



eScholar®

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User Guide

eScholar Staff-ID®

2025-2026

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ABOUT THE APPLICATION

Purpose

The eScholar Staff-ID® (StaffID) application is designed for educational agencies to assign and maintain unique statewide staff identifiers (also referred to as “unique identifiers”). The term “person” is inclusive of all school district personnel categories.

Capabilities

The StaffID application allows users to:

- **Assign a unique identifier** for every school district personnel in Louisiana regardless of type of work performed.
- **Generate random StaffIDs** that are not constructed on any staff demographic details of the staff.
- **Identify and locate a staff from the statewide StaffID database** either using the staff SSN, Alias ID, staff demographics (e.g., last name), or with a batch file.
- **Download unique identifiers** by batch or by location.
- **Search** by batch, agency name, or staff name.
- **Multiple ways to submit staff records** to the StaffID application via batch mode, manual entry, Web Services, SIF, or Automatic File Processing.

Benefits

The StaffID application provides users with numerous benefits including:

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

System Requirements

The application will utilize Adobe Acrobat and Microsoft Excel for reports that users can download. Users can download Adobe Acrobat from <http://get.adobe.com/reader/>. Microsoft eScholar StaffID User Guide5Last Revised: July 17, 2024

Excel or an Excel reader can be used.

ABOUT THIS MANUAL

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

Screenshots

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

Notes & Tips

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



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



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

Definitions, Acronyms, and Abbreviations

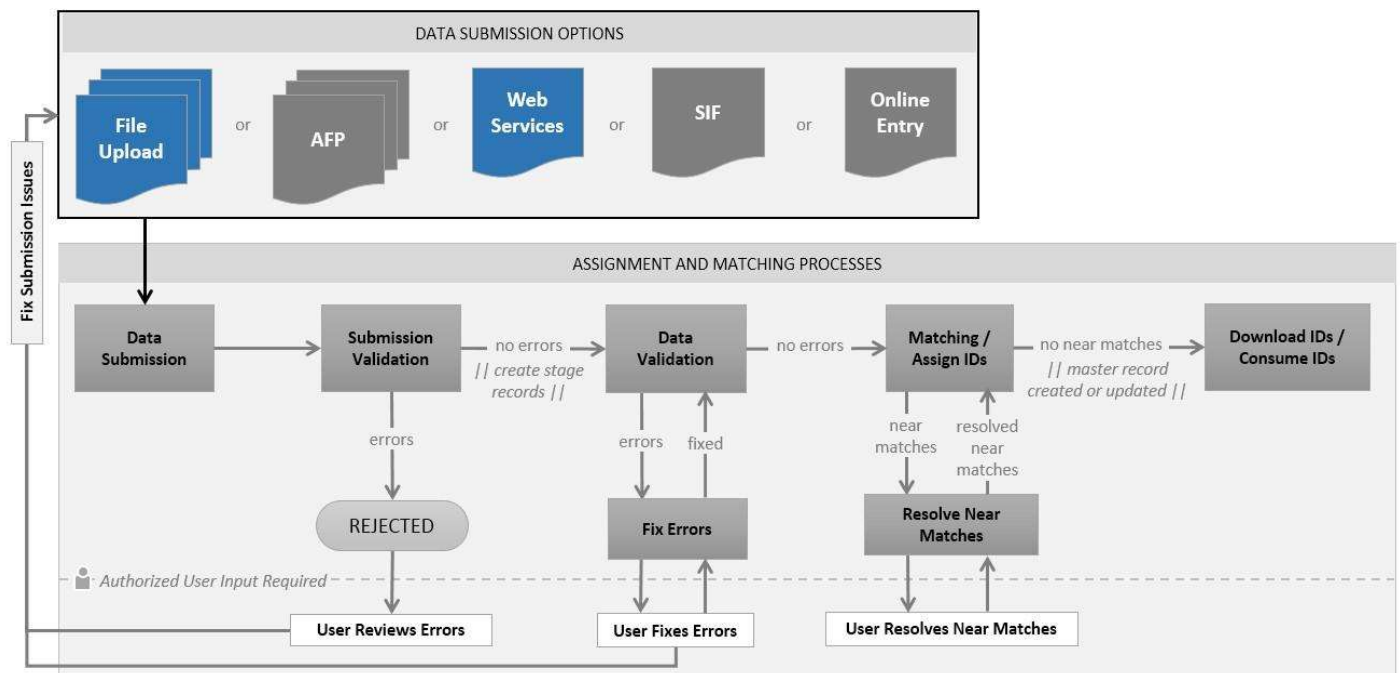
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- **StaffID** – The internal staff identifier generated by the eScholar Staff-ID® application.
- **Local Person ID** – The identifier that is created by the school district local systems.
- **ID Assignment Process** – The StaffID application’s process of assigning IDs to staff records. This process includes the following steps:
 1. submitting a batch
 2. validating the data
 3. fixing data errors
 4. assigning IDs
 5. resolving near matches/matches
 6. downloading IDs
- **Match Probability** – The probability that two staff records are the same person.
 - < 85% is a no match
 - 85% - 93% is a near match
 - > 93% is a match
- **eScholar Staff-ID®** – The StaffID abbreviation is used throughout the application.
- **Assign Selected** – This button is available within the Near Match pages. The label on the button may vary by application. It may also be labeled Match.
- **Create New ID** – This button is available within the Near Match pages. The label on the button may vary by application. It may also be labeled No Match.
- **CDF** – This is used throughout the document to reference Customer Defined Fields.
- **AFP** – This is used throughout the document to reference Automatic File Processing.
- **Master Data** – This is the active record for the staff and includes the ID and all of the latest data.
- **History Record** – When a master record is updated, the original data is moved to history and the new data becomes the master data. The application retains all history information for the staff. Typically, data is updated when a record is submitted, unless the Authoritative Source feature is enabled. Please see Authoritative Source below.
- **Authoritative Source** – The application includes an Authoritative Source feature that impacts whether or not the master record is updated when a Match is found. If the submitting source has authority to update the master records, the master records will be updated and the original master record will be moved to history. If the submitting source does not have authority to update the master records, the master record will not be updated.

ID ASSIGNMENT PROCESS OVERVIEW

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

- **Step 1:** [SUBMIT STAFF DATA, VALIDATE SUBMISSION, and FIX DATA ERRORS](#) (select link for more information)
- **Step 2:** [ASSIGN IDs](#) (select link for more information)
- **Step 3:** [RESOLVE NEAR MATCHES](#) (select link for more information)
- **Step 4:** [DOWNLOAD IDs](#) (select link for more information)



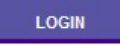
Fix Errors can be disabled so users are required to fix errors in the source.

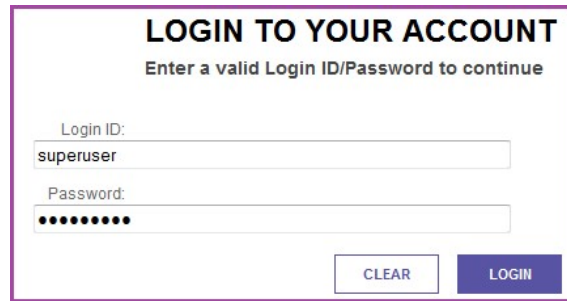
LOG IN

eScholar StaffID URL: <https://louisianastaffid.escholar.com/uid/login.do>

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

The steps to log into the application include:

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



LOGIN TO YOUR ACCOUNT
Enter a valid Login ID/Password to continue

Login ID:
superuser

Password:
••••••••



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

eScholar User Accounts

Security coordinators – contact LDEData@la.gov for your eScholar access and to reset your password.

District users – contact your security coordinator for eScholar access and to reset your password.

Security Coordinators

Security coordinators will use the [eScholar StaffID user administration portal](#) to add/remove users and to reset passwords for users within their district.

Here are the instructions for security coordinators: [StaffID-Security Coordinator Add a User](#)

Contact eScholar


Please contact LouisianaSecureID@escholar.com if you have questions regarding:

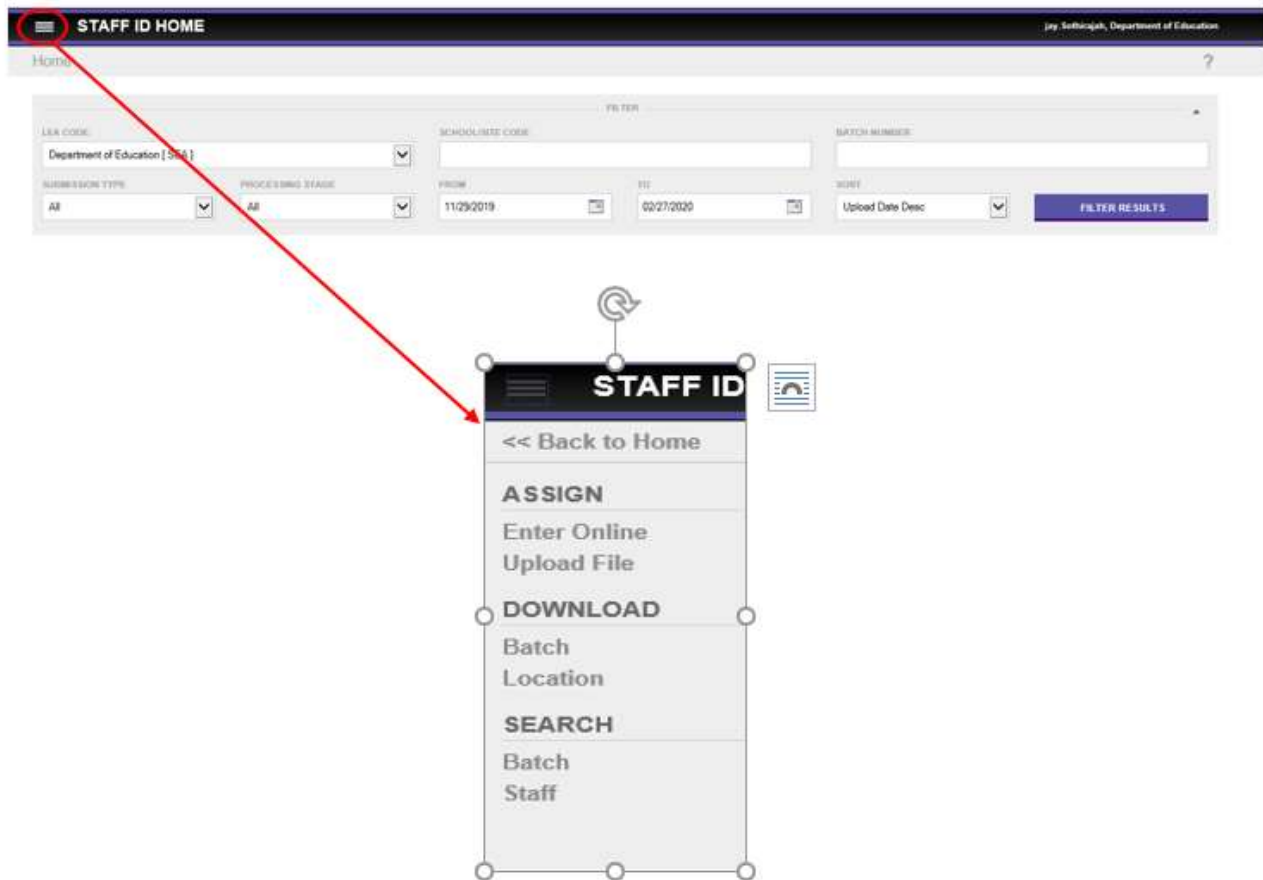
- Access to eScholar FTP, Credentials folders, IBCs, and HiSet folders
 - eScholar FTP: <https://louisianasecureftp.escholar.com/WebInterface/login.html>
- Software bugs (system outage, security issues, etc.)
- Administrative functions such as system settings and configurations

- File format/upload questions
- Requests for utilizing web services

MAIN MENU & FEATURES OF THE APPLICATION

Main Menu

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



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



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


FEATURES

The core features that are included in the StaffID application, which can all be accessed from the Main Menu, are outlined below.

HEADER *(select link for more information)*

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

HOME PAGE *(select link for more information)*

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

ASSIGN

ENTER ONLINE *(select link for more information)*

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

UPLOAD FILE *(select link for more information)*

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

DOWNLOAD

BATCH *(select link for more information)*

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

- IDs Assigned
- Errors to Fix *(Not enabled in Louisiana’s eScholar application)*
- Near Matches/Duplicates to Resolve
- Canceled
- Rejected
- Fixed Records *(Not enabled in Louisiana’s eScholar application)*
- Near Match Details

LOCATION *(select link for more information)*

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

SEARCH

STAFF *(select link for more information)*

This feature allows a user to search for staff records through an online interface. This function can be used to verify the details of a staff already in the StaffID application.



NOTE: *Depending on the needs of the specific implementation, the word “Person” may have been configured by your organization to be displayed as something other than “Person”. For instance, the word “Person” may have been changed to be displayed as “Staff” throughout the application, in which case, instead of this feature being*

BATCH *(select link for more information)*

This feature allows a user to search for staff records with a batch file.

LOG OUT *(select link for more information)*

This link allows users to log out of the application. By using the Log Out link, all sessions for the user are closed.

HEADER

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

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

Application Name

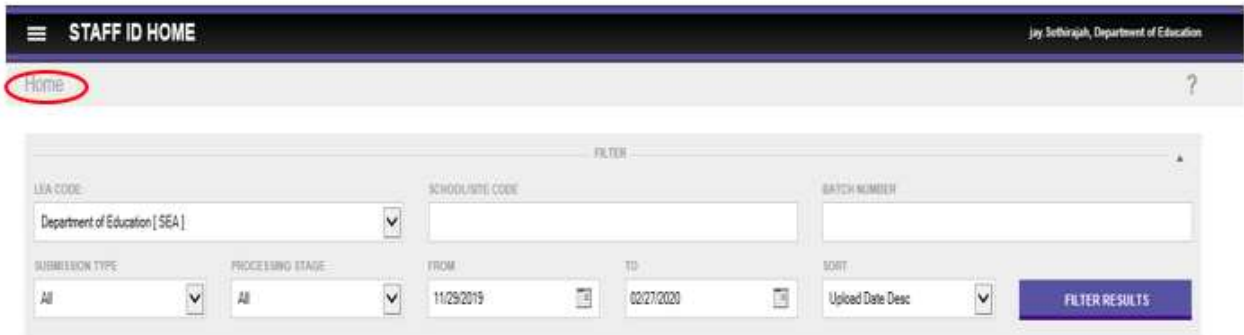
The Application Name is displayed on every page next to the Main Menu link. This Application Name is the name that your organization has decided to call the StaffID application.



The screenshot shows the top header of the application. On the left, there is a hamburger menu icon followed by the text "STAFF ID HOME", which is circled in red. On the right side of the header, the text "Jay Sethirajah, Department of Education" is displayed. Below the header, the word "Home" is visible on the left and a question mark icon on the right. The main content area contains a filter form with fields for LEA CODE (set to "Department of Education [SEA]"), SCHOOL/SITE CODE, BATCH NUMBER, SUBMISSION TYPE (set to "All"), PROCESSING STAGE (set to "All"), FROM (set to "11/29/2019"), TO (set to "02/27/2020"), and SORT (set to "Upload Date Desc"). A "FILTER RESULTS" button is located at the bottom right of the filter form.

Page Name

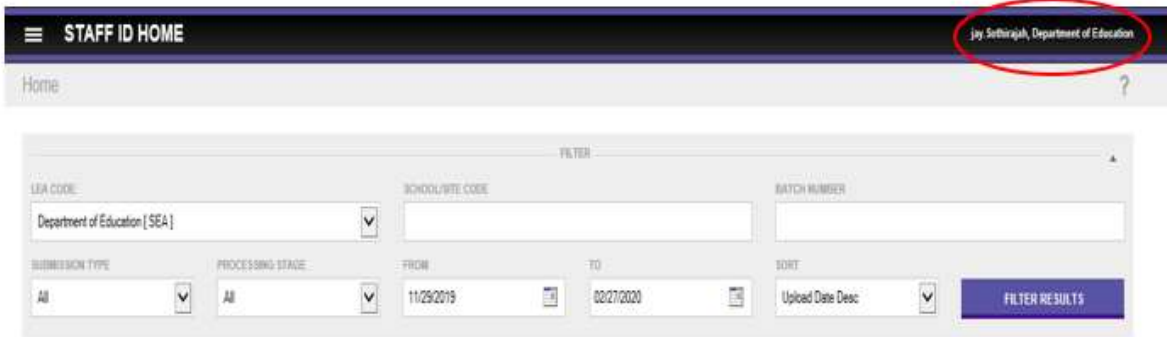
The Page Name is displayed on every page under the Main Menu link and the Application Name.



The screenshot shows the top header of the application. On the left, there is a hamburger menu icon followed by the text "STAFF ID HOME". On the right side of the header, the text "Jay Sethirajah, Department of Education" is displayed. Below the header, the word "Home" is circled in red. The main content area contains a filter form with fields for LEA CODE (set to "Department of Education [SEA]"), SCHOOL/SITE CODE, BATCH NUMBER, SUBMISSION TYPE (set to "All"), PROCESSING STAGE (set to "All"), FROM (set to "11/29/2019"), TO (set to "02/27/2020"), and SORT (set to "Upload Date Desc"). A "FILTER RESULTS" button is located at the bottom right of the filter form.

