



eScholar[®]

Bringing Data Together

eScholar Uniq-ID[®]

Person ID[™]

User Guide

Version 2023

Last Updated: July 1, 2026

Bringing Data Together.

Table of Contents



• OVERVIEW

PURPOSE	7
CAPABILITIES	7
BENEFITS	8
DEFINITIONS	9
FEATURE OVERVIEW	11
UNIQID FLOW	13
SECURITY	18
SYSTEM REQUIREMENTS	19
 GETTING STARTED	20
OVERVIEW	20
LOGGING IN	21
LESSON: HOW TO LOG IN	22
RESETTING A PASSWORD	23
LESSON: HOW TO RESET A PASSWORD	23
USER INTERFACE OVERVIEW	25
LESSON: HOW TO SORT DATA	31
LESSON: HOW TO VIEW RECORDS USING PAGINATION	31
LESSON: HOW TO FILTER DATA	31
 HOME/DASHBOARD	33
OVERVIEW	33
SYSTEM MESSAGE PANEL	34
PENDING WORK PANEL	35
QUICK ACTIONS PANEL	35
RECENT ACTIVITY PANEL	35
LESSON: HOW TO REFRESH RECENT ACTIVITY DATA	44
LESSON: HOW TO DRILL INTO MATCH HISTORY	44
LESSON: HOW TO DRILL INTO THE NEAR MATCH LIST PAGE	48
LESSON: HOW TO DRILL INTO THE BATCH PROFILE	49
LESSON: HOW TO DOWNLOAD BATCH RESULTS FROM A BATCH PROFILE	51
LESSON: HOW TO DRILL INTO THE TRANSACTION PROFILE	53
LESSON: HOW TO DOWNLOAD A TRANSACTION FROM THE TRANSACTION PROFILE	54
LESSON: HOW TO DRILL INTO THE LOCATION PROFILE	56
 MATCH HISTORY	57
OVERVIEW	57
FILTER	58
BATCHES TAB	67
TRANSACTIONS TAB	70
LESSON: HOW TO FILTER THE DATA	74
LESSON: HOW TO REFRESH MATCH HISTORY DATA	75
LESSON: HOW TO ACCESS THE RESOLVE NEAR MATCH PROCESS	76
LESSON: HOW TO DRILL INTO TRANSACTION PROFILE	77
LESSON: HOW TO DRILL INTO BATCH PROFILE	78
LESSON: HOW TO DRILL INTO LOCATION PROFILE	79
 MATCH OPTIONS	80

OVERVIEW	80
PERSON MATCH: UPLOAD FILE	80
LESSON: HOW TO MATCH FROM UPLOAD FILE	81
 ADD PERSON	83
OVERVIEW	83
FORM FIELDS	84
LESSON: HOW TO MATCH FROM ADD PERSON	97
 MATCH RESULTS	98
OVERVIEW	98
LESSON: HOW TO VIEW MATCH RESULTS	102
 RESOLVE NEAR MATCHES	104
OVERVIEW	104
NEAR MATCH LIST	106
COMPARE RECORDS	118
LESSON: HOW TO ACCESS THE NEAR MATCH LIST	135
LESSON: HOW TO FILTER THE NEAR MATCH LIST	136
LESSON: HOW TO RESOLVE NEAR MATCHES	138
 SEARCH	144
OVERVIEW	144
SEARCH BY PERSON	145
SEARCH BY ID	146
SEARCH BY LOCATION	148
SEARCH BY FILE	150
SEARCH RESULT	152
DOWNLOAD - SEARCH INFORMATION	154
LESSON: HOW TO SEARCH BY PERSON.	157
LESSON: HOW TO SEARCH BY ID	159
LESSON: HOW TO SEARCH BY LOCATION	161
LESSON: HOW TO DOWNLOAD PERSON RECORDS BY LOCATION	162
LESSON: HOW TO SEARCH BY FILE	164
 PERSON PROFILE	166
OVERVIEW	166
PERSON PROFILE HEADER	167
PERSON PROFILE - OVERVIEW TAB	169
PERSON PROFILE — MASTER RECORD TAB	172
PERSON PROFILE — HISTORY RECORDS TAB	181
PERSON PROFILE — MERGED RECORDS TAB	182
LESSON: HOW TO ACCESS A PERSON PROFILE BY A PERSON SEARCH	183
LESSON: HOW TO EDIT A PERSON PROFILE	185
 BATCH PROFILE	189
OVERVIEW	189

