISTICS Tab

Selecting the **Statistics** tab will display where submission records are within the DirectMatch Process:

Batch Information: **Batch 1298**

STATISTICS | PROCESSING | DOWNLOADS | GENERAL

MATCH / NO MATCH	
Match	2711
No Match	121139

CANCELED	
Canceled - During data validation stage	6

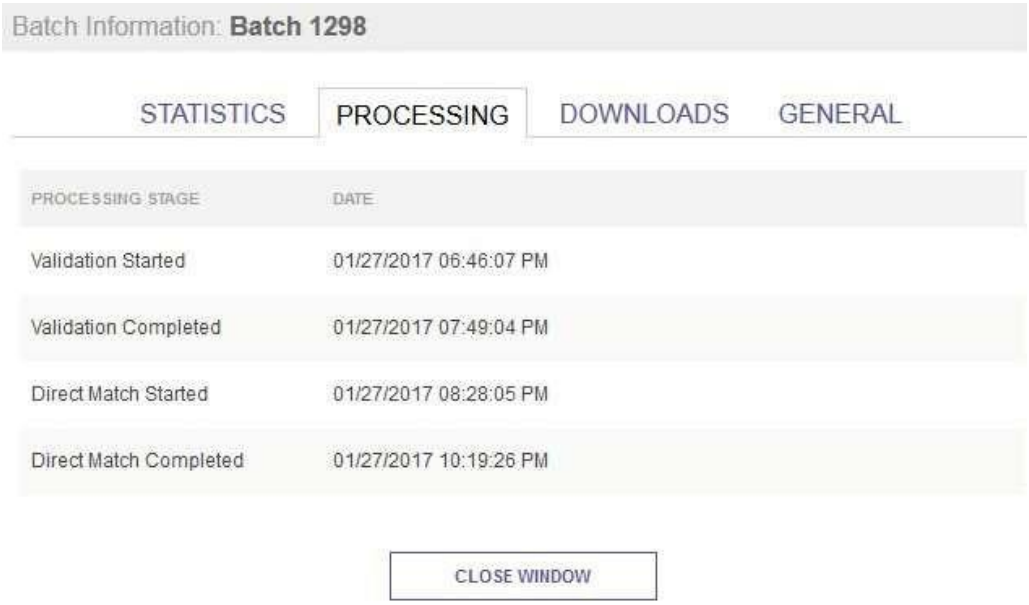
READY TO RESOLVE NEAR MATCHES	
Near Match pending resolution	73

CLOSE WINDOW

Records will be grouped by status and Match process stage. Please see APPENDIX C: RECORD CANCELLATION ERROR MESSAGES for a list of all statuses and their groupings.

PROCESSING Tab

Selecting the **Processing** tab will display a timeline of each step in the Match Process:



Each step except for the Submission and Data Validation steps will contain a start date/time and an end date/time.

DOWNLOADS Tab

Selecting the **Download** tab will display information about who downloaded extract files for a specific batch and when each download occurred. Each time a user downloads and extract files for a particular batch, a new entry will appear in the list.

GENERAL Tab

Selecting the **General** tab will display basic information about a batch:

Batch Information: **Batch 1298**

STATISTICS PROCESSING DOWNLOADS GENERAL

BATCH NUMBER	1298
SUBMISSION TYPE	UID
BATCH STATUS	Near Matches / Duplicates Found
LEA CODE	009
SCHOOL/SITE CODE	009010
EXTRACT DATE	N/A
EXTRACT FILE	DirectMatch
TRANSMISSION ID	N/A
CREATION USER ID	Jklsdiop11
CREATION DATE	01/27/2017
TOTAL RECORDS	123929
RECORD DELIMITER	0x2C
HEADER DELIMITER	0x09
FILE VERSION	3.0
SOURCE SYSTEM	SIS

CLOSE WINDOW

APPENDIX B: ID RECORD STATUS MESSAGES

Below is a list of all possible status messages that an individual student submission record can have. A record status indicates exactly where in the DirectMatch process a particular record is. Included in the list are the **Status Title**, a **Description**, and the **Grouping** for the particular record. The actual **Status Titles** can be found in the application whenever a user clicks the Batch Info link in the "**BATCH INFO"** column. The **Code** listed below is not displayed.