Current Location

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



The screenshot shows the top navigation bar of the 'STAFF ID HOME' page. On the right side of the bar, the text 'Jay Sethirajah, Department of Education' is displayed and circled in red. Below the navigation bar is a 'Home' breadcrumb and a help icon (?). The main content area features a 'FILTER' section with several input fields: 'LEA CODE' (set to 'Department of Education [SEA]'), 'SCHOOL/SITE CODE', 'BATCH NUMBER', 'SUBMISSION TYPE' (set to 'All'), 'PROCESSING STAGE' (set to 'All'), 'FROM' (set to '11/29/2019'), 'TO' (set to '02/27/2020'), and 'SORT' (set to 'Upload Date Desc'). A 'FILTER RESULTS' button is located at the bottom right of the filter section.

Getting Help


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



This screenshot is identical to the one above, showing the 'STAFF ID HOME' page with the same filter options. However, the help icon (?) in the top right corner is circled in red, indicating its location relative to the current location text.

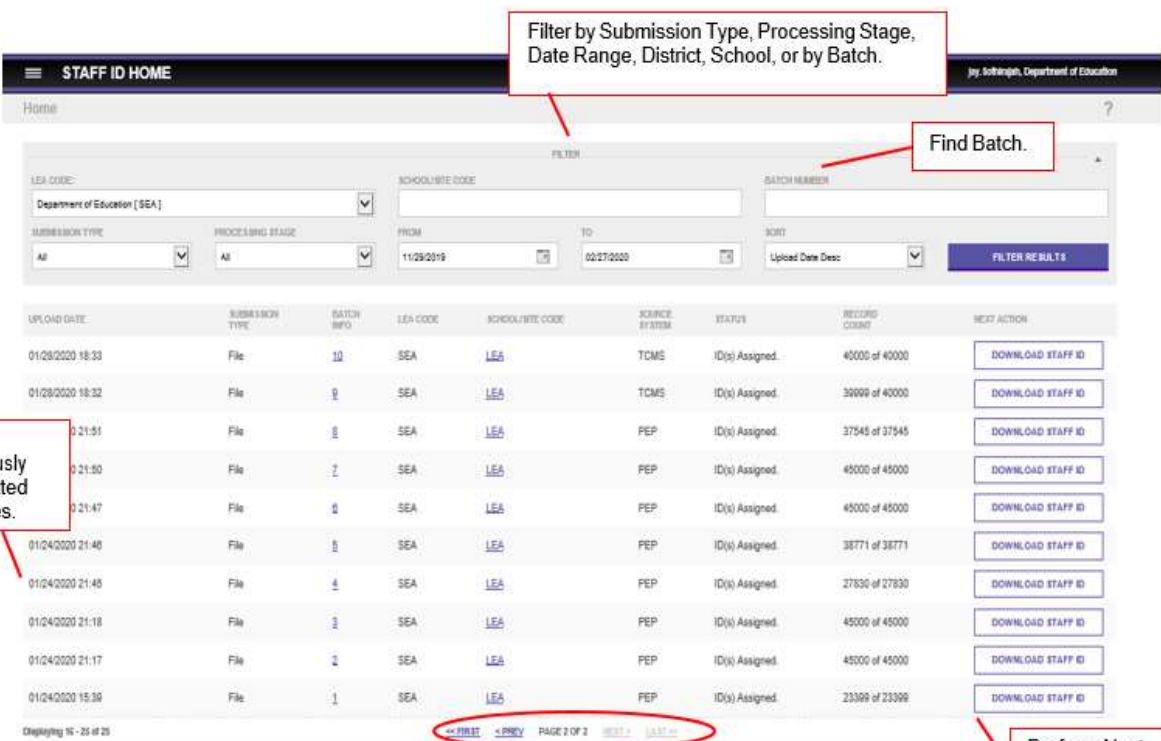
HOME PAGE

About the Home Page

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

The Home Page allows users to:

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



The screenshot shows the StaffID Home Page interface. At the top, there is a navigation bar with the text "STAFF ID HOME" and a user profile "jpy. Solbrig@nj.gov, Department of Education". Below the navigation bar is a "Home" link and a search icon. The main content area features a "FILTER" section with several dropdown menus and input fields for filtering batches. A callout box points to this section with the text "Filter by Submission Type, Processing Stage, Date Range, District, School, or by Batch." Below the filter section is a "Find Batch" search bar. The main part of the page is a table with columns: UPLOAD DATE, SUBMISSION TYPE, BATCH INFO, LEA CODE, SCHOOL/SITE CODE, SOURCE SYSTEM, STATUS, RECORD COUNT, and NEXT ACTION. The table contains 15 rows of data. A callout box points to the first row with the text "View previously submitted batches." At the bottom of the table, there is a pagination control with buttons for "FIRST", "PREV", "PAGE 7 OF 2", "NEXT", and "LAST". A callout box points to these buttons with the text "Perform Next Action steps."



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

Viewing Previously Submitted Batches

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

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	LEA CODE	SCHOOL/SITE CODE	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
01/28/2020 18:33	File	10	SEA	LEA	TCMS	ID(s) Assigned.	40000 of 40000	DOWNLOAD STAFF ID
01/28/2020 18:32	File	9	SEA	LEA	TCMS	ID(s) Assigned.	39009 of 40000	DOWNLOAD STAFF ID
01/24/2020 21:51	File	8	SEA	LEA	PEP	ID(s) Assigned.	37545 of 37545	DOWNLOAD STAFF ID
01/24/2020 21:50	File	7	SEA	LEA	PEP	ID(s) Assigned.	45000 of 45000	DOWNLOAD STAFF ID
01/24/2020 21:47	File	6	SEA	LEA	PEP	ID(s) Assigned.	45000 of 45000	DOWNLOAD STAFF ID
01/24/2020 21:46	File	5	SEA	LEA	PEP	ID(s) Assigned.	38771 of 38771	DOWNLOAD STAFF ID
01/24/2020 21:45	File	4	SEA	LEA	PEP	ID(s) Assigned.	27830 of 27830	DOWNLOAD STAFF ID
01/24/2020 21:18	File	3	SEA	LEA	PEP	ID(s) Assigned.	45000 of 45000	DOWNLOAD STAFF ID
01/24/2020 21:17	File	2	SEA	LEA	PEP	ID(s) Assigned.	45000 of 45000	DOWNLOAD STAFF ID
01/24/2020 15:30	File	1	SEA	LEA	PEP	ID(s) Assigned.	23399 of 23399	DOWNLOAD STAFF ID

A link that provides a pop-up with batch information. This is referred to the "Batch Info" link throughout this document.

The current **Status** of the submission

The number of records to be addressed in the next action

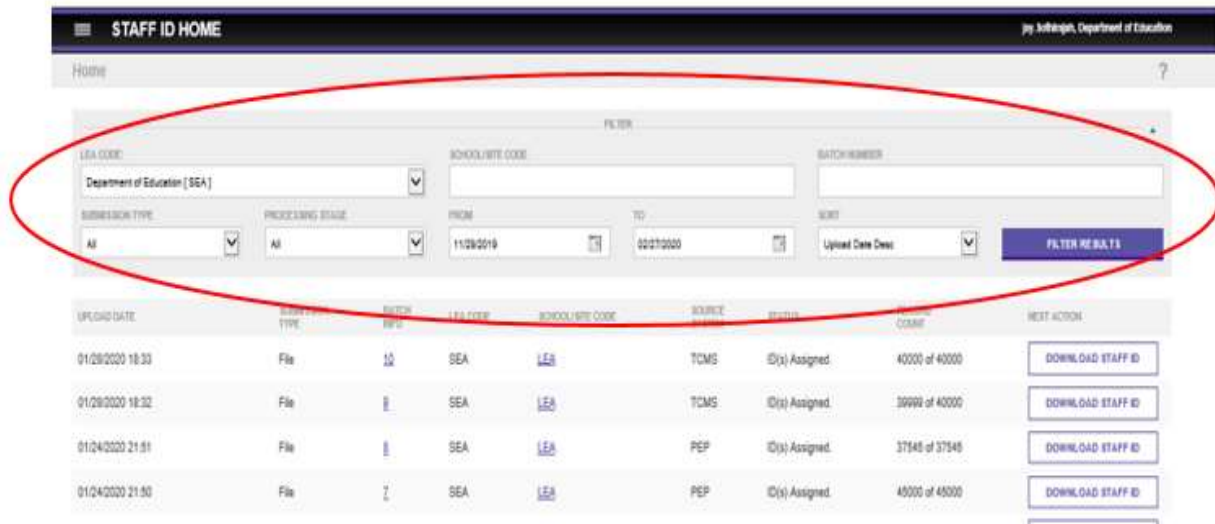
Buttons to initiate the next action. They are dependent on the next action expected.

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



Filtering Batches

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



The screenshot shows the 'STAFF ID HOME' interface. A red oval highlights the 'FILTER' section, which contains the following fields:

- LEA CODE: Department of Education [SEA]
- SCHOOL/SITE CODE: [Empty]
- BATCH NUMBER: [Empty]
- SUBMISSION TYPE: All
- PROCESSING STAGE: All
- FROM: 11/29/2019
- TO: 02/27/2020
- SORT: Upload Date Desc
- FILTER RESULTS button

Below the filter section is a table with the following data:

UPLOAD DATE	BATCH TYPE	BATCH #	LEA CODE	SCHOOL/SITE CODE	SOURCE	STATUS	COUNT	NEXT ACTION
01/29/2020 18:33	File	10	SEA	LEA	TCMS	ID(x) Assigned	40000 of 40000	DOWNLOAD STAFF ID
01/29/2020 18:32	File	1	SEA	LEA	TCMS	ID(x) Assigned	39999 of 40000	DOWNLOAD STAFF ID
01/24/2020 21:51	File	1	SEA	LEA	PEP	ID(x) Assigned	37345 of 37345	DOWNLOAD STAFF ID
01/24/2020 21:50	File	2	SEA	LEA	PEP	ID(x) Assigned	45000 of 45000	DOWNLOAD STAFF ID

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



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

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

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

Results from Filtering

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

The screenshot shows the 'STAFF ID HOME' interface. The header includes a menu icon, 'STAFF ID HOME', and the user 'jay. Sothirajah, Department of Education'. Below the header is a search bar with 'Home' and a help icon. The main content area is titled 'FILTER' and contains several input fields: 'LEA CODE' (Department of Education [SEA]), 'SCHOOL/SITE CODE', 'BATCH NUMBER', 'SUBMISSION TYPE' (All), 'PROCESSING STAGE' (Resolve Near Matches), 'FROM' (11/29/2019), 'TO' (02/27/2020), and 'SORT' (Upload Date Desc). A 'FILTER RESULTS' button is present. Below the filters is a table with the following columns: 'UPLOAD DATE', 'SUBMISSION TYPE', 'BATCH INFO', 'LEA CODE', 'SCHOOL/SITE CODE', 'SOURCE SYSTEM', 'STATUS', 'RECORD COUNT', and 'NEXT ACTION'. Two rows are visible, both with a status of 'Near Matches / Duplicates Found' and a 'RESOLVE NEAR MATCHES' button. The first row has an upload date of 02/27/2020 16:51, submission type 'File', batch info '27', LEA code 'SEA', school/site code 'LEA', source system 'PEP', and record count '6 of 407'. The second row has an upload date of 02/20/2020 15:06, submission type 'File', batch info '24', LEA code 'SEA', school/site code 'LEA', source system 'PEP', and record count '348 of 643'. At the bottom, there is a pagination bar showing 'Displaying 1 - 2 of 2' and navigation links: '<< FIRST', '< PREV', 'PAGE 1 OF 1', 'NEXT >', and 'LAST >>'.

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

The screenshot shows the 'STAFF ID HOME' interface. The header includes a home icon, the text 'STAFF ID HOME', and the user 'Jay Sullivan, Department of Education'. Below the header is a 'Home' link and a question mark icon. The main area contains a 'FILTER' section with the following fields: 'DISTRICT' (set to 'Alertown School District [900]'), 'SCHOOL' (empty), 'BATCH NUMBER' (empty), 'SUBMISSION TYPE' (set to 'All'), 'PROCESSING STAGE' (set to 'Canceled'), 'FROM' (set to '02/16/2015'), 'TO' (set to '03/19/2015'), and 'SORT' (set to 'Upload Date Desc'). A 'FILTER RESULTS' button is located to the right of the filter fields. Below the filter section is a table header with columns: 'UPLOAD DATE', 'SUBMISSION TYPE', 'BATCH INFO', 'DISTRICT', 'SCHOOL', 'SOURCE SYSTEM', 'STATUS', 'RECORD COUNT', and 'NEXT ACTION'. The message 'No Batches Found' is displayed in the center of the table area and is circled in red.

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

The screenshot shows the 'STAFF ID HOME' interface. The header includes a home icon, the text 'STAFF ID HOME', and the user 'Jay Sullivan, Department of Education'. Below the header is a 'Home' link and a question mark icon. The main area contains a 'FILTER' section with the following fields: 'DISTRICT' (set to 'Springfield School District [800]'), 'SCHOOL' (empty), 'BATCH NUMBER' (empty), 'SUBMISSION TYPE' (set to 'All'), 'PROCESSING STAGE' (set to 'All'), 'FROM' (set to '02/16/2015'), 'TO' (set to '03/19/2015'), and 'SORT' (set to 'Upload Date Desc'). A 'FILTER RESULTS' button is located to the right of the filter fields. Below the filter section is a table header with columns: 'UPLOAD DATE', 'SUBMISSION TYPE', 'BATCH INFO', 'DISTRICT', 'SCHOOL', 'SOURCE SYSTEM', 'STATUS', 'RECORD COUNT', and 'NEXT ACTION'. The message 'You are not authorized to see this batch.' is displayed in the center of the table area and is circled in red.

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

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

Next Actions Buttons

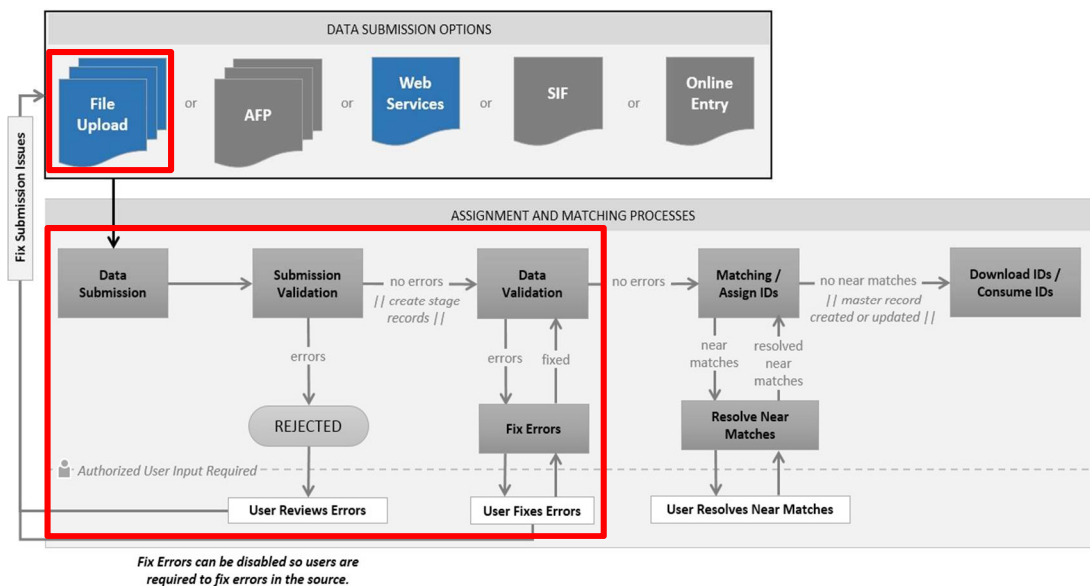
These buttons walk a user through the steps of the ID Assignment process. They will each display the next step to be completed for the particular batch and will navigate the user to the page that needs to be completed. Please see the [ID Assignment Process](#) for an overview of each step in the ID Assignment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



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

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

Assign > Upload File



About Assign by Upload File

Users can process a batch file for ID Assignment by clicking the **Upload File** link under **ASSIGN** from the Main Menu.



This feature allows users to:

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

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

Steps

eScholar StaffID User Guide24Last Revised: July 17, 2024

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

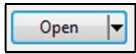
The Basic upload option requires that the input file includes a header record, staff details, and a trailer record. The input file header record defines the extraction date, import type and other file information. More details on the specific file requirements can be found in the File Format document.

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

Basic Upload:

To upload a file, users should follow these steps:

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

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

Advanced Upload

STAFF ID HOME jay. Sothirajah, Department of Education

Upload file: ?

BASIC **ADVANCED**

Template *: eScholar Uniq-ID® v3.0

File to Upload *: Choose File **BROWSE**

Delimiter *: TAB

Qualifier:

Source System:

Ignore First Row: Yes No

Multiple Agency File:

(*) Required: **UPLOAD**

1. The Upload File component will default to the “Basic” tab. Select the “Advanced” tab.
2. Select the appropriate Template. Currently the template is eScholar Staff-ID® v3.0.
3. Click **BROWSE** to view the local computer system directory structure. The file must be located on the local computer or network drive in order to upload it.
4. Browse through the directory structure and choose the directory/folder where the batch file is stored. Select the appropriate file from the local system and click the **Open** button.
5. Select the appropriate “Delimiter” for the file. The options available are:
 - Comma
 - Tab
6. Select the appropriate “Qualifier” for the file. The options available are “or”.
7. For eScholar Staff-ID® File Format v3.0, users must select a Source System.
8. Select the appropriate “Ignore First Row” option for the file. The options are “Yes” or “No”. When “Yes” is selected, the first row in the input file will be ignored during the upload processing. When “No” is selected, the first row will be included in the upload processing. When “Yes” is selected, the row is still counted in the record count provided in Batch Info, but the record is not processed.
9. If the file contains multiple agencies (Multiple Agency file), the Multiple Agency File option

must be selected.