PROFILE HEADER	189
DETAILS TAB	190
DOWNLOAD TAB	195
LESSON: HOW TO ACCESS A BATCH PROFILE	199
LESSON: HOW TO GENERATE EXTRACT FILE FROM DOWNLOAD OPTIONS	200
 TRANSACTION PROFILE	203
OVERVIEW	203
PROFILE HEADER	204
DETAILS TAB	205
DOWNLOAD TAB	210
LESSON: HOW TO ACCESS A TRANSACTION PROFILE	214
LESSON: HOW TO GENERATE EXTRACT FILE FROM DOWNLOAD OPTIONS	215
 LOCATION PROFILE	218
OVERVIEW	218
PROFILE HEADER	219
DETAILS TAB	220
LESSON: HOW TO ACCESS A LOCATION PROFILE	223
LESSON: HOW TO DOWNLOAD PERSON RECORDS BY LOCATION	224



The content in this file is a **DRAFT** version. Content may be updated or removed prior to the final document that is provided with the Version 2023 General Release. Additionally, screenshots are subject to change prior to the final release.

● Overview

- [PurposeCapabilitiesBenefitsDefinitions](#)
- [Feature OverviewUniqID Flow](#)
- [Security](#)
- [System Requirements](#)

Purpose

The eScholar Uniq-ID® Person ID™ (UniqID) application is designed for educational agencies to assign and maintain UniqID statewide person identifiers (also referred to as “UniqID identifiers”). The term “person” is inclusive of Students, Staff Members, and other Person categories.

Capabilities

The UniqID application allows users to:

- Assign a unique identifier for every person in pre-kindergarten, kindergarten, elementary, and secondary public education depending on licensing.
- Generate random State IDs that are not constructed on any person demographic details of the person.
- Identify and locate a person from the statewide UniqID database either using the State ID, Alias ID, person demographics (e.g., last name), or with a batch file.
- Download unique identifiers by batch or by location.
- Search by batch, identifier, agency name, or person name.
- Multiple ways to submit person records to the UniqID application via batch mode, manual entry, Web Services, SIF, or Automatic File Processing.

Benefits

The UniqID application provides users with numerous benefits including:

- A powerful matching engine that uses complex logic to match person 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.

Definitions

Important definitions and terminology are described below.

TERM	DESCRIPTION
Batch	A Batch is created in the application when a user submits one or more records at a time using the File, AFP, APIs, or Add a Person. Each Batch created by the application is assigned a Batch ID to uniquely identify the submission. Each record in a Batch creates a single Transaction. For example, if an Upload File submission has 5 records a Batch is created with 5 Transactions.
Breadcrumb	Identifies the user's navigation path within UniqID. For example, Home > Match Options indicates that the user is on the Match Options page.
CDF	Customer Defined Field. A System Administrator can configure up to 11 CDFs in the system.
Deterministic Matching	One of many types of matching that is performed during the Match Process. This type of matching typically searches for an exact match between the two records.
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 history information for a person.
Local ID	The identifier that is created by the source of the data. For example, if the data is generated by the SIS, the Local ID would be the internal identifier created by that SIS.
Master Index Record	The Index Record is an individual record from the Master Index referencing one unique person.
Master Index	The Master Index is all unique records in UniqID. This data is provided by Districts/Schools for students currently enrolled in the location.

Match Candidate	When the application is performing the Match Process, a list of possible Match Candidates will be generated. This is a list of all potentially matching persons. The Match Score is utilized to determine if the Match Candidate is a match or not.
Match Decision	After a Match Score is applied to each Match Candidate, the Match Decision will be generated and can be a Match, No Match or Near Match. Each option is described below.
Match Probability	The probability that two person records are the same person.
Match Score	The Match Score will range from 0-100.
Near Match Thresholds	A System Administrator can configure a Lower Near Match Threshold and an Upper Near Match Threshold. This setting determines if a Match Candidate is forced to a Near Match.
Probabilistic Matching	One of many types of matching that is performed during the Match Process. This type of matching measures the probability that two records represent the same person using a statistical approach.
SIS	Student Information System. This refers to the local system that the District/School utilizes for student data.
State ID	The internal person identifier generated by UniqID. NOTE: Some implementations may not use the term State ID. Certain implementations use other terms specific to that application (e.g., UniqID). This term is configurable and the change will be seen on buttons and text labels throughout the application.
Submission Record / Transaction	A Submission Record / Transaction is created for each record that is processed by the application. A Transaction is created when an individual record is submitted via Add a Person and for each record created via Upload File.