Code	Status Message for Records in Stage (used in output file)
01	Ready to Validate Data
02	Pending Match results/submission
05	No Match
06	Near Match pending resolution
07	No Match - Selected during Match Resolution stage
08	Match - Selected during Match Resolution stage
09	Canceled – Selected during Match Resolution stage
10	Invalid
11	Match
13	Canceled – During Data Validation Stage
19	Canceled – During Data Validation Stage
52	Canceled During Data Validation Stage – SSN is not allowed
20	Canceled – Schedule/Admin
161	User is not authorized to submit student for the specified district
162	User is not authorized to submit student for the specified school

APPENDIX C: RECORD CANCELLATION 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 an invalid date
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 required
Gender is not valid.(XXXinvalid valueXXX)
Grade Level is not present
Grade Level is not valid.(XXXinvalid valueXXX)
LAST NAME required
Last Name is not valid.(XXXinvalid valueXXX)
LOCAL ID required
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)

Canceled Record Comments (*cont.)*
Record Type is not present.
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.

APPENDIX D: Louisiana Secure ID v3.0 File Upload & Download Formats

File Name

The filenames of the Student Batch File can contain upper/lower case alphanumeric characters, periods, underscores, or hyphens. Spaces and any other special characters are not allowed.

Record Types

The Student Batch File should contain three different categories of information. The three categories of records are:

- Header Record
- Detail Record
- Trailer Record

The Header and Trailer record should be delimited by a single tab or space character. The Trailer should have no empty spaces or data after the last Trailer column.

HEADER RECORD LAYOUT

The header record should always be the first record.

Each of the fields should be delimited in the header by the field name referenced below. The header record contains the following fields

Field Name	Delimiter	Required	Data Type	Notes/Format Details
Record Type		Yes	Char (2)	Always 'TH'.
Extract Date		Yes	Date (10)	Can be in one of the following formats: • mm/dd/yyyy • m/d/yyyy • mm/d/yyyy • m/dd/yyyy
Extract Time		Yes	Time (8)	Must have a 'hh:mm:ss' format.
Transmission ID		Yes	VarChar (10)	This number can be utilized by the submitter for auditing as an identifier for the submission.
Version		Yes	Char (3)	Always '3.0'
Delimiter	delimiter=	Yes	VarChar (4)	Should be the character literal or the hex representation of the delimiter that is used in the detail records (either tab or comma). For a comma delimiter, the character literal would be 'delimiter=,' and the hex representation would be 'delimiter=0X2C'. For a tab delimiter, it is recommended that the hex representation be used. In that case, it would be 'delimiter=0X09'.

Field Name	Delimiter	Required	Data Type	Notes/Format Details
Source Name	source=	Yes	VarChar (3)	This should be a valid source system name. Batches will fail if the source name is not defined as a in the Source System table. System administrators manage the Source System table. Examples: SIS = Local student information system (most common) SER = Local special education system
Text Qualifier	qualifier=	No		Should be the text or the hex representation of the text qualifier that is used in the detail records. (Double Quote only)
Batch Indicator	batch_indicator=	No		The system will accept D for batch level indicator. D indicates an LEA Level File.

TRAILER RECORD LAYOUT

The Trailer record should always be the last record in the file.

The Trailer record **should be delimited** by a single tab or space character and there should be no extra spaces or data after the last column in the Trailer Record.

The Trailer record contains the following fields:

Field Name	Required	Data Type	Notes/Format Details
Record Type	Yes	Char (2)	Always 'TT'.
Transmission ID	Yes	VarChar (10)	An arbitrary number. Should match the Transmission ID in the header record.
Number of Records	Yes	VarChar (10)	Number of records in the file, including the 'TH' and 'TT' records. The value should be left aligned and not have any trailing spaces.