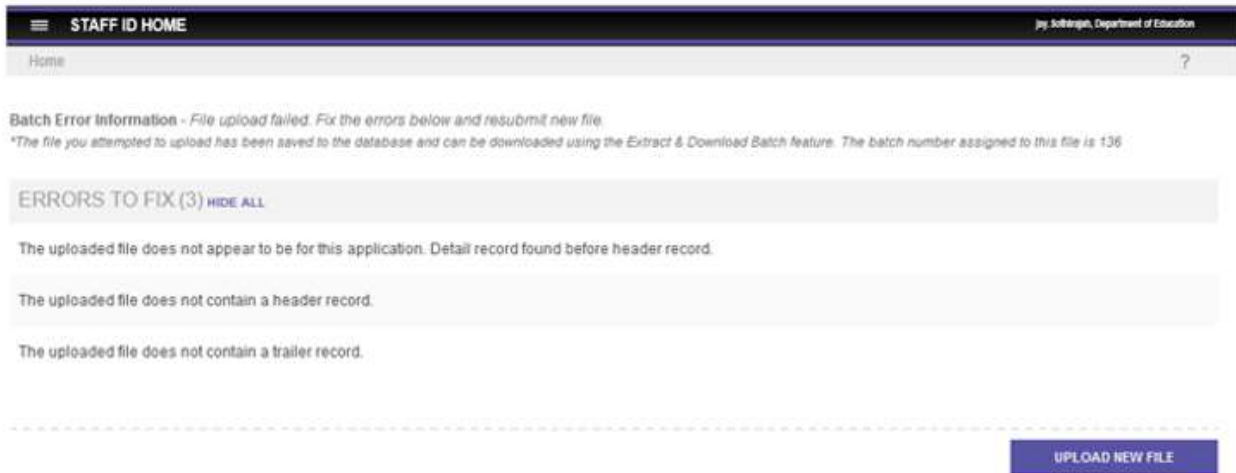
TIP: The user with authorization to multiple agencies (districts) can now upload one file which includes data for all of those agencies. The near matches created by these batches can only be resolved by the user or state administrators because the batch is created at the state-level.

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

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

File Upload Failure

If the application encounters any file errors while attempting to upload the staff 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 staff Batch Files in the database when there is a fatal file error. Users can download these files with the Download By Batch module. The above page will provide a batch number that can be used to find the file in **Download Batch**. The user can upload a new file by clicking on the button **UPLOAD NEW FILE**.

UPLOAD NEW FILE

File Upload Success

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

Batch Information

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

UPLOAD DATE	FILE NAME	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
03/19/2015 12:55:09	success.txt	File	143	900	LEA	SIS	File Uploaded. Begin Validation Stage	22 of 2	VALIDATE DATA

NOTE: With some implementations, the label on the **BATCH INFO** link displays the text “*BATCH INFO*” instead of the actual Batch Number. However, the information in the pop-up remains the same.



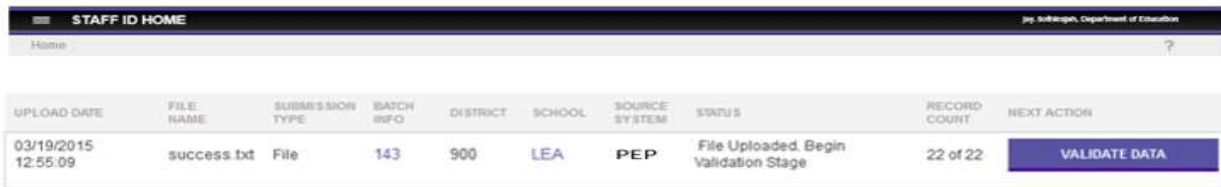
For a full explanation of the different sections/tabs of the **Batch Info** window, please see [Appendix A](#)

Validate Data

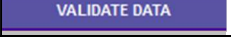
Once a file has passed file validation, the next step is data validation. This process loads the records in the file into the staging database tables, where further validation checks are performed on the data. This includes validation of valid values such as dates and codes, and user authorization for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

To validate data, users should perform the following steps:

1. Upload a batch as described above.




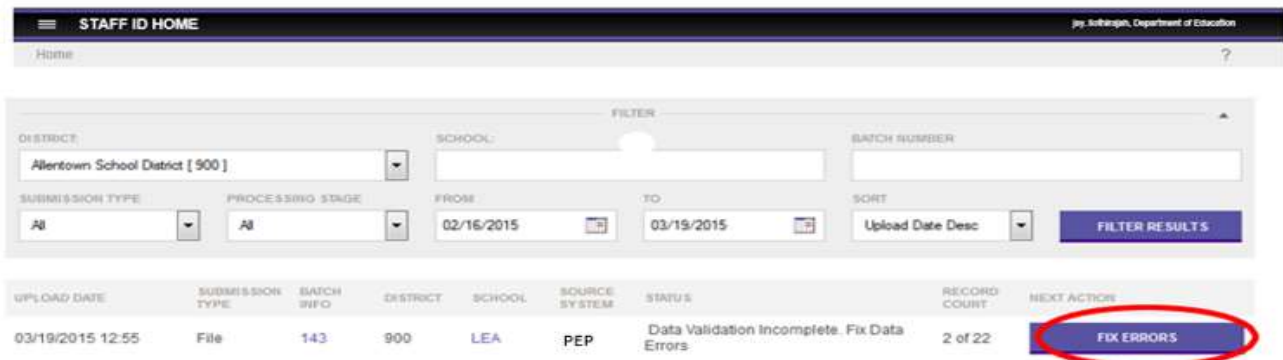
UPLOAD DATE	FILE NAME	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
03/19/2015 12:55:09	success.txt	File	143	900	LEA	PEP	File Uploaded. Begin Validation Stage	22 of 22	VALIDATE DATA

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



UPLOAD DATE	BATCH INFO	STATUS	NUMBER OF RECORDS	NEXT ACTION
03/19/2015	143	Data Validation is in progress.	In Progress	BACK TO HOME

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



UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
03/19/2015 12:55	File	143	900	LEA	PEP	Data Validation Incomplete. Fix Data Errors	2 of 22	FIX ERRORS



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



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



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

View Batch Information

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

Fix Validation Errors

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

Note: The eScholar application that Louisiana uses does not have this function. Records that failed validation are automatically canceled. Users will have to go to the Main Menu, under DOWNLOAD and select Batch. In the Extract Type box, select Canceled. Download this batch and open it either as a text file or load it into EXCEL. The errors for each record that were canceled during this data validation stage will be at the end of each record. Users will have to make the corrections in their local systems and then download a fresh file to load into eScholar Uniq-ID.

The screenshot shows the 'STAFF ID HOME' interface. At the top, there is a navigation bar with 'STAFF ID HOME' and 'my.k12la.gov, Department of Education'. Below this is a 'FILTER' section with various input fields: DISTRICT (Alertown School District [900]), SCHOOL, BATCH NUMBER, SUBMISSION TYPE (All), PROCESSING STAGE (All), FROM (02/16/2015), TO (03/19/2015), and SORT (Upload Date Desc). A 'FILTER RESULTS' button is located to the right of the filter section. Below the filter section is a table with the following columns: UPLOAD DATE, SUBMISSION TYPE, BATCH INFO, DISTRICT, SCHOOL, SOURCE SYSTEM, STATUS, RECORD, and NEXT ACTION. The table contains one row with the following data: 03/19/2015 12:55, File, 143, 900, LEA, PEP, Data Validation Incomplete. Fix Data Errors, 2 of 22, and a blue button labeled 'FIX ERRORS'. A red box highlights the '2 of 22' value in the 'RECORD' column, and a red box highlights the 'FIX ERRORS' button. A red line connects the '2 of 22' value to a text box that says 'This value represents the number of records that have data errors.'

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

Fix Errors

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

1. Click the **FIX ERRORS** button mentioned above.
2. The application will display the Fix Errors page.
3. Click the **EDIT** button or click the hyperlinked **Last Name** or **First Name** columns on the Fix Errors list page to continue the fix process.

STAFF ID HOME Jy. Killebrew, Department of Education

Fix Errors - Batch 143 ?

Select All on Page

LAST NAME	FIRST NAME	MIDDLE NAME	ALT. LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	DISTRICT	SCHOOL	LOCAL ID	NEXT ACTION
<input type="checkbox"/>	Moss	Micha	Moss			MALE	900	101	84115234917	<input type="button" value="EDIT"/>
<input type="checkbox"/>	Uribe	Anna	Uribe		06/29/1912	FEMALE	900	101	813314186351	<input type="button" value="EDIT"/>

Displaying 1 - 2 of 2

PAGE 1 OF 1

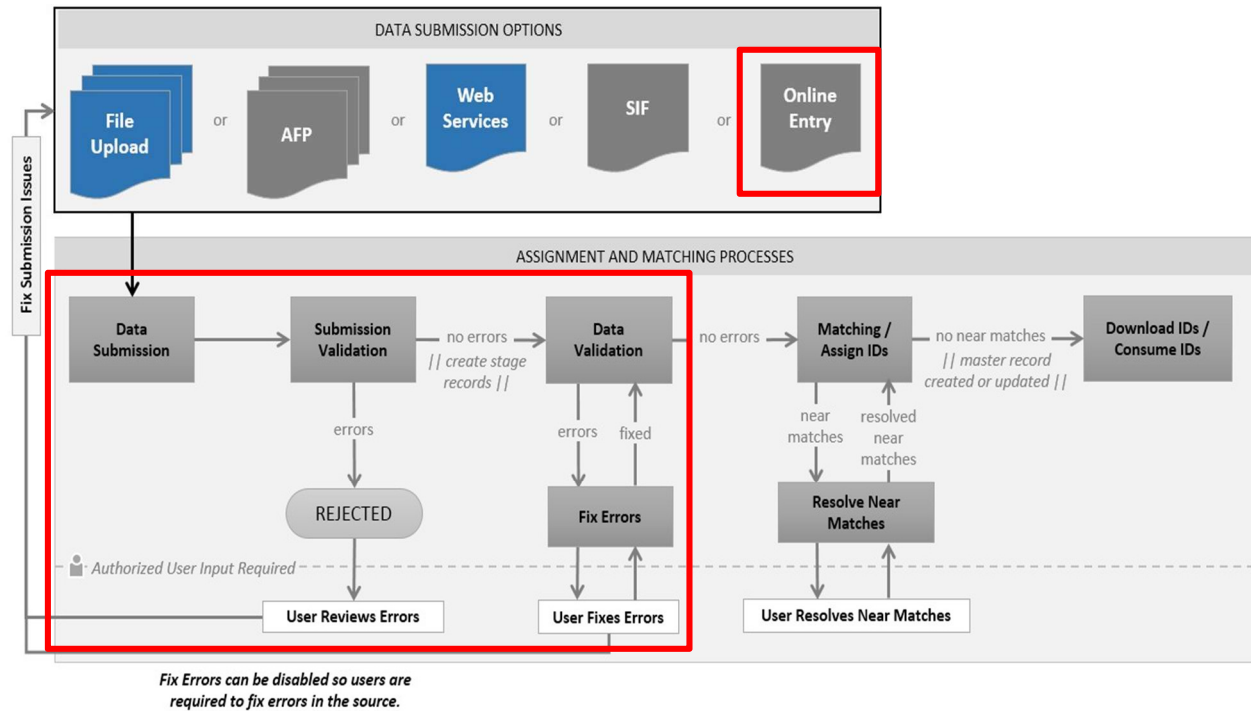
[*] Required



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

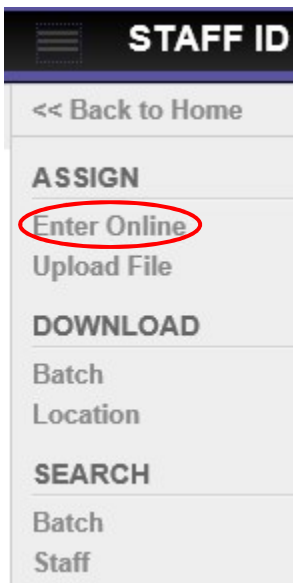
The **Fix Errors** details page will display the staff information, along with an error message directly below the error fields. In addition, a list of all the original data errors (when the record first went through data validation) will display at the bottom of the page. The information displayed on the Fix Errors page is dependent upon the Default Upload Template configuration. The eScholar Staff-ID® v3.0 is the Default Upload Template. This feature is not available for Louisiana StaffID.

Assign > Enter Online



About Assign > Enter Online

Users can submit a single staff record for ID Assignment by clicking the **Enter Online** link under **ASSIGN** from the Main Menu



This feature allows users to:

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

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

Steps

Enter Data

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

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

STAFF ID HOME AcademyLabtools, Department of Education

Enter Online - Data Entry ?

GENERAL INFORMATION

ADDRESS INFORMATION

CUSTOMER DEFINED FIELDS

LOCATION | EMPLOYMENT INFORMATION

An asterisk indicates which fields are required.

CLEAR ASSIGN STAFF ID



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.

The Enter Online page includes sections of data including:

- **General Information** – includes the basic staff information such as name, date of birth, gender, ethnicity and other demographic fields.
- **Address Information** – includes address fields such as street address, city, state and zip code.
- **Customer Defined Fields** – includes all of the Customer Defined Fields enabled within the application.

- **Additional Information** – includes fields such as alternate last name, residency status, highest degree, classification level, LEA code, local staff id, and alternate id.

- Once the form has been completed, including all required fields, click



STAFF ID HOME Anantha Lakshakula, Department of Education

Enter Online - Data Entry ?

GENERAL INFORMATION

FIRST NAME *	
MIDDLE NAME	
LAST NAME *	
ALT LAST NAME	
SUFFIX	
GENDER *	
DATE OF BIRTH*	mm / dd / yyyy
RACE/ETHNICITY *	
RACE 2 CODE	
RACE 3 CODE	
RACE 4 CODE	
RACE 5 CODE	
SSN	- - - - -
STAFF ID	
SUBMISSION PURPOSE	Assignment

ADDRESS INFORMATION

ADDRESS 1	
ADDRESS 2	
CITY	
STATE	
ZIP	

CUSTOMER DEFINED FIELDS

STATE USERID	
--------------	--

LOCATION / ENROLLMENT INFORMATION

PERSON TYPE	Staff
GRADE PLACEMENT *	
SCHOOL/SITE CODE *	
LEA CODE *	
RESIDING PARISH CODE *	
ENDING SCHOOL SESSION YEAR *	
LOCAL ID *	
SOURCE SYSTEM *	SIS
ALTERNATE ID	
ALTERNATE SOURCE	

(*) Required



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

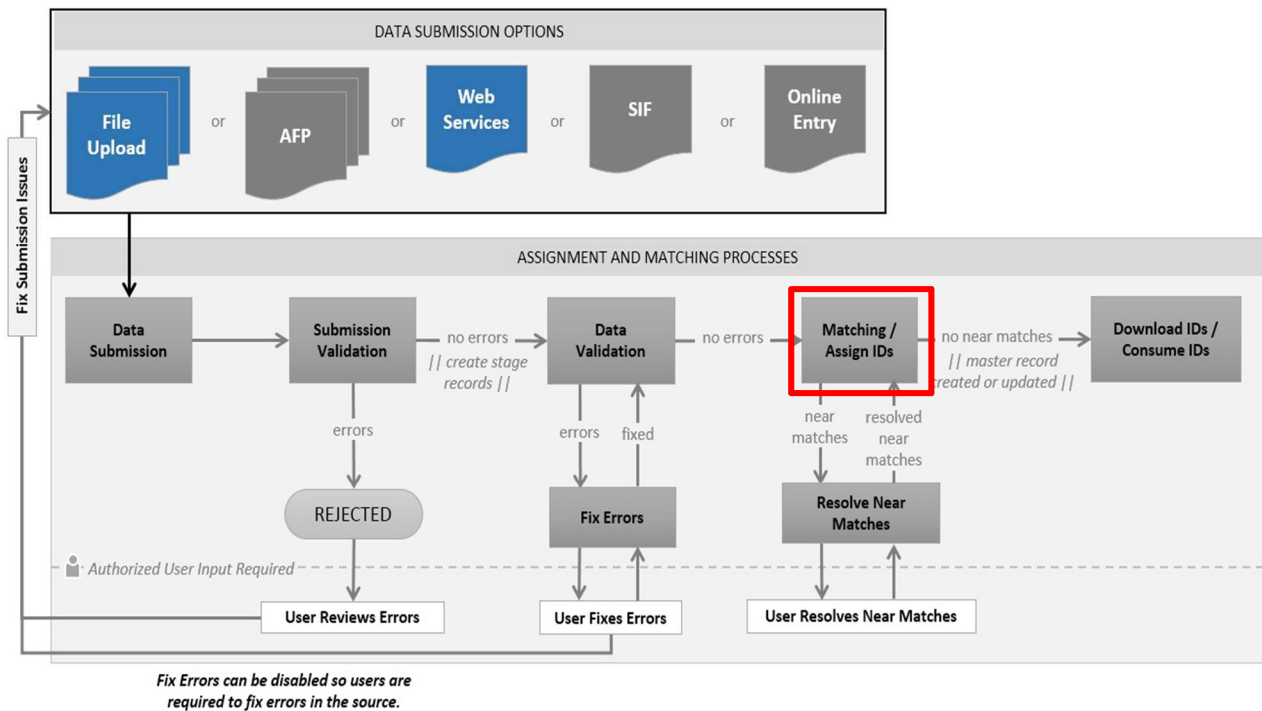
Validate and Fix Errors

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

The screenshot shows the 'STAFF ID HOME' application interface. At the top, a yellow banner displays a validation error: 'Validation Errors: DATE OF BIRTH an invalid date'. Below this, the form is divided into sections: 'GENERAL INFORMATION', 'ADDRESS INFORMATION', 'CUSTOMER DEFINED FIELDS', and 'LOCATION - ENROLLMENT INFORMATION'. The 'GENERAL INFORMATION' section contains fields for 'FIRST NAME', 'MIDDLE NAME', 'LAST NAME', 'ALIAS', 'GENDER', 'DATE OF BIRTH', 'RACE/ETHNICITY', 'RACE 1 CODE', 'RACE 2 CODE', 'RACE 3 CODE', 'RACE 4 CODE', 'SEX', 'DOB ID', and 'SUBMISSION PURPOSE'. The 'DATE OF BIRTH' field is highlighted with a red oval and shows a validation error message: 'mm / dd / yyyy'. The 'LOCATION - ENROLLMENT INFORMATION' section contains fields for 'PARISH TYPE', 'UNION PLACEMENT', 'SCHOOL DISTRICT', 'LEA CODE', 'SEA CODE', 'ASSIGNED PARISH CODE', 'ASSIGNED SCHOOL SESSION YEAR', 'LEGAL ID', 'SCHOOL DISTRICT', 'ALTERNATE ID', and 'ALTERNATE SCHOOL'. At the bottom right, there are two buttons: 'CLEAR' and 'ASSIGN STATE ID'.