	Each record in a Batch creates a single Transaction. For example, if an Upload File submission has 5 records a Batch is created with 5 Transactions. In all versions prior to Version 2023 Stage Records were created, but individual transactions were not accessible as easily as in Version 2023.
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Feature Overview

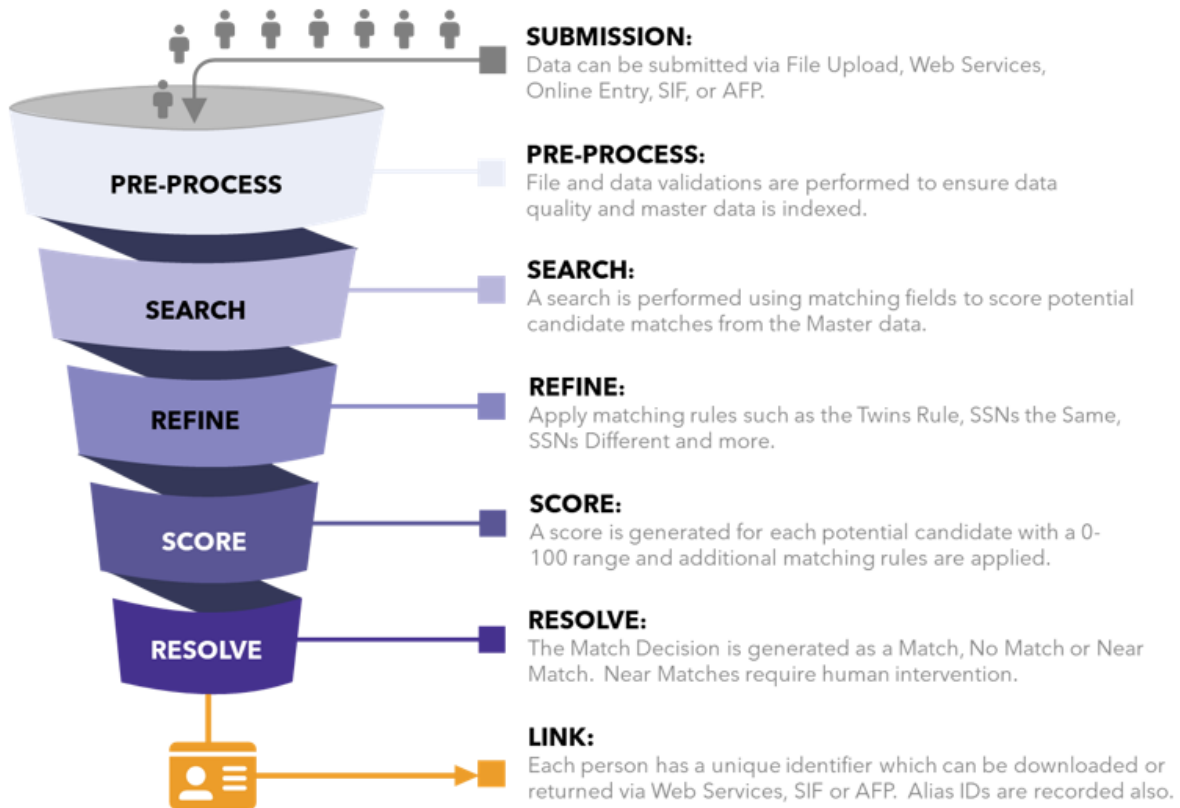
The table below provides an overview of each feature. Detailed information is provided within the chapters for each feature.

FEATURE	DESCRIPTION
Home/Dashboard	The Home/Dashboard feature enables users to view a System Message, Pending Work, Quick Actions, Recent Activity and Pending Near Matches.
Match Options	The Match Options feature enables users to begin the match process, view match information, and process near matches.
Search	The Search feature enables users to search for a user based on a variety of criteria. It does not initiate the match process.
Add a Person	The Add a Person feature enables an authorized user to add a new person to the master data. It will create a Batch, initiate the match process, and be processed as a transaction.

UniqID Flow

The application includes a proven Matching Process that includes 7 steps as outlined below. This process ensures that records are submitted to the application and results are returned to the user.