Detail Record Layout

The detail records should appear between the header and trailer records. Each of the fields should be delimited even if data is not available for certain fields.

These records should represent individual student data and should contain the following fields:

#	Field Name	Required	System - Data type	Used for Matching	Notes/FormatDetails
1	**Record Type**	Yes	Char(2)	n/a	Always 'ID'.
2	**School/Site Code**	Yes	Char(6)	No	School the student attended for this enrollment. A student may have multiple enrollment records with different sites in the same school year. In SIS, the Demographic record should reflect the current/most recent site for a given LEA.
3	**Residing District Code**	No	Char(2)	No	This is the 2-digit parish/city code of the public School District (attendance zone) in which student lives or if student is enrolled in a residential school, the School District in which the legal guardian lives (01-69). **This field is required for certain types of public/charter schools who are required to submit address records (type=120), as defined in the SIS User Guide.**
4	**Last Name**	Yes	VarChar(60)	Yes	**Full** legal last name of the person.
5	**First Name**	Yes	VarChar(60)	Yes	**Full** legal first name of the person.
6	**Middle Name**	No	VarChar(60)	Yes	**Full** legal middle name of the person. **For Direct Match:** First initial ONLY
7	**Name Suffix**	No	VarChar(10)	No	Name suffix to be one of the following values: Jr, Sr, and roman numerals I – XV, Esq.
8	**Gender**	Yes	Char(1)	Yes	Gender must be one of the following values: **M** - Male, **F** - Female.
9	**Date of Birth**	Yes	VarChar(10)	Yes	Can be in one of the following formats: • mm/dd/yyyy • m/d/yyyy • mm/d/yyyy • m/dd/yyyy • yyyy-mm-dd

#	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 9th 01 – Grade 1 2 – Grade 2 3 – Grade 3 4 – Grade 4 5 – Grade 5 6 – Grade 6 PK2 07 – Grade 7 08 – Grade 8 09 – Grade 9 T9 – Transitional 10 – Grade 10 11 – Grade 11 12 – Grade 12 15 – SPED Infants (Ages Birth – 2) -or- Nonpublic PK1 or 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.**
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 Example: White= NNNNNY Black= NNNYNN

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 that falls within that timeframe uses the ending year. Example: School year 7/1/2017 - 6/30/18 results in Ending school session year of **2018.**
17	**Alternate Last Name**	No	VarChar(60)	Yes/No	This field should be used for the birth surname, alternate last name, or former last name of the student. Blank submissions are ignored if an Alternate Last Name was previously submitted. To clear an Alternate Last Name, the word NULL in all capital letters must be supplied during submission for this field.
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 Match To Record.
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.

#	Field Name	Required	System - Data type	Used for Matching	Notes/FormatDetails
22	**RESERVED**	No	VarChar(25)	No	Not Used by LDOE. Leave this field blank.
23	**RESERVED**	No	VarChar(25)	No	Not Used by LDOE. Leave this field blank.
24	**RESERVED**	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** Moved placement for 3.0	No	Varchar(25)	No	**For Uniq-ID:** Each position will define the consent flag. Position 1 = LOFSA. **For Direct Match:** This field should be blank
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

#	Field Name	Required	System - Data type	Used for Matching	Notes/FormatDetails
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
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 person type of the individual. 02 – Student
57	**Location Active Flag**	Yes	VarChar(1)	No	The current status of the individual. 0 – Inactive 1 - Active NOT USED FOR NONPUBLICS
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

#	Field Name	Required	System - Data type	Used for Matching	Notes/FormatDetails
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.**
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.**

File Format v3.0 DirectMatch Download Extract Templates

Once a student submission file has been processed by *DirectMatch*, users can download the results by selecting an extract template.