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

STEP 2: ASSIGN IDs



About Assign IDs

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

STAFF ID HOME | jay.kubitz@nj.gov, Department of Education

Home

FILTER

DISTRICT: Allentown School District [500] | SCHOOL: | BATCH NUMBER: |
 SUBMISSION TYPE: All | PROCESSING STAGE: All | FROM: 02/15/2015 | TO: 03/19/2015 | SORT: Upload Date Desc | **FILTER RESULTS**

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
03/19/2015 12:55	File	143	900	LEA	SIS	Data Validation Complete. Ready to Assign Staff IDs	22 of 22	ASSIGN STAFF ID
03/19/2015 12:25	File	135	900	LEA	SIS	Near Matches / Duplicates Found	1 of 1	RESOLVE NEAR MATCHES

Steps

To assign IDs, users should perform the following steps:

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



UPLOAD DATE	BATCH INFO	STATUS	NUMBER OF RECORDS	NEXT ACTION
03/19/2015 12:55	143	ID Assignment is in progress	In Progress	BACK TO HOME

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

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

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



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

- b. If the application encounters a **Near Match**, multiple **Matches**, or any combination of both, it will mark the record as **Ready to Resolve Near Matches/Duplicates** and an ID is not assigned. These records need to be reviewed and resolved by a human.
- c. If the application finds no matching staff, it will assign a new ID. These records do not need to be reviewed.



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

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

will display a **RESOLVE NEAR MATCHES** button:

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

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

DOWNLOAD STATE ID button:

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

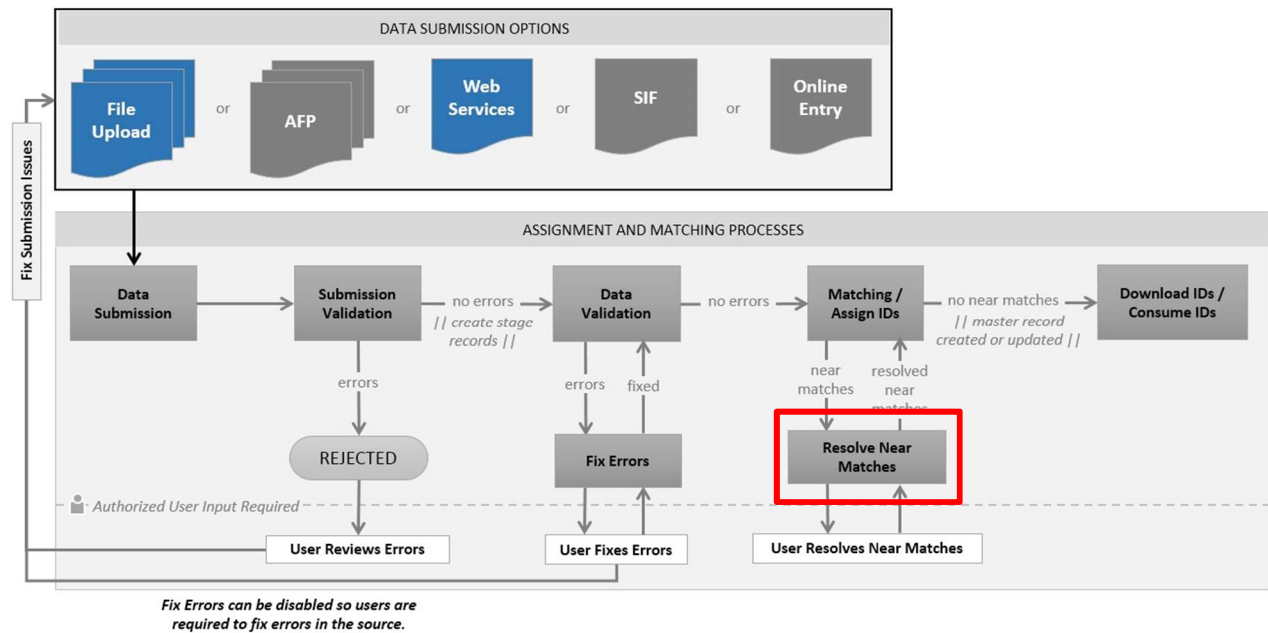


NOTE: If the application is interrupted (e.g., connectivity to the database is lost) while it is performing ID assignment, the batch will be returned with a message stating the same. The process can be restarted by clicking **CONTINUE ASSIGNMENT** in the **Next Action** column. This may be the case even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

Batch Information

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

STEP 3: RESOLVING NEAR MATCHES



About Resolving Near Matches

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

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

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

Cancel All Checked Records: On the initial near match page for the batch, the near match records include a check box. When the Cancel All Check Records button is clicked, all near match records that have a checked check box will be canceled. Any unselected near matches will remain in the pending near match queue.

Cancel All Near Match Records For This Batch: On the initial near match page for the batch, all of

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

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

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

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

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

Additional details on these buttons is provided below.



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

Special Note about Near Matches:

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

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

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

Steps

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

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

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

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

STAFF ID Jig. Arlington, Department of Education

Near Match - Batch 119 ?

FILTER

LAST NAME

FILTER RESULTS

Select All On Page

LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	LEA	SCHOOL/SITE CODE	SIS DISTRICT	LOCAL ID	NEXT ACTION
Valentin	Brad		Gallagher		09/07/1999	MALE	009	LEA	009	8	REVIEW AND SELECT

Displaying 1 - 1 of 1

<< FIRST < PREV PAGE 1 OF 1 NEXT > LAST >>

CANCEL ALL NEAR MATCH RECORDS FOR THIS BATCH
CANCEL ALL CHECKED RECORDS

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



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

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

PERSON RECORD TO REVIEW AND SELECT									
LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	LEA	SCHOOL/SITE CODE	LOCAL ID
Valentin	Brad		Gallagher		09/07/1999	MALE	009	LEA	8

NEAR MATCHES / DUPLICATES FOUND										
LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	LEA	SCHOOL/SITE CODE	LOCAL ID	MATCH PROBABILITY
Valentin	Brad		Gallagher		09/08/1999	FEMALE	009	LEA	184124937131	91 [NEAR MATCH]

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

CANCEL RECORD SELECT ANOTHER RECORD CREATE NEW ID ASSIGN SELECTED

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

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

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

Near Match: Compare - Batch 119 ?

91

Brad Valentin (SUBMISSION)

GENDER: MALE | DATE OF BIRTH: 09/07/1999 | LOCAL ID: 0 | SSN: Not Present

vs.

Brad Valentin (M1152474588)

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

COMPARE RECORDS

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

FIELDS	SUBMISSION RECORD	MASTER RECORD (STATE ID: 1152474588)	ADD NOTE
FIRST NAME	Brad	Brad	
LAST NAME	Valentin	Valentin	
MIDDLE NAME			
SUFFIX			
ALT LAST NAME	Gallagher	Gallagher	
DATE OF BIRTH	09/07/1999	09/08/1999	
GENDER	MALE	FEMALE	
SSN	Not Present	Not Present	
LEA	009 - Allentown School District	009 - Allentown School District	
SCHOL SITE CODE	LEA - Allentown School District	LEA - Allentown School District	
RES DISTRICT	009	009	
Classification Level	01	01	
ENROLL SCHOOL SESSION LEA	2015	2015	
SOURCE SYSTEM	PEP	PEP	
LOCAL ID	0	184124937131	
STATE ID		1152474588	
ALTERNATE ID			
ALTERNATE SOURCE			
STREET ADDRESS PHYSICAL	20 Columbus Ave	20 Columbus Ave	
CITY PHYSICAL	Stamford	Stamford	
STATE	VA	VA	
ZIP CODE PHYSICAL	06905	06905	
PARENTAL CONSENT FLAG	No	No	
SERIAL #	51206	51187	
CREATED	04/30/2015	04/30/2015	
LAST UPDATED	04/30/2015	04/30/2015	
COMMENTS	1152474588		
MATCH NOTES			

RETURN TO LIST
CANCEL SUBMISSION
CREATE NEW!
ASSIGN SELECTED

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

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



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







NOTE: Users can add staff Notes from the page above. For more information on staff Notes, please refer to the [Person Note](#) section.

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

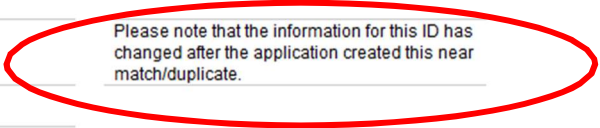
COMMENTS	8816079282;
MATCH NOTES	
UPDATE MASTER	<input checked="" type="radio"/> Yes <input type="radio"/> No


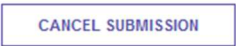


7. Decide how the near match should be resolved. To resolve a near match a user can assign an ID, create a new ID or cancel the record. A near match is only resolved once, so once you click a decision button the near match is resolved. Once a decision is submitted, it cannot be reverted.
 - a. If the staff under review is the same as master record, the user should click the **ASSIGN SELECTED** button. When the **ASSIGN SELECTED** button is clicked the user is indicating that the submitted staff is the same as the master record and the unique identifier will be retrieved and linked to the submission record.

- b. If the staff under review is different from the master record, the user should click  button. When the  button is clicked, the user is indicating that the submitted staff is different than the master record and a new ID will be created for the submission record.
- c. If the user wishes to cancel the record under review, the user should click the  button. When the Cancel Submission button is clicked, the pending near match will be canceled. If a pending near match is canceled, no ID is assigned or created and the record must be resubmitted to the application.
- d. Users can also navigate back to the list of Near Matches by clicking .

Not all  *h some implementations, the **Assign Selected/Match, Create New ID/No Match** or **Record** buttons could be disabled.*

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





COMMENTS	8816079282;	
MATCH NOTES		
UPDATE MASTER	<input checked="" type="radio"/> Yes <input type="radio"/> No	

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

Field Descriptions:

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

8. Click the appropriate decision button ( ,  or ) or click the  button to return to the Resolve Near Matches / Duplicates details page.
9. From the near match summary page, users can view additional details if necessary. On the Resolve Near Matches/Duplicates page, users can view information about the staff's school by clicking the link in the School Code column:

STAFF ID Jg. Allentown, Department of Education

Resolve Near Matches / Duplicates - **Batch 119** ?

PERSON RECORD TO REVIEW AND SELECT

LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	LEA	SCHOOL/SITE CODE	LOCAL ID
Valentin	Brad		Gallagher		09/07/1999	MALE	009	LEA	8

NEAR MATCHES / DUPLICATES FOUND

LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	LEA	SCHOOL/SITE CODE	LOCAL ID	MATCH PROBABILITY
<input type="radio"/>	Valentin	Brad	Gallagher		09/08/1999	FEMALE	009	LEA	184124937131	91 [NEAR MATCH]

CANCEL RECORD
SELECT ANOTHER RECORD
CREATE NEW ID
ASSIGN SELECTED

SCHOOL INFORMATION: Allentown School District

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

CLOSE WINDOW

RETURN TO LIST

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

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

PERSON RECORD TO REVIEW AND SELECT										
LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	LEA	SCHOOL/SITE CODE	LOCAL ID	
Valentin	Brad		Gallagher		09/07/1999	MALE	009	LEA	8	

NEAR MATCHES / DUPLICATES FOUND										
LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	LEA	SCHOOL/SITE CODE	LOCAL ID	MATCH PROBABILITY
<input checked="" type="radio"/>	Valentin	Brad	Gallagher		09/08/1999	FEMALE	009	LEA	184124937131	91 [NEAR MATCH]

CANCEL RECORD **SELECT ANOTHER RECORD** **CREATE NEW ID** **ASSIGN SELECTED**

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

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

PERSON RECORD TO REVIEW AND SELECT										
LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	LEA	SCHOOL/SITE CODE	LOCAL ID	
Valentin	Brad		Gallagher		09/07/1999	MALE	009	LEA	8	

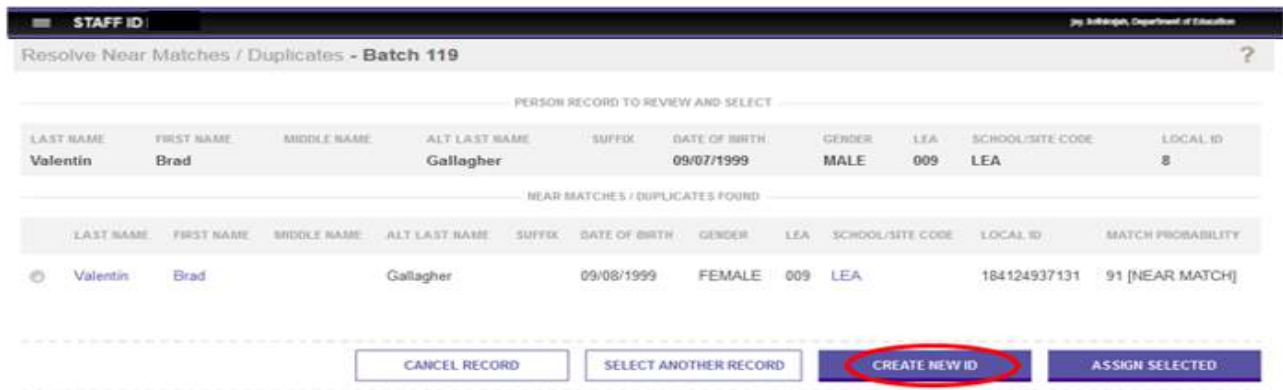
NEAR MATCHES / DUPLICATES FOUND										
LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	LEA	SCHOOL/SITE CODE	LOCAL ID	MATCH PROBABILITY
<input checked="" type="radio"/>	Valentin	Brad	Gallagher		09/08/1999	FEMALE	009	LEA	184124937131	91 [NEAR MATCH]

CANCEL RECORD **SELECT ANOTHER RECORD** **CREATE NEW ID** **ASSIGN SELECTED**

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



13. If the staff under review is different from the matching staff records, the user should click



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



14. If the user wishes to cancel the record under review, the user should click the



button.

15. Users can also navigate back to the list of Near Matches by clicking

SELECT ANOTHER RECORD



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

Canceling Near Matches

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

To cancel records, users should check the box(es) to the left of the record(s) and then click the

CANCEL ALL CHECKED RECORDS

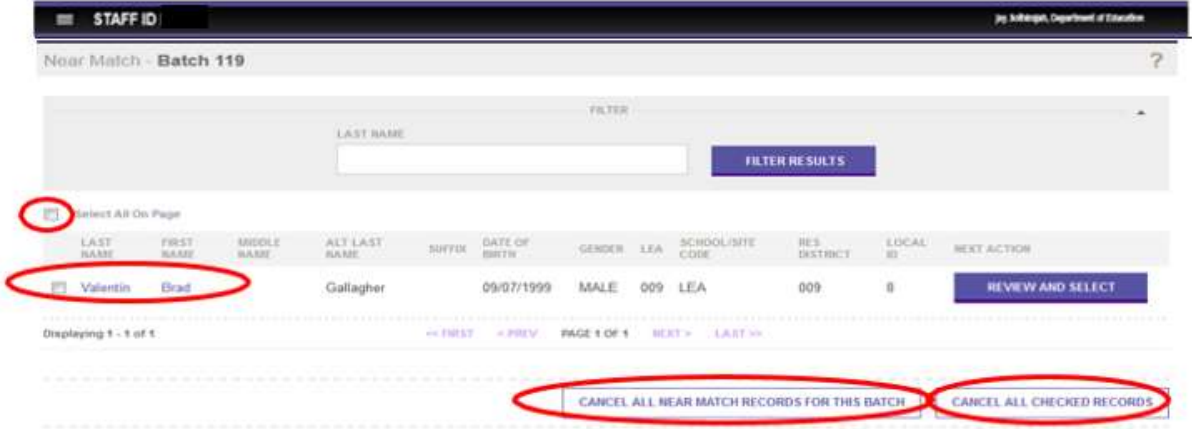
button. Users can select all records on the page by selecting the

SELECT ALL IN PAGE checkbox before clicking

CANCEL ALL CHECKED RECORDS

To cancel all records in the batch, users should click the

CANCEL ALL NEAR MATCH RECORDS FOR THIS BATCH



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

Once all records are resolved, the next step in the process is to [Download the ID](#).