High Level Process Overview Diagram

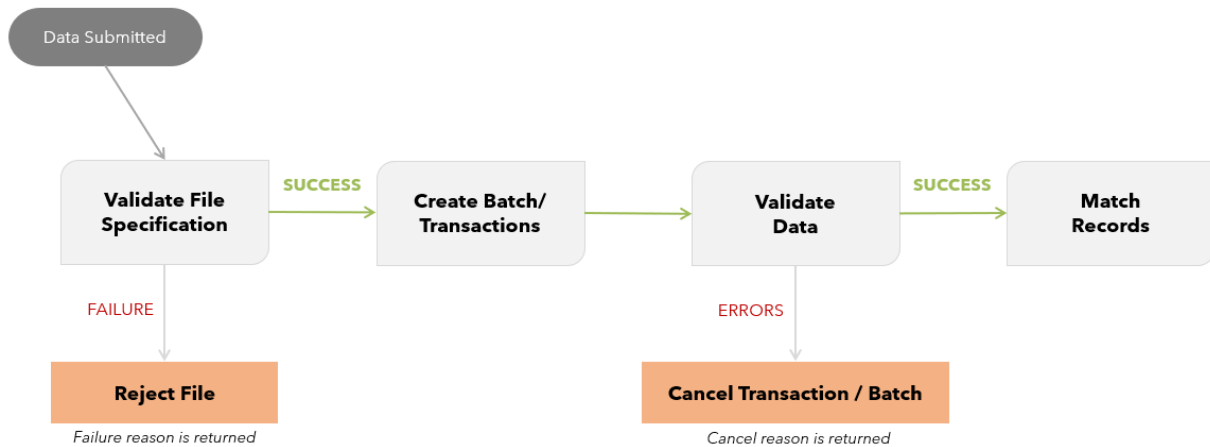


1. Submission (Initiated by a User)

All UniqID match requests are considered Submission Records / Transactions throughout the process. Data can be submitted in multiple methods- File Upload, APIs, Online Entry, or Automatic File Processing (AFP).

2. Pre-Process (Completed by the System)

Once the data is submitted, the submission goes into a pre-process. The Pre-Process includes the following steps including file and data validation, such as checking for valid values and ensuring the incoming records match the Submission Specification:



The file must pass file and data validation in order to perform matching. If the file contains errors, it is rejected or canceled. If the submission is successful, the application will create a Batch and one or many Transactions for each record in the file.

3. Search (Completed by the System)

After all file and data validation is completed, the system will begin the search process. Every person has a single master record in the master data. When performing matches, the system matches each submission record to all the records that are in the master data to find potential match candidates.

4. Refine (Completed by the System)

During the refine step, the system will apply Matching Rules, including Force Near Match Rules, Match Thresholds, and others, when identifying potential matches.

5. Score (Completed by the System)

After the system has performed the searches and applied the matching rules, each match candidate receives a match score. The score will range from 0-100.

6. Resolve (Completed by the System and/or Completed by the User)

During the resolve step, the system generates a match decision of Match, No Match, or Near Match based on the match score and matching rules. Some records may be forced to a Near Match based upon the rules applied during the Refine step. Near Matches require human intervention through the Near Match Resolution Process. Users will review each Near Match and either determine it is a Match, No Match, or Cancel the match.

Match Decisions

Match

There are two ways a Match decision can be generated. One is by the system during the Match Process and the other is by a user during the Near Match Resolution Process. A Match assigns an existing record's identifier to the Submission Record / Transaction, updates "Master" data (as appropriate), creates a History Record (if authorized), and inserts/updates Alias IDs.

- If the Submission Record matched to one Match Candidate with a Match Score above the Upper Near Match Threshold, the result is a system generated Match. In this case, the Submission Record will be linked to the Index Record. A record may be forced to Match during the Match Process based upon the Assignment Rules.
- If the Submission Record did not result in a system generated Match, a user can also make a Match Decision from the Near Match List or Compare Record page during the Near Match Resolution Process.

Near Match

If the result is a Near Match, the Submission Record matched to one or more Match Candidates with a Match Score between the Lower Near Match Threshold and the Upper Near Match Threshold, or it was forced to a Near Match due to an Assignment Rule. When a Near Match decision is made by the system, a user must intervene and make a Match or No Match decision by reviewing each match or canceling the Submission Record.

No Match

There are two ways a No Match decision can be generated. One is by the system during the Match Process and the other is by a user during the Near Match Resolution Process. No Match results in a new identifier from the ID Pool being applied to the submission record and inserts the Submission record into the Master Index.

Two ways to create a no match:

- If the Submission Record did not match any Match Candidates, indicating there were no Match Candidates above the Lower Near Match Threshold, the result is a No Match.
- If the Submission Record did not result in a system generated No Match, a user can also make a No Match Decision from the Near Match List or Compare Record page during the Near Match Resolution Process.

Match Thresholds



The Match Thresholds for determining if a record is a Match, No Match, or Near Match are configured by a System Administrator and may differ for each installation of the application.

7. Link (Completed by the System)

Submission records that are matched are linked to the Master data record. Submission records that are no matches have new unique identifiers created.

Security

All users must have a registered and active account to log into UniqID. An authorized user must create the account and the user must complete the account setup process before the user can log in. UniqID utilizes an email address to uniquely identify a user.

UniqID employs feature level restrictions and data level restrictions which may alter the experience in the application for the user. Feature Authorization and Data Authorization are controlled by a System Administrator.

External Authentication

All users are authenticated to a State security model. UniqID will integrate with existing security models for single sign-on implementation or other methods to access the solution based on Lightweight Directory Access Protocol (LDAP), Active Directory (AD), OAuth, or other standards-based security solution to store user information, credentials, roles, and group associations.