DM Index Extract Template for DirectMatch Download File

This is the default

- The **DM Index** file can be used to **upload to local Food Service systems.**
- Each record in this extract includes certain fields from the student submission record along with the SNAP Direct Certification record (if there was a match for the student).
- The file is similar to the *DCF01 Direct Certification Match file* previously created for Public and Charter schools and the SNAP match file previously created for Nonpublic schools.
- **DM Index files cannot be used for data submission.**

Field Name	Data type	Notes/FormatDetails
Record Type	Char(2)	Always 'ID'.
State ID/Unique ID	Char(10)	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.
Student Local ID	Char(9)	ID used in the local Student Information System.
Student Local ID Source **LEA Code**	VarChar(60) Char(3)	The source system name associated with the Student's Local ID (e.g. SIS, SER, SCH, TDR, SCS, OneAppID, Legacy ID, Archdiocese506, Diocese500, Nonpublic, etc.) LEA Code assigned by LDOE.
School/Site Code	Char(6)	Site Code assigned by LDOE.
Ending School Session Year	Char(4)	Must be in the 'YYYY' format. Example: 8/8/2017 results in ending school year of **2018.**
Match to Type	Char(2)	The Match to Type field is used in the *Direct Match* process to output the Match Type of the Match to Record SNAP
Record Status	VarChar(255)	This field is the internal transaction status result for the record and is provided in the output file.
For a **NO MATCH** record,	VarChar(255)	*"No Match – No DM Index record available for extract"*
For a MATCH record, includes all 23 fields from the ***SNAP Direct Certification Record (see below).***		
Recipient SSN	Char (9)	
Recipient Last Name	Char (15)	
Recipient First Name	Char (9)	
Recipient Middle Name	Char (1)	*Middle Initial*
Recipient Date of Birth	Char (8)	*Format: YYYYMMDD*
Household ID (SSN)	Char (9)	
Household Name	Char (25)	String household name
Parish Code	Char (2)	01-64 for the 64 Louisiana parishes

Mailing Address Street 1	Char (25)	
Mailing Address Street 2	Char (25)	
Mailing Address City	Char (20)	
Mailing Address State	Char (2)	
Mailing Address ZIP	Char (5)	
Residence Address Street 1	Char (25)	
Residence Address Street 2	Char (25)	
Residence Address City	Char (20)	
Residence Address State	Char (2)	
Residence Address ZIP	Char (5)	
Recipient Ethnicity	Char (1)	*{1-Hispanic; 2-non-Hispanic }*
Recipient Gender	Char (1)	*{ M-Male; F-Female }*
Recipient Race	Char (1)	*{ 1-White; 2-Native Hawaiian/Pacific Islander; 3-American Indian/Alaskan; 4-Asian; 5-Black or African/American }*
SNAP Recipient ID	Char (9)	DCFS Generated Unique ID for each SNAP recipient
SNAP File Date	Char (8)	*Format: YYYYMMDD*

File Format 3.0+ Template for DirectMatch Download File

- This file can be used for **Food and Nutrition Audits.**
- Contains a header record, trailer record and each detail record includes all 78 fields from the v3.0 Upload format layout (see pages 63-70 for field descriptions) and all 23 fields from the SNAP Direct Certification record (if there was a match for the student).
- File Format 3.0+ files cannot be used for data submission.

Field Name	**Data type**	**Notes/Format Details**
Contains all 78 fields from the **v3.0 Upload format student submission record (See pages 63-70)**		
*For a **NO MATCH** record*	VarChar(255)	*"No Match – No DM Index record available for extract"*
*For a **MATCH** record, includes all 23 fields from the **SNAP Direct Certification Record (see below).***		
Recipient SSN	Char (9)	
Recipient Last Name	Char (15)	
Recipient First Name	Char (9)	
Recipient Middle Name	Char (1)	*Middle Initial*
Recipient Date of Birth	Char (8)	*Format: YYYYMMDD*
Household ID (SSN)	Char (9)	
Household Name	Char (25)	String household name
Parish Code	Char (2)	01-64 for the 64 Louisiana parishes