Filtering Near Matches

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

STAFF ID Jay Sullivan, Department of Education

Near Match - Batch 122 ?

FILTER

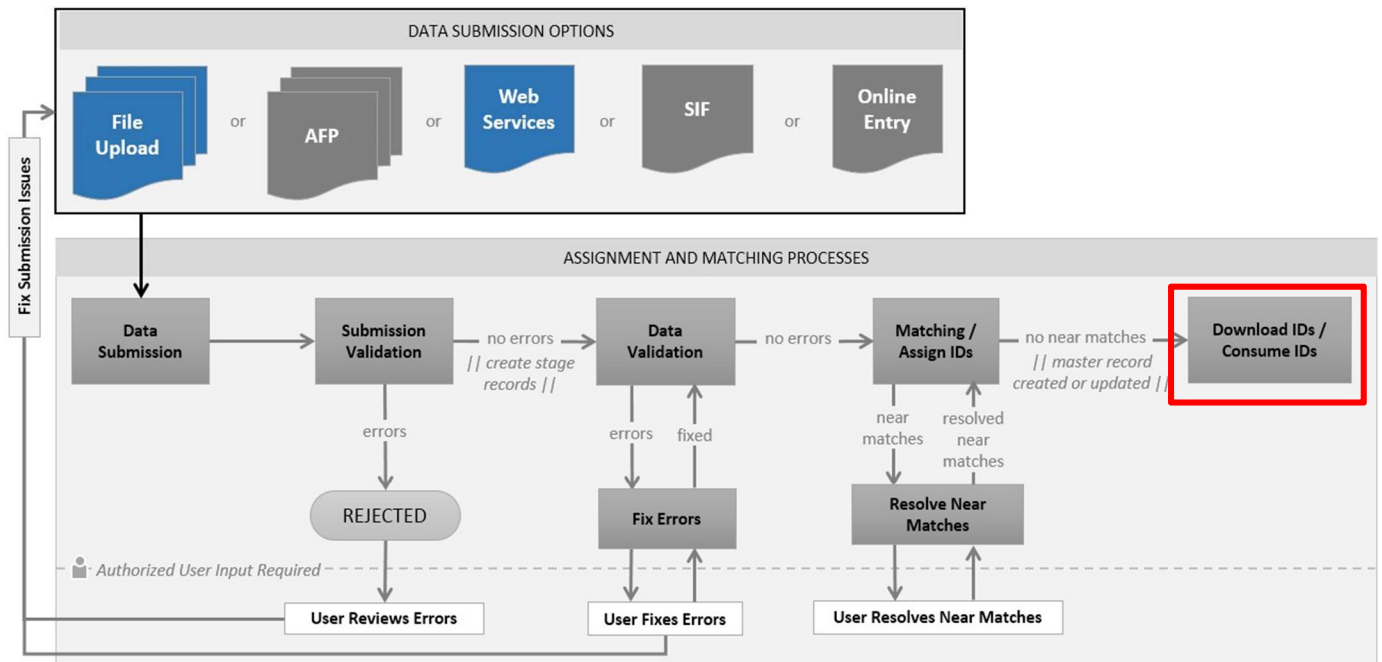
LAST NAME **FILTER RESULTS**

Select All On Page

LAST NAME	FIRST NAME	MIDDLE NAME	ALT LAST NAME	SUFFIX	DATE OF BIRTH	GENDER	LEA	SCHOOL/SITE CODE	RES DISTRICT	LOCAL ID	NEXT ACTION
<input type="checkbox"/> Dye	Doug		Dye		07/01/2002	FEMALE	009	LEA	009	489649553756	REVIEW AND SELECT
<input type="checkbox"/> Valentin	Brad		Gallagher		09/05/1999	MALE	009	LEA	009	8	REVIEW AND SELECT

Displaying 1 - 2 of 2 << FIRST < PREV PAGE 1 OF 1 NEXT > LAST >>

STEP 4: DOWNLOADING IDs



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

About Downloading IDs

Upon completion of the steps described above, the application home page will display the status of the batch as “ID Assigned” and a [DOWNLOAD STAFF ID](#) button in the Next Action column.

STAFF ID HOME by Ashleigh, Department of Education

Home ?

FILTER

DISTRICT: Alertown School District [900]

SCHOOL: []

BATCH NUMBER: []

SUBMISSION TYPE: All

PROCESSING STAGE: All

FROM: 02/16/2015

TO: 03/19/2015



Sort: Upload Date Desc

FILTER RESULTS

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
03/19/2015 12:55	File	143	900	LEA	SIS	Near Matches / Duplicates Found	17 of 22	RESOLVE NEAR MATCHES
03/19/2015 12:25	File	135	900	LEA	SIS	ID(s) Assigned	1 of 1	DOWNLOAD STATE ID

Steps

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

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



UPLOAD DATE	BATCH INFO	STATUS	RECORD COUNT	NEXT ACTION
03/19/2015 12:25	135	File Extract Complete	1	DOWNLOAD

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



NOTE: The downloaded file can be used to update a user's local Staff data system.

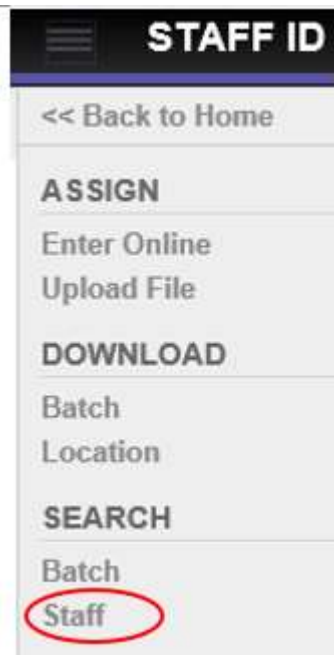
Batch Information

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

SEARCH > BY STAFF

About Search By Staff

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



This feature allows users to:

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

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

Depending upon system configuration, the staff 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 staff records using this feature, users should perform the following:

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

STAFF ID HOME jay. Sothirajah, Department of Education

Staff Search - Individual Staff ?

BASIC SEARCH ADVANCED SEARCH ID SEARCH

First Name*

Middle Name

Last Name*

Suffix

Date Of Birth

(*) Required CLEAR SEARCH



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

Basic Search

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

STAFF ID HOME jay.Sothirajah, Department of Education

Staff Search - Individual Staff ?

BASIC SEARCH | ADVANCED SEARCH | ID SEARCH

First Name:*

Middle Name:

Last Name:*

Suffix:

Date Of Birth: / /

(*) Required



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:

STAFF ID HOME jay. Sathirajah, Department of Education

Staff Search - Individual Staff ?

BASIC SEARCH | ADVANCED SEARCH | ID SEARCH

First Name:*

Middle Name:

Last Name:*

Suffix:

Date Of Birth: mm / dd / yyyy

(*) Required CLEAR SEARCH

Staff ID	LAST NAME	FIRST NAME	MIDDLE NAME	SUFFIX	DATE OF BIRTH	GENDER	LEA	SCHOOL/SITE CODE	SSN	MATCH PROBABILITY
9515127955	Valentin	Brad			09/06/1999	MALE	009	LEA	Not Present	80
1152474588	Valentin	Brad			09/07/1999	MALE	009	LEA	Not Present	80

Search with date of birth:

STAFF ID HOME Joy, Sothirajah, Department of Education

Staff Search - Individual Staff ?

BASIC SEARCH ADVANCED SEARCH ID SEARCH

First Name*

Middle Name

Last Name*

Suffix

Date Of Birth / /

(*) Required

SEARCH RESULTS

Staff ID	LAST NAME	FIRST NAME	MIDDLE NAME	SUFFIX	DATE OF BIRTH	GENDER	LEA	SCHOOL/SITE CODE	SSN	MATCH PROBABILITY
9515127955	Valentin	Brad			09/06/1999	MALE	009	LEA	Not Present	98 [MATCH]
1152474588	Valentin	Brad			09/07/1999	MALE	009	LEA	Not Present	92 [NEAR MATCH]



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 staff Search component could differ from that in the ID Assignment process based on System Configurations and matching fields provided by the user.

Advanced Search

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

Staff ID

Person Search - Individual Person

BASIC SEARCH **ADVANCED SEARCH** ID SEARCH

GENERAL INFORMATION

ADDRESS INFORMATION

CUSTOMER DEFINED FIELDS

LOCATION/ENROLLMENT INFORMATION

Customer Defined Fields are also displayed if enabled.

CLEAR SEARCH



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 staff records using various IDs. Users will be able to search using Staff State ID, SSN, Alias ID, all from the same page.

STAFF ID HOME Jay Sothirajah, Department of Education

Staff Search - Individual Staff ?

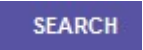
BASIC SEARCH ADVANCED SEARCH ID SEARCH

ID:*

ID Type:* Staff ID SSN Alias ID

Source:

(*) Required CLEAR SEARCH

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

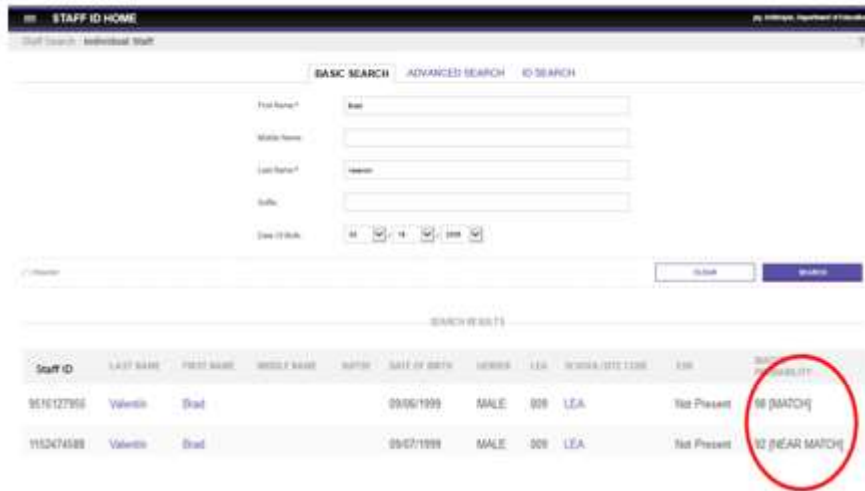


NOTE: In this module, the application will search against the current information for staff records who have been assigned an ID. Searching for a staff's history information (e.g., previous school code) may not return desired results.

Viewing the Search Results


Records Found

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



The screenshot shows the 'STAFF ID HOME' search interface. It includes search tabs for 'BASIC SEARCH', 'ADVANCED SEARCH', and 'ID SEARCH'. The search criteria are: First Name: 'Smith', Middle Name: (empty), Last Name: 'Smith', and Suffix: (empty). The search results table is as follows:

Staff ID	LAST NAME	FIRST NAME	MIDDLE NAME	NOTES	DATE OF BIRTH	SEX	LEA	STATUS/DATE LEAVE	DOB	MATCH PROBABILITY
951612795	Valentin	Brad			09/05/1999	MALE	909	LEA	Not Present	98 (MATCH)
115247438	Valentin	Brad			09/07/1999	MALE	909	LEA	Not Present	92 (NEAR MATCH)

 **NOTE:** There is an application-level setting that allows clients to change the type of search users can perform. One type is a Matching Engine Search that uses the StaffID application matching engine to find staff records. The other type is a SQL Engine Search that uses basic database queries to find staff records. With the latter, this module will perform right truncation searches. For example, searching for the staff "Smith" will also return the staff "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.

The screenshot displays the 'Staff Search - Individual Staff' interface. At the top, there is a navigation bar with 'STAFF ID HOME' on the left and 'Jy. Solingoh, Department of Education' on the right. Below the navigation bar, the page title 'Staff Search - Individual Staff' is visible on the left and a question mark icon on the right. The main content area features three search tabs: 'BASIC SEARCH' (selected), 'ADVANCED SEARCH', and 'ID SEARCH'. The search form includes the following fields: 'First Name*' with the value 'Joe', 'Middle Name' (empty), 'Last Name*' with the value 'XXXX', 'Suffix' (empty), and 'Date Of Birth' with dropdown menus for month, day, and year. Below the search form, there are three buttons: 'CLEAR', 'SEARCH', and 'ENTER NEW STAFF'. A dashed line separates the search form from the search results section. The search results section is titled 'SEARCH RESULTS' and displays the message 'No records found', which is circled in red. At the bottom of the page, the copyright notice 'Copyright © 2019, eScholar LLC.' is visible.

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 staff.

STAFF ID HOME Jy. Schiraga, Department of Education

Staff Search - Individual Staff ?

BASIC SEARCH | ADVANCED SEARCH | ID SEARCH

First Name*

Middle Name

Last Name*

Suffix

Date Of Birth:

Search History

(*) Required

SEARCH RESULTS

Staff ID	LAST NAME	FIRST NAME	MIDDLE NAME	SUFFIX	DATE OF BIRTH	GENDS	LEA	SCHOOL/SITE CODE	SSN	MATCH PROBABILITY
5816319752	Dye	Doug			07/03/2002	FEMALE	009	LEA		Not Present

Retired IDs

User can also search for Retired IDs using the ID Search page and entering the StaffID. After entering the StaffID, the results will be displayed in the Search Results List highlighted in Red. Searching by SSN or Alias ID will not return retired records.

The screenshot shows the 'STAFF ID HOME' interface for the 'Jy. Sotirajah, Department of Education'. The page title is 'Staff Search - Individual Staff'. There are three search tabs: 'BASIC SEARCH', 'ADVANCED SEARCH', and 'ID SEARCH'. The 'ID SEARCH' tab is active. The search form includes an 'ID*' field with the value '5200243998', an 'ID Type*' field with radio buttons for 'State ID' (selected), 'SSN', and 'Alias ID', and a 'Source:' dropdown menu. Below the form are 'CLEAR' and 'SEARCH' buttons. The search results are displayed in a table with the following columns: LAST NAME, FIRST NAME, MIDDLE NAME, SUFFIX, DATE OF BIRTH, GENDER, DISTRICT, SCHOOL, ETHNICITY INDICATOR, RACE(ET), SSN, and MATCH PROBABILITY. The first result is highlighted in red and circled, showing the ID '5200243998 (Retired ID)' and the name 'Sm, John'.

LAST NAME	FIRST NAME	MIDDLE NAME	SUFFIX	DATE OF BIRTH	GENDER	DISTRICT	SCHOOL	ETHNICITY INDICATOR	RACE(ET)	SSN	MATCH PROBABILITY
5200243998 (Retired ID)	Sm,	John		05/23/1991	FEMALE	0009	0101	Non-Hispanic	Multiple Races	Not Present	

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

Student Search - Individual Student Information



John Smith (Retired ID)

5200243998

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

RETIRED MASTER RECORD RETIRED HISTORY ASSOCIATED IDs

REASON FOR RETIREMENT: Duplicate created by user

GENERAL INFORMATION

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

CUSTOMER DEFINED FIELDS

EMAIL	90 Morgan St
CELL PHONE	Norwalk
PARENTAL CONSENT FLAG	LA

BATCH INFORMATION

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

LOCATION / ENROLLMENT INFORMATION

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

BACK TO SEARCH RESULTS

Enter New Staff

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

The screenshot shows the 'STAFF ID HOME' interface for 'Staff Search - Individual Staff'. It features three search tabs: 'BASIC SEARCH', 'ADVANCED SEARCH', and 'ID SEARCH'. The 'BASIC SEARCH' tab is active, displaying input fields for 'First Name*' (containing 'Doug'), 'Middle Name', 'Last Name*' (containing 'XXXX'), 'Suffix', and 'Date Of Birth' (with dropdown menus for month, day, and year). Below the search fields, there are three buttons: 'CLEAN', 'SEARCH', and 'ENTER NEW STAFF'. The 'ENTER NEW STAFF' button is circled in red. A dashed line separates the search area from the 'SEARCH RESULTS' section below.