Feature Authorization

Each user is assigned to a role or multiple roles by a System Administrator. These roles are granted permissions to specific features and privileges. The application includes over fifteen roles, allowing administrators to control access to features.

Data Authorization

All users are assigned to a location or locations and can only upload / edit for those locations. The application enables System Administrators to grant access to data by location. A user is restricted to only uploading and editing people that are assigned to the same locations. For example, a user assigned to District A cannot upload data on persons for District B.



If a feature is described in this document, but not visible in the application to you, your role assignment may not include the permissions to that feature.

System Requirements

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

Getting Started

- Chapter Highlights [Overview](#) [Logging In](#) [Resetting a Password](#) [User Interface Overview](#)
- [Main Header \(Main Navigation\)](#) [Side Navigation](#) [Main Content Area](#) [Lesson: How to Sort Data](#)
- [Lesson: How to View Records Using Pagination](#)
- [Lesson: How to Filter Data](#)

Overview

This User Guide can be used by UniqID users to better understand how the application works. The guide includes an overview of each feature, screenshots, and lessons for specific actions.

The guide includes this Getting Started chapter and is then split into a chapter per core feature. Each chapter will include a “Chapter Highlights” with bookmarks/links to the sub-sections within the chapter.

The guide will also include alerts/messages, including:



This indicator is used to highlight an important fact or detail about a feature or process.



This indicator is used to describe/define a specific term or reference that is used.

Logging In

To log into UniqID, a System Administrator must create an account. When the account is created by the System Administrator, an email is sent to the user prompting the completion of the account setup process, including adding a password. Once the account setup process has been completed, the user can log into the application.

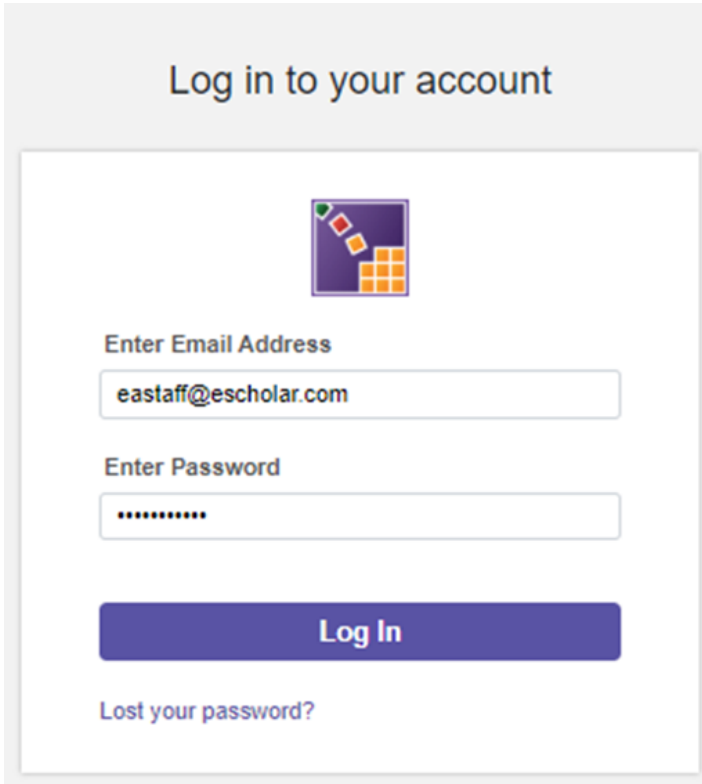
The account setup email will include the URL, or the URL can be given to the user by the System Administrator. When the UniqID URL is accessed, the application will display a Log In screen as shown below.

UniqID has specific rules for a password to ensure the security of the account. The password must meet the following rules:

- At least 1 lowercase letter.
- At least 1 uppercase letter.
- At least 1 number.
- At least 1 special character (!@#\$%^&).
- Must be 5 to 15 characters.
- Must not contain your username (email address).

Lesson: How to Log In

1. Access the URL: <https://secureid.la.gov/uid/login>
2. Enter the email address. The email address is the username.
3. Enter the password.



Log in to your account



Enter Email Address

eastaff@escholar.com

Enter Password

Log In

[Lost your password?](#)

4. Click the Log In button.
5. The application will authenticate the email and password entered on the form. If the user is authorized to access the application, the UniqID Dashboard will be displayed for the authenticated user.
 - a. If the email or password is invalid or the user does not otherwise authenticate, an error will be returned on the Log In page.

Resetting a Password

If a user loses their password or cannot remember it, the user can reset their password by clicking the “Lost your password?” link on the Log In page.