Mailing Address Street 1	Char (25)	
Mailing Address Street 2	Char (25)	
Mailing Address City	Char (20)	
Mailing Address State	Char (2)	
Mailing Address ZIP	Char (5)	
Residence Address Street 1	Char (25)	
Residence Address Street 2	Char (25)	
Residence Address City	Char (20)	
Residence Address State	Char (2)	
Residence Address ZIP	Char (5)	
Recipient Ethnicity	Char (1)	*{1-Hispanic; 2-non-Hispanic}*
Recipient Gender	Char (1)	*{M-Male; F-Female}*
Recipient Race	Char (1)	*{1-White; 2-Native Hawaiian/Pacific Islander; 3-American Indian/Alaskan; 4-Asian; 5-Black or African/American}*
SNAP Recipient ID	Char (9)	DCFS Generated Unique ID for each SNAP recipient
SNAP File Date	Char (8)	*Format: YYYYMMDD*

File Format 3.0 Template for DirectMatch Download File

- This file can be used to **load to the local student information system.**
- Contains a header record, trailer record and each detail record includes all 78 fields from the v3.0 Upload format student submission record layout (see pages 69-76 for field descriptions).

In addition to selecting an extract template for a download, users can also request the type of records to be included in the download file:

- MATCH/NO MATCH – Includes records for all students having either a MATCH decision or a NO MATCH decision.
- MATCH – Includes records for students having a MATCH decision ***This is the default***
- CANCELED – An additional download option, includes records for students that were canceled and for which a match or no match decision was not made. These students must be resubmitted to DirectMatch at a later time. This type of download file is always created using the **File Format 3.0** extract template.
- NO MATCH – An additional download option, includes records for students having a NO MATCH decision.

DirectMatch Cross District Reporting for some LEAs

Please see the guidance and options below for running DirectMatch across districts.

SCENARIO	DirectMatch Process
Scenario 2 • LEA is the food service provider for other LEA(s) who **do not** have the same 3-digit Sponsor Code as the LEA. • LEA **does not** report their SIS student data • LEA **does not** report their eScholar student data. ***For example:*** LEA OPSB (036) provides lunch services for LEA Crescent Leadership Academy (361001)	**Option 1** The Other LEA has ***DirectMatch District*** access • Other LEA runs DirectMatch for their students. • Other LEA downloads match results (DM Index) for loading to their Food service provider LEA 's Food Service system • Other LEA downloads match results (FF 3.0) and loads to their local system for reporting student lunch status to SIS. **Option 2** **Food service provider LEA** has ***DirectMatch School*** access The Other LEA has *DirectMatch* ***District*** **access** • Food service provider LEA runs DirectMatch. • Food service provider LEA downloads match results (DM Index) for loading to their Food Service system • The Other LEA downloads match results (FF 3.0) and loads to their local system for reporting student lunch status to SIS.

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DirectMatch Cross District Reporting for some LEAs

Please see the guidance and options below for running DirectMatch across districts.

SCENARIO	DirectMatch Process
Scenario 1 • LEA **does not** provide lunch services for certain school(s) who have the same 3-digit Sponsor Code as the LEA. • **LEA** reports the school's eScholar student data to Scholar *Uniq-ID* • **LEA** reports the school's student data to SIS *For example:* LEA OPSB (036) does not provide lunch services for School 036193 Cypress Academy	**Option 1:** **LEA** has ***DirectMatch District*** access • **LEA** runs DirectMatch for all students in their **Sponsor Code**. • **LEA** downloads match results (DM Index) for loading to each school provider's Food Service system. • **LEA** downloads match results (FF 3.0) for reporting student lunch status to SIS for all schools. **Option 2:** **LEA** has ***DirectMatch District*** access **School** has ***DirectMatch School*** access • **LEA** runs DirectMatch for all students in their **Sponsor Code** but cancels records in the Near Match queue for students in those schools (by specific **Site Code**) • **School** runs DirectMatch for their students • **School** downloads match results (DM Index) for loading to their provider's Food Service system. • **School** or **LEA** downloads match results (FF 3.0) for reporting the school's student lunch status to SIS.