Viewing Individual Staff Information

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

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

The screenshot shows the 'Staff Search - Individual Staff' interface. At the top, there is a navigation bar with 'STAFF ID HOME' and 'Jay Sobrinjan, Department of Education'. Below the navigation bar, the page title 'Staff Search - Individual Staff' is displayed. The search interface includes three tabs: 'BASIC SEARCH', 'ADVANCED SEARCH', and 'ID SEARCH'. The 'BASIC SEARCH' tab is active. The search criteria are as follows:

- First Name*: Brad
- Middle Name: (empty)
- Last Name*: Valentin
- Suffix: (empty dropdown)
- Date Of Birth: mm: / dd: / yyyy: (empty dropdowns)

Below the search criteria, there is a 'CLEAR' button and a 'SEARCH' button. A note indicates that fields with an asterisk (*) are required. The search results are displayed in a table with the following columns: STATE ID, LAST NAME, FIRST NAME, MIDDLE NAME, SUFFIX, DATE OF BIRTH, GENDER, LEA, SCHOOL/SITE CODE, SSN, and MATCH PROBABILITY. Two results are shown, with the first result highlighted by a red circle around the 'LAST NAME' and 'FIRST NAME' columns.

STATE ID	LAST NAME	FIRST NAME	MIDDLE NAME	SUFFIX	DATE OF BIRTH	GENDER	LEA	SCHOOL/SITE CODE	SSN	MATCH PROBABILITY
1562846375	Valentin	Brad			09/05/1999	MALE	009	LEA	Not Present	80
1152474588	Valentin	Brad			09/07/1999	MALE	009	LEA	Not Present	80

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

Staff Search - Individual Staff Information



BRAD VALENTIN

77-3661-2757

GENDER: MALE DATE OF BIRTH: 01/01/2020 LOCAL ID: 000000000 SSN: ###-##-9999 PERSON TYPE: Staff

LAST UPDATED: 01/24/2020 15:41 ID CREATED: 01/24/2020 15:41

[MASTER RECORD](#) [HISTORY](#) [ASSOCIATED RETIRED IDS](#) [ENROLLMENT](#) [DIRECTMATCH](#)

[ADD NOTE](#)

GENERAL INFORMATION

ADDRESS INFORMATION

FIRST NAME	Brad
MIDDLE NAME	
LAST NAME	Valentin
ALT LAST NAME	
SUFFIX	
GENDER	MALE
DATE OF BIRTH	01/01/2020
RACE/ETHNICITY	Non-Hispanic, White
RACE 2 CODE	
RACE 3 CODE	
RACE 4 CODE	
RACE 5 CODE	
SSN	###-##-9999
STAFF ID	77-3661-2757

ADDRESS 1	
ADDRESS 2	
CITY	
STATE	
ZIP	

BATCH INFORMATION

LAST BATCH #	1
LAST UPDATED	01/24/2020 15:41
UPDATE REFERENCE #	5507
INPUT TYPE	Batch
CREATED BY	Anantha Lakkakula
EMAIL ADDRESS - CREATED BY	Anantha.Lakkakula@LA.GOV
CREATED	01/24/2020 15:39
STATUS	New ID Assigned - No Matching Record Found
CCRAA/HHS	

In StaffID, the staff Information page features a staff Panel which includes basic staff demographics as well as three tabs:

Master Record

- This section allows users to view additional information from the Master record, edit the staff, 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 staff information that has been retired and associated to the ID under review.

Brad Valentin				7736612757		
GENDER: MALE	DATE OF BIRTH: 09/05/1999	LOCAL ID: 654654	SSN: Not Present	PERSON TYPES: Staff	LAST UPDATED: 08/12/2016 10:56	CREATED: 08/12/2016 10:56
<u>MASTER RECORD</u>	HISTORY	ASSOCIATED RETIRED IDs				ADD NOTE

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



Screenshot from History Tab:

STAFF ID HOME Jay Schirajal, Department of Education

Staff Search - Individual Staff ?

Bradley A Valentin 7736612757

GENDER: MALE DATE OF BIRTH: 05/09/1999 LOCAL ID: 654854 SSN: Not Present PERSON TYPE: Student LAST UPDATED: 08/15/2016 08:15 CREATED: 08/12/2016 10:54

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

LAST UPDATED	LAST NAME	FIRST NAME	MIDDLE NAME	SUFFIX	DATE OF BIRTH	GENDER	LOCATION	BUILDING	ETHNICITY INDICATOR	RACE(S)	SSN
08/15/2016 08:18	Valentin	Brad	A		09/05/1999	MALE	0009	0101		White (Non-Hispanic)	Not Present
08/12/2016 10:56	Valentin	Brad			09/05/1999	MALE	0009	0101		White (Non-Hispanic)	Not Present

[BACK TO SEARCH RESULTS](#)



TIP: In StaffID, History is displayed as its own tab. Click on the arrow to expand the History record.

Screenshot from Associated Retired IDs tab:

STAFF ID HOME Jay Schirajal, Department of Education

Staff Search - Individual Staff ?

Bradley A Valentin 7736612757

GENDER: MALE DATE OF BIRTH: 05/09/1999 LOCAL ID: 654854654 SSN: Not Present PERSON TYPE: Student LAST UPDATED: 08/15/2016 10:16 CREATED: 08/15/2016 10:16

MASTER RECORD HISTORY **ASSOCIATED RETIRED IDs** ENROLLMENT ADD NOTE VIEW NOTE

RETIRED ID	LAST NAME	FIRST NAME	MIDDLE NAME	SUFFIX	DATE OF BIRTH	GENDER	DISTRICT	SCHOOL	ETHNICITY INDICATOR	RACE (S)	SSN	REASON FOR RETIREMENT
8276199518	Valentin Smith	Brad	Sam		05/09/1999	MALE	0009	0101			Not Present	Duplicated created by user

[BACK TO SEARCH RESULTS](#)

EDITING STAFF

About Editing Staff

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


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

AND

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

Steps

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

1. Perform a search as described above.
2. Click the  button on the Individual staff Information page.

Staff Search - Individual Staff Information ?

BRAD VALENTIN **77-3661-2757**
 GENDER: MALE | DATE OF BIRTH: 01/01/2020 | LOCAL ID: 999999999 | SSN: ###-##-9999 | PERSON TYPE: Staff
 LAST UPDATED: 01/24/2020 15:41 | ID CREATED: 01/24/2020 15:41

[MASTER RECORD](#) | [HISTORY](#) | [ASSOCIATED RETIRED IDS](#) | [ENROLLMENT](#) | [DIRECTMATCH](#) [ADD NOTE](#)

GENERAL INFORMATION

FIRST NAME	Brad
MIDDLE NAME	
LAST NAME	Valentin
ALT LAST NAME	
SUFFIX	
GENDER	MALE
DATE OF BIRTH	01/01/2020
RACE/ETHNICITY	Non-Hispanic, White
RACE 2 CODE	
RACE 3 CODE	
RACE 4 CODE	
RACE 5 CODE	
SSN	###-##-9999
STAFF ID	77-3661-2757

ADDRESS INFORMATION

ADDRESS 1	
ADDRESS 2	
CITY	
STATE	
ZIP	

BATCH INFORMATION

LAST BATCH #	1
LAST UPDATED	01/24/2020 15:41
UPDATE REFERENCE #	5507
INPUT TYPE	Batch
CREATED BY	Anantha Lakkakula
EMAIL ADDRESS - CREATED BY	Anantha.Lakkakula@LA.GOV
CREATED	01/24/2020 15:39
STATUS	New ID Assigned - No Matching Record Found
EXAMINES	

LOCATION / ENROLLMENT INFORMATION

PERSON TYPE	Staff
CLASSIFICATION	SCHOOL BOARD EMPLOYEE
SCHOOL/SITE CODE	LEA Department of Education
LEA CODE	SEA Department of Education
ENDING SCHOOL SESSION YEAR	2020
LOCAL ID	999999999
SOURCE SYSTEM	PEP
ALTERNATE ID	247416
ALTERNATE SOURCE	TCMS
LAST UPDATED	01/24/2020 15:41
CREATED	01/24/2020 15:41

[BACK TO SEARCH RESULTS](#)
EDIT STUDENT

EDIT PERSON

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

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

Edit Staff Record - Any corrections to data should also be made in your local staff information system.

GENERAL INFORMATION		ADDRESS INFORMATION	
FIRST NAME *	C [REDACTED]	ADDRESS 1	
MIDDLE NAME		ADDRESS 2	
LAST NAME *	STA [REDACTED]	CITY	
ALT LAST NAME		STATE	▼
SUFFIX		ZIP	
GENDER *	MALE ▼	CUSTOMER DEFINED FIELDS	
DATE OF BIRTH *	[REDACTED] / [REDACTED] / [REDACTED] ▼	STATE USERID	
RACE/ETHNICITY *	Non-Hispanic, White ▼	LOCATION / ENROLLMENT INFORMATION	
RACE 2 CODE	▼	PERSON TYPE	Staff ▼
RACE 3 CODE	▼	GRADE PLACEMENT *	SCHOOL BOARD EMPLOYEE ▼
RACE 4 CODE	▼	SCHOOL/SITE CODE *	LEA
RACE 5 CODE	▼	LEA CODE *	SEA Department of Education
SSN	[REDACTED]	RESIDING PARISH CODE *	SEA
STAFF ID	[REDACTED]	ENDING SCHOOL SESSION YEAR *	2020
		LOCAL ID *	99999999
		SOURCE SYSTEM *	PEP ▼
		ALTERNATE ID	[REDACTED]
		ALTERNATE SOURCE	TCMS ▼

(*) Required

[BACK TO STAFF INFORMATION](#)
[UPDATE STAFF RECORD](#)

4. Update information as necessary. School Code and District Code are not editable, but all other fields can be updated.

5. To save the changes, click the **UPDATE PERSON RECORD** button.

● To cancel the changes, click the **BACK TO SEARCH RESULTS** button.



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

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

The screenshot shows the 'Edit Student Information' page for a student named Bradley A. Valentin. A red oval highlights a yellow error message at the top: 'The student information has not been updated. Validation errors.' Below this, another red oval highlights a specific error: 'Validation Errors : GENDER required'. The GENDER field in the 'GENERAL INFORMATION' section is also highlighted with a red oval and is currently blank. The page includes sections for 'GENERAL INFORMATION', 'CUSTOMER DEFINED FIELDS', and 'LOCATION / ENROLLMENT INFORMATION'. At the bottom, there are buttons for 'BACK TO STUDENT INFORMATION' and 'UPDATE STUDENT RECORD', along with a note '(*) Required'.

GENERAL INFORMATION		CUSTOMER DEFINED FIELDS	
FIRST NAME *	Bradley	EMAIL	fakeemail@abcdef.com
MIDDLE NAME	A	CELL PHONE	
LAST NAME *	Valentin	PARENTAL CONSENT FLAG	Y
ALT LAST NAME			
SUFFIX			
GENDER *			
DATE OF BIRTH*	05 / 09 / 1999		
ETHNICITY INDICATOR			
ETHNICITYRACE *	White (Non-Hispanic)		
SSN	- -		
STATE ID	7736612757		

LOCATION / ENROLLMENT INFORMATION	
GRADE: *	Grade 10
BUILDING: *	0101
LOCATION *	0009
RES LOCATION	0009
ENROLLMENT YEAR *	2016
LOCAL ID	654654
SOURCE SYSTEM *	SIS
ALTERNATE ID	
ALTERNATE SOURCE	

(*) Required

[BACK TO STUDENT INFORMATION](#) [UPDATE STUDENT RECORD](#)

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

STATE ID 0000supr, Allentown School District

Edit Student Information ?

The student record has been updated. Batch: 3060. You can download this information using Extract & Download.

Edit Student Record - Any corrections to data should also be made in your local student information system.

GENERAL INFORMATION

FIRST NAME *	Bradley
MIDDLE NAME	A
LAST NAME *	Valentin
ALT LAST NAME	
SUFFIX	
GENDER *	MALE
DATE OF BIRTH*	05 / 09 / 1999
ETHNICITY INDICATOR	
ETHNICITYRACE *	White (Non-Hispanic)
SSN	- -
STATE ID	7736612757

CUSTOMER DEFINED FIELDS

EMAIL	fakeemail@abcdef.com
CELL PHONE	555-555-5555
PARENTAL CONSENT FLAG	Y

LOCATION / ENROLLMENT INFORMATION

GRADE: *	Grade 10
BUILDING: *	0101 James Madison High School
LOCATION *	0009 Allentown School District
RES LOCATION	0009
ENROLLMENT YEAR *	2016
LOCAL ID	654654
SOURCE SYSTEM *	SIS
ALTERNATE ID	
ALTERNATE SOURCE	

(*) Required

[BACK TO STUDENT INFORMATION](#) [UPDATE STUDENT RECORD](#)

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

PERSON NOTES

Adding Staff Notes

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

- Search Individual Staff Detail Results
- Near Match Review



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

Steps

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

1. Click the staff **Search** link on the *Menu*.
2. Search for a staff as described above.
3. Click the hyperlinked **Last Name** or **First Name** to view the search details. Upon clicking the hyperlinks, the staff **Search** information page will be displayed.

The screenshot shows the 'Staff Search - Individual Staff' page for Brad Valentin. The page is divided into two main sections: 'GENERAL INFORMATION' and 'ADDRESS INFORMATION'. The 'GENERAL INFORMATION' section includes fields for First Name (Brad), Middle Name, and Last Name (Valentin). The 'ADDRESS INFORMATION' section includes fields for Address 1 (20 Columbus Ave), Address 2, and City (Stamford). The 'ADD NOTE' link is circled in red.

GENERAL INFORMATION		ADDRESS INFORMATION	
FIRST NAME	Brad	ADDRESS 1	20 Columbus Ave
MIDDLE NAME		ADDRESS 2	
LAST NAME	Valentin	CITY	Stamford

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

STAFF ID HOME Jag. Johnson, Department of Education

Add Person Note

GENERAL NOTE (STATE ID: 362-244-8946)

NOTE TEXT* (maximum length: 255 characters)

(*) Required

BACK SAVE

6. Enter Note Text.
7. Click the **SAVE** button.
8. A confirmation page will be displayed allowing the user to view the note that was added.
9. Click the **BACK** button to return to the staff Information page. Staff notes can be added throughout the application where the “Add Note” link exists.

Viewing Staff Notes

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

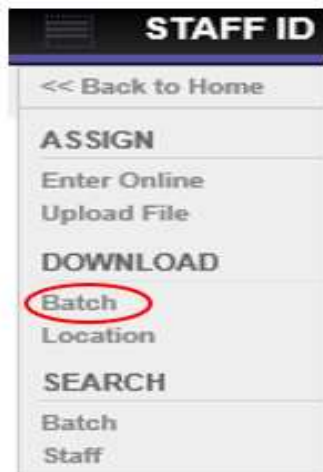
Steps

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

SEARCH > BY BATCH

About Batch Search

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



This feature allows users to:

- Search for staff records with a batch file and download results of the search.

- View previous batch search results.

- Extract & Download a batch.

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



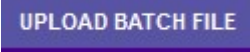
NOTE: In this module, the application will search against the current information for staff records that have been assigned an ID. Although a Batch Search performs a similar search to the ID Assignment search, it is not exactly the same and may produce different results.

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

Steps

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

1. Click the **Batch Search** link on the *Menu*.

2. Click the  button.

STAFF ID HOME Jy. Robinson, Department of Education

Batch Search ?

UPLOAD BATCH FILE
EXTRACT & DOWNLOAD BATCH

FILTER

PROCESSING STAGE: All
 FROM: 02/16/2015
 TO: 03/19/2015
 BATCH NUMBER:
FILTER RESULTS

DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
03/18/2015 16:22	Search	104	900	LEA	ACT	Download Search results	1 of 1	DOWNLOAD

Displaying 1 - 1 of 1

<< FIRST
< PREV
PAGE 1 OF 1
NEXT >
LAST >>

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

Basic Batch Search

STAFF ID HOME Jy. Robinson, Department of Education

Upload Search File ?

BASIC
ADVANCED

File to Upload: BROWSE

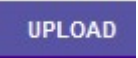

(*) Required UPLOAD

Advanced Batch Search

The screenshot shows the 'Advanced Batch Search' form in the 'STAFF ID HOME' application. The form is titled 'Upload Search File' and has a 'BASIC' tab selected. The form fields are as follows:

- Template: eScholar Uniq-ID® v3.0
- File to Upload: Choose File (with a BROWSE button)
- Delimiter: TAB
- Qualifier: (empty dropdown)
- Source System: (empty dropdown)
- Ignore First Row: Yes No
- Filters: LEA CODE SCHOOL/SITE CODE GRADE PLACEMENT DATE OF BIRTH ENDING SCHOOL SESSION YEAR

At the bottom right of the form is an 'UPLOAD' button. A note at the bottom left states '(*) Required'.

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



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



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

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



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

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

The screenshot shows the 'Batch Search' page with a header 'STAFF ID' and 'My Michigan, Department of Education'. Below the header are buttons for 'UPLOAD BATCH FILE' and 'EXTRACT & DOWNLOAD BATCH'. A filter section includes 'PROCESSING STAGE' (All), 'FROM' (02/18/2015), 'TO' (03/19/2015), and 'BATCH NUMBER'. A table lists search batches with columns: DATE, SUBMISSION TYPE, BATCH INFO, DISTRICT, SCHOOL, SOURCE SYSTEM, STATUS, RECORD COUNT, and NEXT ACTION. The 'VALIDATE' button in the 'NEXT ACTION' column for the most recent batch is circled in red.

DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
03/19/2015 14:29	Search	147	900	LEA	PEP	File Uploaded. Begin Validation Stage	22 of 22	VALIDATE
03/18/2015 16:22	Search	104	900	LEA	TCMS	Download Search results	1 of 1	DOWNLOAD

- If any data errors are found during validation, the records containing the data errors are auto-canceled. Those records will not be included in the rest of the search process.
- The records in the batch will also auto-cancel if they include the ID.