Lesson: How to Reset a Password

1. Access the URL: <https://secureid.la.gov/uid/login>
2. Click the Lost your password? link on the Log In page.

Log in to your account



Enter Email Address

Enter Password

☐ Remember Me

Log In

[Lost your password?](#)

3. The application will display the Lost Password page which includes instructions for resetting the password.

Lost Password

Follow these steps to reset your account.

1. Enter your email address
2. Check your email and click on the password reset link
3. Follow the instructions and reset your password

Enter Email Address

Send Reset Link

[< Back to Log In](#)

4. Enter your email address.
5. Click the Send Reset Link button.

6. When the Send Reset Link button is clicked by the user, the application will email a password reset link to the email address supplied in the form.
7. Follow the instructions in the email to complete the process.
 - a. If you do not receive the email, please be sure to check your Junk Mail.

User Interface Overview

The user interface is responsive and can be viewed on a web browser, mobile device, or tablet by an authorized user. The information below describes the user interface components to help users to understand how to navigate the application.

The user interface is divided into the following categories: Main Header, Side Navigation, Main Content Area, and Footer.



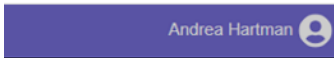
All screenshots shown in this document contain fake data. No real person data is displayed in any of the screenshots.

Main Header (Main Navigation)

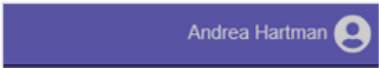
The Main Header of the application includes the application name, an application picker, user information, breadcrumb section, and page actions.

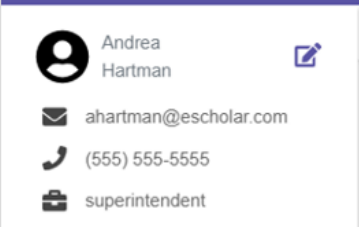
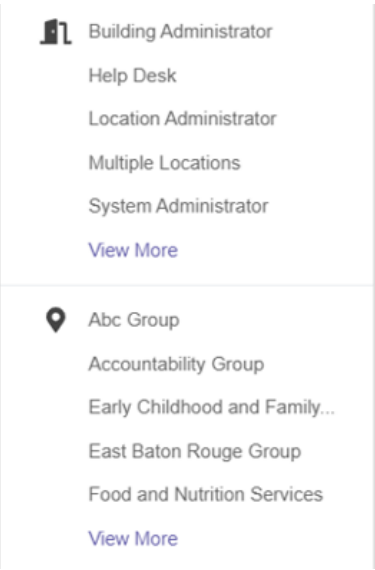
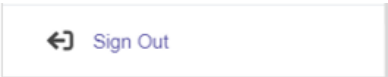


User Information



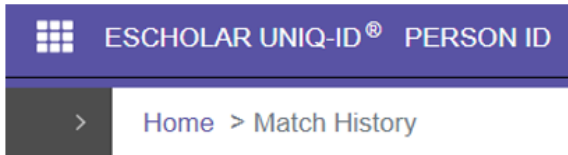
Click the person image in the top right to get to the User Information section. The User Information section includes the email address, phone number, roles, and groups for the user and a Sign-Out link. If authorized, the user can click the Edit Icon () to update user profile details.

Icon/Image(s)	DESCRIPTION
	Lists the full name of the user.

 The user profile card for Andrea Hartman displays her name, email address (ahartman@escholar.com), phone number ((555) 555-5555), and title (superintendent). An edit icon is visible in the top right corner.	Displays user first and last name, email address, and phone number (if available). The Edit icon () will be available for users who can edit User Profiles.
 The Roles and Groups section lists the user's roles and groups. Roles include Building Administrator, Help Desk, Location Administrator, Multiple Locations, System Administrator, and a View More link. Groups include Abc Group, Accountability Group, Early Childhood and Family..., East Baton Rouge Group, Food and Nutrition Services, and another View More link.	Displays the user's Roles and Groups.
 A Sign Out button with a back arrow icon.	Includes a Sign-Out button.

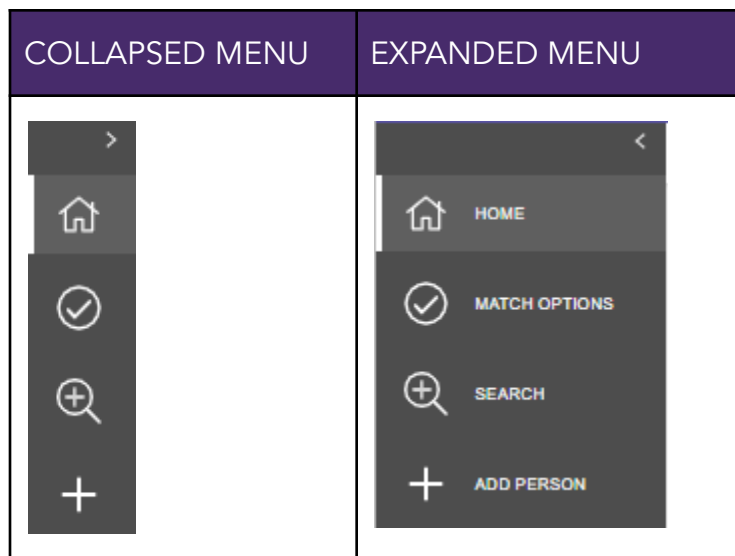
Breadcrumbs (Navigation Path)