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APPENDIX F: Frequently asked Questions

1. Who is responsible for accessing eScholar DirectMatch and what are the access types?
   - A decision must be made at the LEA level by collaborating with your Superintendent, Security Coordinator, Food Service Supervisor and Data Coordinator to determine the access types and responsibility for running the Uniq-ID and DirectMatch applications.

2. How do I get an eScholar User ID/Password?
   - Publics/Charters contact your LEA Security Coordinator
   - Nonpublics contact ldedata@la.gov

3. Security Coordinators who need assistance should email ldedata@la.gov

4. When logged in, will I be logged out after a certain time?
   - Yes, there is an idle time limit before getting logged off of eScholar.
   - A user can simply log back in to resume their processing.
   - Logging in or out does not affect the batch validation time or process.

5. How often should DirectMatch be run?
   - Can be run as needed for individual students (e.g. new students)
     Suggested to run monthly for all students with a previous NO MATCH decision in order to get updated results based on the most current SNAP file loaded monthly to DirectMatch. Refer to SNAP Monthly Schedule.

6. We are a nonpublic school and we do not currently use eScholar, how can we get SNAP match extract files?
   - A batch upload file can be created using eScholar file format v 3.0 and submitted to *DirectMatch*.
   - If you or your vendor need a copy of the file layout, please email us at SystemSupport@la.gov

7. How long will submission files and match results be available in eScholar?
   - At a minimum all batches will be available for the entire school year
   - A Batch Update Log should be maintained by the LEA.

8. How can I get notification when the SNAP file is available?
   - In order to get notification you must register on CNP website **cnp.doe.lousiana.gov**
   - Please refer to the instructions listed in the *CNP Registration for SNAP Update Notifications* document.

9. What happens if I miss a month running DirectMatch?
    - If you miss running DirectMatch for a previous month, you should run DirectMatch as soon as possible. You will not be able to go back and run for a prior month only. You would be running against all of the months that have been loaded to DirectMatch to date. For example if you run DirectMatch on September 20th, for the first time, you would be matching against the June, July, and August SNAP files.

10. Can a batch file be deleted?
    - No, a batch file cannot be deleted.

11. Who can I contact for assistance with formatting my DirectMatch batch upload file?
    - Contact louisianasecureID@escholar.com for assistance.

12. Do I need to resolve the same matched student each time I run DirectMatch?
    - If you are uploading a batch file, you must resolve all near matches each time the students are submitted to DirectMatch.
    - If you are sourcing data from Uniq-ID to DirectMatch, only the students who were a prior NO MATCH will be sourced to DirectMatch. If a student was previously a MATCH, this student will not be sourced and you will not have to resolve a near match for the student.

13. What is the process for starting off a new school year?

For new school year startup:

- The eScholar systems Uniq-ID and DirectMatch databases are emptied of all student enrollments and SNAP matches from the prior school year.
- The first SNAP file for a new school year will contain recipient data as of **June 30th** and this file is loaded to the DirectMatch system after the rollover.
- The CNP staff will need to work with the district's eScholar data manager to coordinate the DirectMatch and Uniq-ID updates for the new school Year. The district's eScholar data manager must first submit student information for all of the students expected to enroll so Uniq-ID assignments can be made for the upcoming school year. Once the district's eScholar data manager has submitted the expected enrollments to Uniq-ID, the CNP staff can run DirectMatch to match those enrollments against SNAP.

    Failure to submit the expected enrollments to Uniq-ID prior to running DirectMatch will result in zero or significantly fewer SNAP matches.

During the school year, as your district eScholar data manager submits additional enrollment updates to Uniq-ID (new students, other changes in enrollment, etc.), additional runs of DirectMatch should be made by the CNP staff.

DirectMatch should be run each time a new monthly SNAP file has been loaded to DirectMatch. Please refer to the SNAP Monthly Load Schedule for the current school year.