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

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

10. The application will return to the Batch Search page displaying the status of the process, along with the *Batch Info* link. The application will find one of the following for each record in a batch:
- No matching staff - The **StaffID** column will be blank for these types of records in the downloaded file.
 - A single matching staff - The **StaffID** column will contain the State ID of the matching staff for these types of records in the downloaded file.
 - Multiple matching staff records – The record will be auto-canceled and will not be listed in the downloaded file.
 - One or more near matching staff records – The record will be auto- canceled and will not be listed in the downloaded file.

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



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

Batch Search

UPLOAD BATCH FILE EXTRACT & DOWNLOAD BATCH

FILTER

PROCESSING STAGE: All FROM: 02/16/2015 TO: 03/19/2015 BATCH NUMBER: 147 FILTER RESULTS

DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
03/19/2015 14:29	Search	147	900	LEA	PEP	Download Search results	2 of 22	DOWNLOAD
03/18/2015 16:22	Search	104	900	LEA	TCMS	Download Search results	1 of 1	DOWNLOAD

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

Batch Search - Download ID Batch

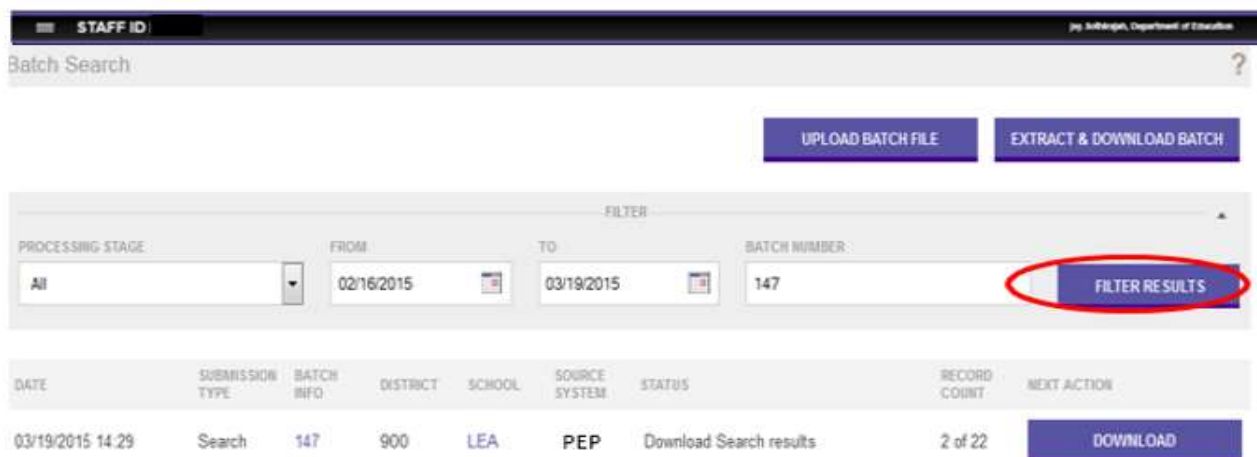
UPLOAD DATE	BATCH INFO	STATUS	RECORD COUNT	NEXT ACTION
03/19/2015 14:29	147	File Extract Complete	2	DOWNLOAD

BACK TO BATCH SEARCH

- The format of the downloaded file will be exactly the same as the staff Batch File and each staff record will include the StaffID that was assigned to that staff.

Viewing Previous Batch Searches

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



The screenshot shows the 'Batch Search' interface. At the top, there is a header with 'STAFF ID' and 'Jag. SubBorough, Department of Education'. Below the header, the page title 'Batch Search' is displayed. Two buttons are visible: 'UPLOAD BATCH FILE' and 'EXTRACT & DOWNLOAD BATCH'. A filter section is present with the following fields: 'PROCESSING STAGE' (set to 'All'), 'FROM' (02/16/2015), 'TO' (03/19/2015), and 'BATCH NUMBER' (147). A red circle highlights the 'FILTER RESULTS' button. Below the filter section is a table with the following data:

DATE	SUBMISSION TYPE	BATCH INFO	DISTRICT	SCHOOL	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
03/19/2015 14:29	Search	147	900	LEA	PEP	Download Search results	2 of 22	DOWNLOAD

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

Displaying 1 - 10 of 12

<< FIRST < PREV PAGE 1 OF 2 NEXT > LAST >>

Extracting & Downloading Batch Search Files

The **Extract & Download** component can be accessed from within the **Batch Search** component. The **Extract & Download** component is detailed further in the [Extract & Download](#).

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

The screenshot shows the 'Batch Search' interface. At the top, there is a header with 'STAFF ID' and 'By All Rights, Department of Education'. Below the header is a search bar containing 'Batch Search'. To the right of the search bar are two buttons: 'UPLOAD BATCH FILE' and 'EXTRACT & DOWNLOAD BATCH', with the latter circled in red. Below the buttons is a filter section with a 'FILTER' dropdown. The filter section includes a 'PROCESSING STAGE' dropdown set to 'All', 'FROM' and 'TO' date pickers set to '02/16/2015' and '03/19/2015' respectively, and a 'BATCH NUMBER' input field. A 'FILTER RESULTS' button is located to the right of the filter section. Below the filter section is a table with the following columns: DATE, SUBMISSION TYPE, BATCH INFO, DISTRICT, SCHOOL, SOURCE SYSTEM, STATUS, RECORD COUNT, and NEXT ACTION. The table contains two rows of data. The first row has DATE '03/19/2015 14:29', SUBMISSION TYPE 'Search', BATCH INFO '147', DISTRICT '900', SCHOOL 'LEA', SOURCE SYSTEM 'PEP', STATUS 'Download Search results', RECORD COUNT '2 of 22', and NEXT ACTION 'DOWNLOAD'. The second row has DATE '03/18/2015 16:22', SUBMISSION TYPE 'Search', BATCH INFO '104', DISTRICT '900', SCHOOL 'LEA', SOURCE SYSTEM 'TCMS', STATUS 'Download Search results', RECORD COUNT '1 of 1', and NEXT ACTION 'DOWNLOAD'. At the bottom of the table, there is a pagination bar showing 'Displaying 1 - 2 of 2' and navigation links: '<< FIRST', '< PREV', 'PAGE 1 OF 1', 'NEXT >', and 'LAST >>'.

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

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

STAFF ID HOME jyo. Software, Department of Education

FILTER

SUBMISSION TYPE: Search
 EXTRACT TYPE: IDs Found - Search
 FROM: 02/16/2015
 TO: 03/19/2015
 SORT: Upload Date Desc
 FILTER RESULTS

UPLOAD DATE	BATCH INFO	STATUS	RECORD COUNT	NEXT ACTION
03/19/2015 14:29	147	IDs Found - Search	2	EXTRACT RECORDS ADD TO DOWNLOAD CART
03/18/2015 16:22	104	IDs Found - Search	1	EXTRACT RECORDS ADD TO DOWNLOAD CART

Displaying 1 - 2 of 2

BACK TO BATCH SEARCH VIEW DOWNLOAD CART



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

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

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

STAFF ID jyo. Software, Department of Education

Extract and Download Batch - **Batch**

UPLOAD DATE	BATCH INFO	STATUS	RECORD COUNT	NEXT ACTION
03/19/2015 14:29	147	File Extract Complete	2	DOWNLOAD

EXTRACT ANOTHER BATCH

For more information on using the Download Cart please refer to [Download Batch](#).

DOWNLOAD > BATCH

About Download Batch

Users can search for staff records with a batch file by clicking the **Batch** link under **DOWNLOAD** from the Main Menu.



This module allows users to:

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

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

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

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

Steps

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

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

The screenshot shows the 'Extract and Download Batch' interface. At the top, there is a header with 'STAFF ID' and 'Jy. Allington, Department of Education'. Below the header, the page title 'Extract and Download Batch' is displayed. The main area contains a filter section with the following options:

- DISTRICT**: Allentown School District [900]
- SCHOOL**: (Empty field)
- SUBMISSION TYPE**: All
- EXTRACT TYPE**: IDs Assigned
- FROM**: 02/18/2015
- TO**: 03/19/2015
- SORT**: Upload Date Desc
- FILTER RESULTS** button (highlighted with a red circle)

Below the filter section is a table with the following columns: UPLOAD DATE, BATCH INFO, DISTRICT, SCHOOL, STATUS, RECORD COUNT, and NEXT ACTION. The table contains three rows of data:

UPLOAD DATE	BATCH INFO	DISTRICT	SCHOOL	STATUS	RECORD COUNT	NEXT ACTION
03/19/2015 14:03	145	900	LEA	ID(s) Assigned.	1	EXTRACT RECORDS ADD TO DOWNLOAD CART
03/19/2015 10:38	125	900	LEA	ID(s) Assigned.	1	EXTRACT RECORDS ADD TO DOWNLOAD CART
03/19/2015 10:38	124	900	LEA	ID(s) Assigned.	1	EXTRACT RECORDS ADD TO DOWNLOAD CART

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

Downloading a File

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

1. Perform steps 1 through 5 from the above Filtering the List of Downloads section.
2. Click the **EXTRACT RECORDS** button for the appropriate batch.

The screenshot shows the 'Extract and Download Batch' interface. At the top, there is a header with 'STAFF ID' and 'Allentown School District'. Below the header is a filter section with the following fields:

- DISTRICT: Allentown School District (900)
- SCHOOL: (empty)
- SUBMISSION TYPE: All
- EXTRACT TYPE: IDs Assigned
- FROM: 02/16/2015
- TO: 03/19/2015
- Sort: Upload Date Desc
- A 'FILTER RESULTS' button is located to the right of the filter fields.

Below the filter section is a table with the following columns: UPLOAD DATE, BATCH INFO, DISTRICT, SCHOOL, STATUS, RECORD COUNT, and NEXT ACTION. The table contains three rows of data:



UPLOAD DATE	BATCH INFO	DISTRICT	SCHOOL	STATUS	RECORD COUNT	NEXT ACTION
03/19/2015 14:03	145	900	LEA	ID(s) Assigned	1	EXTRACT RECORDS (circled in red) ADD TO DOWNLOAD CART
03/19/2015 10:38	125	900	LEA	ID(s) Assigned	1	EXTRACT RECORDS ADD TO DOWNLOAD CART
03/19/2015 10:38	124	900	LEA	ID(s) Assigned	1	EXTRACT RECORDS ADD TO DOWNLOAD CART

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

The screenshot shows the 'Extract and Download Batch - Batch' interface. At the top, there is a header with 'STAFF ID' and 'Allentown School District'. Below the header is a table with the following columns: UPLOAD DATE, BATCH INFO, STATUS, RECORD COUNT, and NEXT ACTION. The table contains one row of data:

UPLOAD DATE	BATCH INFO	STATUS	RECORD COUNT	NEXT ACTION
03/19/2015 14:03	145 (circled in red)	File Extract Complete	1 (circled in red)	DOWNLOAD (circled in red)

A callout box points to the 'RECORD COUNT' column with the text: "Represents the total number of detail records in this download." Below the table, there is a button labeled 'EXTRACT ANOTHER BATCH' (circled in red).

4. Once the file is downloaded, users can return to  to extract another batch. To extract another batch, users should click the  button.



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

Downloading Multiple Files

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

1. Perform steps 1 through 5 from the above **Filtering the List of Downloads** section.
2. Click the **ADD TO DOWNLOAD CART** button for the appropriate batch.

UPLOAD DATE	BATCH INFO	DISTRICT	SCHOOL	STATUS	RECORD COUNT	NEXT ACTION
03/19/2015 14:03	145	900	LEA	ID(s) Assigned.	1	EXTRACT RECORDS ADD TO DOWNLOAD CART
03/19/2015 10:38	125	900	LEA	ID(s) Assigned.	1	EXTRACT RECORDS ADD TO DOWNLOAD CART
03/19/2015 10:38	124	900	LEA	ID(s) Assigned.	1	EXTRACT RECORDS ADD TO DOWNLOAD CART

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

UPLOAD DATE	BATCH INFO	RECORD COUNT
03/19/2015 10:38	125	1
03/19/2015 14:03	145	1

Each row in the list represents a different batch that was added to the download cart.

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

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

STAFF ID jg. Williams, Department of Education

Download Cart - IDs Assigned Extract Type

WARNING:
One or more of batches selected were created in different versions

UPLOAD DATE	BATCH INFO	RECORD COUNT
<input type="checkbox"/> 04/29/2015 14:50	99	1
<input type="checkbox"/> 04/30/2015 13:09	123	1

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

STAFF ID jg. Williams, Department of Education

Download Cart - IDs Assigned Extract Type

UPLOAD DATE	BATCH INFO	RECORD COUNT
<input type="checkbox"/> 03/19/2015 10:38	125	1
<input type="checkbox"/> 03/19/2015 14:03	145	1

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

UPLOAD DATE	BATCH INFO	STATUS	RECORD COUNT	NEXT ACTION
03/19/2015 10:38	125, 145	File Extract Complete	2	DOWNLOAD

[EXTRACT ANOTHER BATCH](#)

Downloading with Options

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

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

UPLOAD DATE	BATCH INFO	RECORD COUNT
<input type="checkbox"/> 03/19/2015 10:38	125	1
<input type="checkbox"/> 03/19/2015 14:03	145	1

[BACK TO EXTRACT & DOWNLOAD](#)
[CLEAR CART](#)
[REMOVE SELECTED](#)
[DOWNLOAD WITH OPTIONS](#)
[DOWNLOAD CART](#)

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

DOWNLOAD OPTIONS

Template: eScholar Uniq-ID® v3.0

Delimiter: TAB

Qualifier:

Date Format: mm/dd/yyyy

Include Header/Footer: Yes No

(*) Required

BACK

DOWNLOAD

- a. *Template*: eScholar Staff-ID® v3.0
- b. *Field Delimiter*: The options for this selection are Tab or Comma.
- c. *Field Qualifier*: The options for this selection are “and”.
- d. *Date Format*: The options for this selection are:
 - mm/dd/yyyy
 - mm/d/yyyy
 - ISO YYYY-MM-DD
 - m/d/yyyy
 - m/dd/yyyy

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



- e. *Include Header / Footer*. The options for this selection are Yes and No. When No is selected, the header and footer will not be included in the extracted file.
4. Select the download options.
 5. Click the **DOWNLOAD** button.

Removing Batches from the Download Cart

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

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

UPLOAD DATE	BATCH INFO	RECORD COUNT
<input checked="" type="checkbox"/> 03/19/2015 10:38	122	1
<input type="checkbox"/> 03/19/2015 10:38	124	1
<input checked="" type="checkbox"/> 03/19/2015 10:38	125	1
<input type="checkbox"/> 03/19/2015 14:03	145	1

Buttons: BACK TO EXTRACT & DOWNLOAD, CLEAR CART, REMOVE SELECTED, DOWNLOAD WITH OPTIONS, DOWNLOAD CART

Viewing the Download Cart

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

STAFF ID Jig Software, Department of Education

Extract and Download Batch ?

FILTER

DISTRICT: Allentown School District [900] SCHOOL:

SUBMISSION TYPE: All EXTRACT TYPE: IDs Assigned FROM: 02/16/2015 TO: 03/19/2015 SORT: Upload Date Desc **FILTER RESULTS**

UPLOAD DATE	BATCH INFO	DISTRICT	SCHOOL	STATUS	RECORD COUNT	NEXT ACTION
03/19/2015 14:03	145	900	LEA	ID(s) Assigned	1	EXTRACT RECORDS ADD TO DOWNLOAD CART
03/19/2015 10:38	125	900	LEA	ID(s) Assigned	1	EXTRACT RECORDS ADD TO DOWNLOAD CART
03/19/2015 10:38	124	900	LEA	ID(s) Assigned	1	EXTRACT RECORDS ADD TO DOWNLOAD CART
03/19/2015 10:38	123	900	LEA	ID(s) Assigned	1	EXTRACT RECORDS ADD TO DOWNLOAD CART
03/19/2015 10:38	122	900	LEA	ID(s) Assigned	1	EXTRACT RECORDS ADD TO DOWNLOAD CART
03/19/2015 10:38	121	900	LEA	ID(s) Assigned	1	EXTRACT RECORDS ADD TO DOWNLOAD CART
03/19/2015 10:38	120	900	LEA	ID(s) Assigned	1	EXTRACT RECORDS ADD TO DOWNLOAD CART
03/19/2015 07:24	106	900	LEA	ID(s) Assigned	1	EXTRACT RECORDS ADD TO DOWNLOAD CART

Displaying 1 - 8 of 8 ← FIRST < PREV PAGE 1 OF 1 NEXT > LAST →

VIEW DOWNLOAD CART

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

STAFF ID Jig Software, Department of Education

Download Cart - IDs Assigned Extract Type

UPLOAD DATE	BATCH INFO	RECORD COUNT
<input type="checkbox"/> 03/19/2015 10:38	124	1
<input type="checkbox"/> 03/19/2015 14:03	145	1

DOWNLOAD > LOCATION

About Download Location

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



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

This feature will allow user to perform the following actions:

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

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

Searching for a Location

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

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

STAFF ID HOME Jay Seethirajah, Department of Education

Download - Location ?