The breadcrumbs provide the path/location of where the user is in the application and offers clickable links to return to previous pages.



Side Navigation

The Side Navigation menu provides easy access to all the core functions within the application. The menu can be expanded or collapsed using the > icon. Each navigation option is described in more detail below.



Menu Options

Depending on feature authorization, the following menu options will be available. If an icon is not available, the permissions to the feature are not available to the user role.

ICON(S)	FEATURE	DESCRIPTION
	Home/Dashboard	Refers to the "Home/Dashboard" section.
	Match Options	Refers to "Match Options" section.
	Search	Refers to the "Search Options" section.
	Add Person	Refers to the "Add Person" section.
	Reports	The reports icon will appear on the menu if the user is authorized to view reports. Clicking on the report menu will take the user to the authorized reports available for the user's role.
	Sign Out	The Sign Out icon is at the bottom of the left-hand navigation. When the Sign Out icon is clicked, the application will log the user out of their session and return to a Log In page.

Main Content Area

The Main Content Area of the application displays the specific data, functions and options that are available for the selected component/navigation item. This may include panels, data grids, charts, and actions.

Actions/Icons

The action icons facilitate user navigation and operations within the application.

ICON(S)	NAME	NAVIGATES TO
---------	------	--------------

	Drill In	Navigates to the next level detail screen.
	Drill Back	Navigates back to the previous screen.
	Ellipse	Multiple Actions: When there are 2 or more actions available, this icon may be used. When clicked, it will display a menu which includes all the available actions. The actions within the menu should be clicked to initiate the action.
	Edit	Allows for editing details.
	Delete or Remove	Remove a location from a group or delete a user from the system.
	Next	View the next panel or screen.
	Previous	View the previous panel or screen.
	View Details	Show more details.
	Hide Details	Show fewer details.
	Start Downloads	Begin downloading the report.
	Refresh	Refreshes the data grid, list, or panel with the most updated information.
	Sort	Sorts the column in the list/grid. Clicking 1-time sorts ascending order

		and clicking 2 times sorts in descending order.
	Alert	Indicates an alert/message for the user.

Footer

The Footer of the application displays the application version and eScholar copyright information.

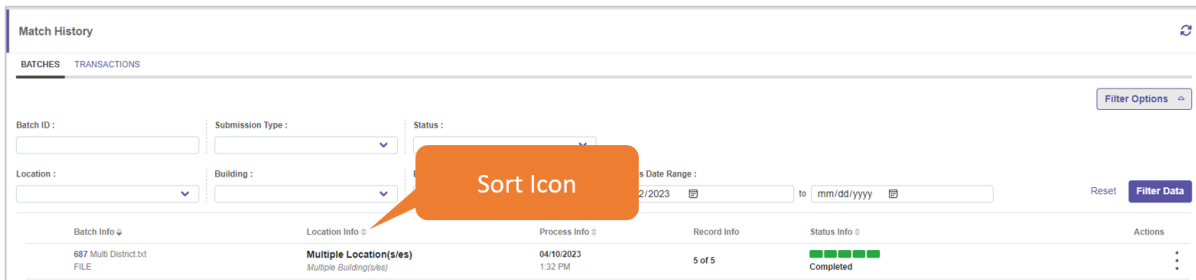
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Lesson: How to Sort Data

1. Click on the Sort icon () to the right of the column name to be filtered.

Location Info 

2. The application will sort the data grid.



Match History

BATCHES TRANSACTIONS

Filter Options

Batch ID: Submission Type: Status: Date Range: to mm/dd/yyyy

Location: Building: Reset Filter Data

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
687 Multi District.btl FILE	Multiple Location(s/es) Multiple Building(s/es)	04/10/2023 1:32 PM	5 of 5	Completed	

3. To reverse the sort, click the Sort icon () to the right of the column name again.

Lesson: How to View Records Using Pagination

1. If there are more than 25 records available in the data grid, the application will include a pagination function at the bottom of the data grid.
2. To paginate, click the numbered buttons, Next or Previous buttons.