FILTER

CODE OR NAME <input type="text" value="Department of Education"/>	ENDING SCHOOL SESSION YEAR <input type="text" value="2020"/>	<input type="button" value="FILTER RESULTS"/>
--	---	---

LEA CODE	SCHOOL/SITE CODE	SCHOOL NAME	RECORD COUNT	NEXT ACTION
SEA		Department of Education	455650	<input type="button" value="DOWNLOAD"/>

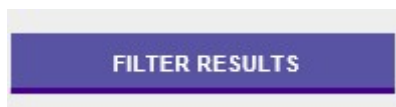
Displaying 1 - 1 of 1

 PAGE 1 OF 1

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



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



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

Steps

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

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

The screenshot shows the 'STAFF ID HOME' interface. At the top, there is a navigation bar with 'STAFF ID HOME' on the left and 'Jay Solbrig, Department of Education' on the right. Below this is a header 'Download - Location'. A filter section contains two input fields: 'CODE OR NAME' with the value 'Department of Education' and 'ENDING SCHOOL SESSION YEAR' with the value '2020'. A 'FILTER RESULTS' button is to the right. Below the filter is a table with the following columns: 'LEA CODE', 'SCHOOL/SITE CODE', 'SCHOOL NAME', 'RECORD COUNT', and 'NEXT ACTION'. The table contains one row with values: 'SEA', 'Department of Education', and '455650'. The 'NEXT ACTION' column for this row contains a 'DOWNLOAD' button, which is circled in red. At the bottom of the table, it says 'Displaying 1 - 1 of 1' and 'PAGE 1 OF 1'.

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

The screenshot shows the 'STATE ID' interface. At the top, there is a navigation bar with 'STATE ID' on the left and '0000supr, Allentown School District' on the right. Below this is a header 'Download Options - Multiple Batches'. A section titled 'DOWNLOAD OPTIONS' contains a form with the following fields: 'Template' (dropdown menu with 'eScholar Uniq-ID® v2.1'), 'Delimiter' (dropdown menu with 'TAB'), 'Qualifier' (dropdown menu), 'Date Format' (dropdown menu with 'mm/dd/yyyy'), and 'Include Header/Footer' (radio buttons for 'Yes' and 'No', with 'No' selected). At the bottom of the form, there are two buttons: 'BACK' and 'DOWNLOAD'. A note '(*) Required' is visible on the left side of the form.

6. The **Download Options** page will display the available options in a form, allowing the user to select specific download options. The step for Downloading with Options for Download By Location is the exact same as the **Extract & Download - Download with Options** section above. Users can select from the following options:

- a. *Template* - eScholar Staff-ID® v3.0
- b. *Field Delimiter*: The options for this selection are Tab or Comma.
- c. *Field Qualifier*: The options for this selection are “and”.
- d. *Date Format*: The options for this selection are:
 - mm/dd/yyyy
 - mm/d/yyyy

● ISO YYYY-MM-DD

● m/d/yyyy

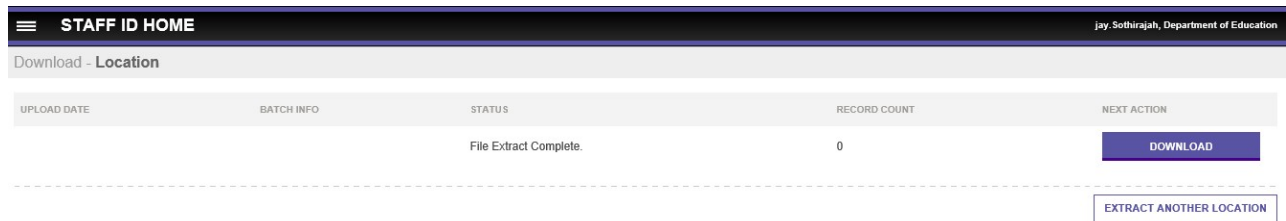
● m/dd/yyyy

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

4. Select the appropriate download options.

5. Click the **DOWNLOAD** button.

6. The Download Location download page will be displayed. Click the **here** link in the Status column.



UPLOAD DATE	BATCH INFO	STATUS	RECORD COUNT	NEXT ACTION
		File Extract Complete.	0	DOWNLOAD

EXTRACT ANOTHER LOCATION

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

LOG OUT

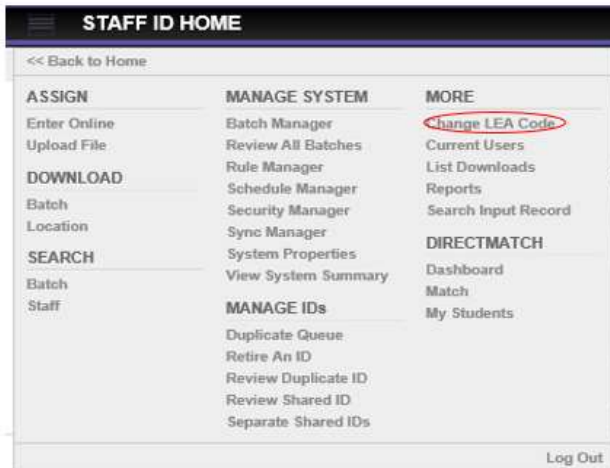
About Log Out

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



CHANGE DISTRICTS

About Change District



Users can change their current location by clicking the **Change LEA Code** link under **MORE** in the Admin Menu.

This feature allows users to:

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

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

Changing a District Selection – Steps

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



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

Searching for a District - Steps

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

The screenshot shows the 'Change LEA Code' interface. At the top, there is a dark blue header with 'STAFF ID HOME' on the left and 'jay. Sethirajah, Department of Education' on the right. Below the header is a light gray bar with 'Change LEA Code:' and a question mark. The main content area has a white background with a 'CHANGE LEA CODE' title. There are two input fields: 'Filter Selection:' with a text input box and a blue 'FILTER' button circled in red; and 'LEA Code:' with a dropdown menu showing 'Department of Education [SEA LEA]'. At the bottom, there is a dashed line, a '(*) Required' label, a 'CLEAR' button, and a 'SELECT THIS LEA CODE' button.

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

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

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

NEAR MATCH NOTIFICATIONS

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

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

AUTOMATIC FILE PROCESSING (AFP)

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

APPENDIX A – BATCH INFO WINDOW

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

The screenshot shows the Staff ID Home application interface. At the top, there is a navigation bar with "STAFF ID HOME" and "Jay Sulzinger, Department of Education". Below this is a "Home" link. The main area features a "FILTER" section with several input fields: "LEA:" (Allentown School District [009]), "SCHOOL/SITE CODE:", "BATCH NUMBER:", "SUBMISSION TYPE:" (All), "PROCESSING STAGE:" (All), "FROM:" (03/31/2015), "TO:" (04/30/2015), and "SORT:" (Upload Date Desc). A "FILTER RESULTS" button is located to the right of the filter section. Below the filter section is a table with the following columns: "UPLOAD DATE", "SUBMISSION TYPE", "BATCH INFO", "LEA", "SCHOOL/SITE CODE", "SOURCE SYSTEM", "STATUS", "RECORD COUNT", and "NEXT ACTION". The table contains two rows of data. The first row shows an upload date of 04/30/2015 13:11, submission type Online, batch info 124, LEA 009, school/site code LEA, source system PEP, status ID(s) Assigned, record count 1 of 1, and a "DOWNLOAD UNIQ ID" button. The second row shows an upload date of 04/30/2015 12:44, submission type File, batch info 122 (circled in red), LEA 009, school/site code LEA, source system PEP, status ID(s) Assigned, record count 3 of 3, and a "DOWNLOAD UNIQ ID" button.

UPLOAD DATE	SUBMISSION TYPE	BATCH INFO	LEA	SCHOOL/SITE CODE	SOURCE SYSTEM	STATUS	RECORD COUNT	NEXT ACTION
04/30/2015 13:11	Online	124	009	LEA	PEP	ID(s) Assigned.	1 of 1	DOWNLOAD UNIQ ID
04/30/2015 12:44	File	122	009	LEA	PEP	ID(s) Assigned.	3 of 3	DOWNLOAD UNIQ ID

The **Batch Info window** that pops up contains four sections/tabs:

1. Batch Statistics
2. Processing Info
3. Download Info
4. General Info

Batch Statistics Tab

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

Batch Information: **Batch 122**

STATISTICS PROCESSING DOWNLOADS GENERAL

ID ASSIGNMENT COMPLETE

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

CLOSE WINDOW

Records will be grouped by status and ID Assignment stage. Please see [Appendix D](#) for a list of all statuses and their groupings.

Processing Info Tab

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

Batch Information: **Batch 122**

STATISTICS **PROCESSING** DOWNLOADS GENERAL

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

CLOSE WINDOW

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

Download Info Tab

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

Batch Information: **Batch 122**

STATISTICS PROCESSING **DOWNLOADS** GENERAL

USER ID	DOWNLOAD DATE
superuser	04/30/2015 01:25:30 PM

CLOSE WINDOW

General Info Tab

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

Batch Information: **Batch 122**

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

CLOSE WINDOW

APPENDIX B – BATCH RECORD STATUSES

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

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

APPENDIX C – CANCELED RECORDS ERROR MESSAGES

Canceled Record Comments

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

Canceled Record Comments
Alternate ID is invalid at validation.
Date Of Birth is not present.
Date Of Birth is not valid.(XXXinvalid valueXXX)
District Code is not present.
District Code is not valid.(XXXinvalid valueXXX)
First Name is not present
First Name is not valid.(XXXinvalid valueXXX)
Gender is not present.
Gender is not valid.(XXXinvalid valueXXX)
Classification Level is not present
Classification Level is not valid. (XXXinvalid valueXXX)
Last Name is not present.
Last Name is not valid.(XXXinvalid valueXXX)
Local staffID is not present.
Local staffID 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)

Canceled Record Comments
User is not authorized to submit staff for the specified district.(XXXinvalid valueXXX)
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 – BATCH SEARCH FILE FORMAT V3.0

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

Louisiana StaffID v3.0 Upload Format

File Name

The filenames of the Staff 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 Staff 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'.
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 in the Source System table. System administrators manage the Source System table. Examples: PEP CCCBC TCMS NSECD Compass
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.
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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 Staff data and should contain the following fields:

#	Field Name	Required	System - Data type	Used for Matching	Notes/Format Details
1	Record Type	Yes	Char(2)	n/a	Always 'ID'.
2	School/Site Code	Yes	Char(6)	No	School the staff has been assigned.
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 staff lives (01-69).
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.
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/Format Details
10	Classification Level	Yes	Char(2)	No	State defined employee status code Source: PEP 01 – School Board Employee 02 – Post Secondary Employee 03 – Contracted Professional Services Person 04 – Third Party Contract Employee 05 – State Employee (Classified) 06 – State Employee (Unclassified) 07 – Resident Teacher
11	Local StaffID	Yes	VarChar(20)	No	ID used in the local school/site/submitting system to uniquely identify the Staff. This field should NOT be used for Social Security Number.
12	Social Security Number	Yes	Char(9)	Yes	SSN is required for matching.
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: 1 st Position: HI7 - Hispanic Indicator 2 nd Position: AM7 - American Indian or Alaskan Native Indicator 3 rd Position: AS7- Asian Indicator 4 th Position: BL7 - Black Indicator 5 th Position: PI7 - Native Hawaiian or Other Pacific Islander indicator 6 th Position: WH7 - White Indicator

#	Field Name	Required	System - Data type	Used for Matching	Notes/Format Details
14	State StaffID	No	Char(10)	No	This is the Louisiana StaffID assigned to the staff. This value should be null if the staff has not yet been assigned a StaffID in the eScholar Secure ID system. Once a StaffID has been assigned, all subsequent submissions for that staff should include this value.
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 7/1/2024 - 6/30/2025 results in Ending school session year of 2025 .
17	Alternate Last Name	No	VarChar(60)	Yes/No	This field should be used for the birth date, surname, alternate last name, or former last name of the staff. 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	Alternate ID	No	VarChar(50)	No	For StaffID: ID used in the system defined in the Alternate Source field. If Alternate Source is provided, this field is required.
19	Alternate Source	No	VarChar(60)	No	For StaffID: Source Name for the Alternate ID field. Can be used to track additional local identifiers. If Alternate ID is required, this field is required. Examples: PEP CCCBC Compass TCMS NSECD
20	State UserID	No	VarChar(60)	No	This field is used for EdLink security for approved users who need access to EdLink 360.
21	Staff Email	No	VarChar(60)	No	Staff email address.
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.

#	Field Name	Required	System - Data type	Used for Matching	Notes/Format Details
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	RESERVED	No	Varchar(25)	No	Not Used by LDOE. Leave this field 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)	No	VarChar(50)	Yes	Physical Street Address of the Staff
42	Street Address 2 (Physical)	No	VarChar(30)	Yes	Physical Address 2 (e.g. Apartment #)
43	City (Physical)	No	VarChar(30)	Yes	Physical City Address of the Staff
44	State (Physical)	No	Char(2)	Yes	2 Letter Abbreviation code of the State Where the Staff lives. Example: LA – Louisiana
45	Zip Code (Physical)	No	Char(9)	Yes	Physical Zip Code of the Staff’s Address 5 digits - or - 9 digits (last 4 cannot be all zeroes)
46	RESERVED	No	VarChar(22)	No	Not Used by LDOE. Leave Blank
47	RESERVED	No	VarChar(20)	No	Not Used by LDOE. Leave Blank
48	RESERVED	No	datetime	No	Not Used by LDOE. Leave Blank

49	RESERVED	No	VarChar(20)	No	Not Used by LDOE. Leave Blank
50	RESERVED	No	VarChar(20)	No	Not Used by LDOE. Leave Blank
51	RESERVED	No	VarChar(125)	No	Not Used by LDOE. Leave Blank
52	RESERVED	No	VarChar(25)	No	Not Used by LDOE. Leave Blank
53	RESERVED	No	VarChar(20)	No	Not Used by LDOE. Leave Blank
54	RESERVED	No	VarChar(2)	No	Not Used by LDOE. Leave Blank

#	Field Name	Required	System - Data type	Used for Matching	Notes/Format Details
55	Submission Purpose	Yes	Char(3)	No	This field should always include code 001 on all submissions. 001 – Assignment
56	Person Type	Yes	Char(2)	No	This field should always include code 02 on all submissions. 02 – Staff
57	RESERVED	No	VarChar(1)	No	Not Used by LDOE. Leave Blank
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	No	Numeric(4,0)	No	This field is the internal number of current active locations for the ID Record Type and is provided as a number count in the output file. This field should be blank on input. Any values on input will be ignored.
71	RESERVED	No	datetime	No	Not Used by LDOE. Leave Blank

72	Match Score	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	No	VarChar(255)	No	This field is the internal transaction status result for the record and is provided in the output file. This field should be blank on input. Any values on input will be ignored.

#	Field Name	Required	System - Data type	Used for Matching	Notes/Format Details
74	Location Status	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	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	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	No	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.

APPENDIX E – STAFF SPLIT ID AND RETIRE ID TEMPLATES

Split ID - Two different staff may have inadvertently been assigned the same StaffID. This situation occurs when a user accidentally selects “Assign ID” instead of “Create ID” while resolving near matches. The system allows authorized administrators to separate IDs i.e. split the ID. The Split ID request form is located in the [eScholar Support](#) page. Please complete the Split IDs request form and mail it to Wanggan.Yang@la.gov.

Retire ID - The same person may have inadvertently been assigned two StaffIDs. This situation occurs when a user accidentally selects “Create ID” instead of “Assign ID” while resolving near matches. The system allows authorized administrators to retire IDs. The Retire ID request form is located in the [eScholar Support](#) page. Please complete the Retire IDs request form and mail it to Wanggan.Yang@la.gov.

APPENDIX F – UPDATE HISTORY

03/10/2020	<ul style="list-style-type: none"> ● Staff ID was changed to StaffID throughout the document ● Student was changed to Staff in Appendix D
03/11/2020	<ul style="list-style-type: none"> ● The year on the cover page was changed from 2020-2021 to 2022-2023 ● Information about StaffID Split ID and Retire ID was added to Appendix E ● Appendix F was made the Update History
05/01/2020	<ul style="list-style-type: none"> ● Added no match, near match and match probability ● Added data collection chart ● Added eScholar StaffID URL and user account information
06/01/2020	<ul style="list-style-type: none"> ● SN was changed from not required to require for matching
06/30/2020	<ul style="list-style-type: none"> ● AQ section added to Appendix F ● Appendix G became Update History
07/01/2021	<ul style="list-style-type: none"> ● Added links for eScholar FTP ● Added links for Security Coordinators User Admin Portal and instructions ● Changed the update date from July 1, 2020 to July 1, 2021 ● Added links to SplitID and RetireID templates
11/12/2021	<ul style="list-style-type: none"> ● Updated the StateUserID field from varchar 25 to 60 in Appendix D field # 20
07/01/2022	<ul style="list-style-type: none"> ● Appendix F - FAQ section was removed to become a stand-alone document ● Appendix G – Updated History was renamed to Appendix F
08/30/2023	<ul style="list-style-type: none"> ● The year on the cover page was changed from 2022-2023 to 2023-2024 ● Changed the update date from July 1, 2021 to August 30, 2023

07/17/2024	<ul style="list-style-type: none">● The year on the cover page was changed from 2023-2024 to 2024-2025● Changed the update date from August 30, 2023 to July 17, 2024● Staff Email field was added to column #21.● Updated Appendix E link.
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