1 - 25 of 38

Previous 1 2 Next

Lesson: How to Filter Data

1. Drill in from the Recent Activity Panel to the Match History Panel.

Recent Activity (Past 30 Days) Drill into Match History Panel

BATCHES		TRANSACTIONS				
Pending - 5 Most Recent View Past 7 Days View All >>						
Batch Info	Location Info	Process Info	Record Info	Status Info	Actions	
925 UID_S.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	Pending: Request Queued	Refresh	
922 UID_922.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	Pending: In Progress	Refresh	
921 UID_921.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 2 PENDING	Pending: In Progress	Refresh	
920 UID_920.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	Pending: Near Matches	Resolve	
918 AFP	Multiple Districts Multiple Schools	04/02/2020 3:00 PM	1000 of 190,002 PENDING	Pending: Near Matches	Resolve	
Completed - 5 Most Recent View Past 7 Days View All >>						
Batch Info	Location Info	Process Info	Record Info	Status Info	Actions	
1003 Search	Acadia Parish (027) Brownfields Elementary School (027018)	07/27/2022 3:00 PM	1 of 1	Completed		

2. Select the submission type, status, location, building enrollment year or process date range. Click Filter Data.

Match History

BATCHES		TRANSACTIONS				
Batch ID :	Submission Type :	Status :	Filters			
	FILE	Near Matches	Filter Options			
Location :	Building :	Enrollment Year(School Year) :	Process Date Range :			
		2023	03/12/2023 to mm/dd/yyyy	Reset Filter Data		
Batch Info	Location Info	Process Info	Record Info	Status Info	Actions	
47 Child upid file1-High ... FILE	Multiple Location(s/es) Multiple Building(s/es)	03/22/2023 1:56 PM	1 of 3 PENDING	Pending: Near Match TESTING(s/es)	Resolve	
343 Advanced-Test2.txt FILE	Multiple Location(s/es) Multiple Building(s/es)	03/31/2023 9:35 AM	1 of 3 PENDING	Pending: Near Match TESTING(s/es)	Resolve	
344 Advanced-Test2.txt FILE	Multiple Location(s/es) Multiple Building(s/es)	03/31/2023 10:12 AM	1 of 3 PENDING	Pending: Near Match TESTING(s/es)	Resolve	
652 Advanced-Test2.txt FILE	Multiple Location(s/es) Multiple Building(s/es)	04/06/2023 4:37 PM	3 of 3 PENDING	Pending: Near Match TESTING(s/es)	Resolve	

3. The data will filter based on the filter selections.

Home/Dashboard

Chapter Highlights

- [Overview](#)
- [Recent Activity Panel](#)
- [Batches Tab](#)
- [Transactions Tab](#)
- [Lesson: How to Refresh Recent Activity Data](#)
- [Lesson: How to Drill into Match History](#)
- [Lesson: How to Drill into Near Match List Page](#)
- [Lesson: How to Drill into the Batch Profile](#)
- [Lesson: How to Download Batch Results from a Batch Profile](#)
- [Lesson: How to Drill into the Transaction Profile](#)
- [Lesson: How to Download a Transaction from the Transaction Profile](#)
- [Lesson: How to Drill into the Location Profile](#)

Information that is presented will be dependent on the individual user's data authentication and feature authentication.

Overview

The Dashboard is the landing page for the application and provides users with quick access to the Transactions/Batches. Once a user successfully logs into the application, the Dashboard/Home Page will be displayed depending on their user role. If a feature is not visible, then the permission to that feature may not be enabled.

The main goal of this page is to enable quick access to recently processed Transactions or Batches and for next steps. From the Dashboard, users can easily access the next steps, such as resolving near matches, downloading data, viewing Transaction information, or reviewing statuses.

The screenshot below displays the Dashboard including the Summary Panel, Recent Activity Panel, Quick Tips Panel, and the actions that are available from this page. Please read each section below for more details.

ESCHOLAR UNIQ-ID® PERSON ID Andrea Hartman

Home

System Message

Please remember to submit your person records by 08/02/2023. If you have Near Matches, please be sure to resolve them no later than 08/25/2023 as the person records ...

[View More](#)

Pending Work

Pending Near Matches	44
Pending Batches	4

Quick Actions

- + Add a Person
- 📄 Upload a File
- 🔍 Perform a Search

Recent Activity (Past 30 Days)

[BATCHES](#) [TRANSACTIONS](#)

Pending - 5 Most Recent [View Past 7 Days](#) | [View All](#) »

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
925 UID_S.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	 Pending: Request Queued	Refresh
922 UID_922.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	 Pending: In Progress	Refresh
921 UID_921.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 2 PENDING	 Pending: In Progress	Refresh
920 UID_920.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	 Pending: Near Matches	Resolve
918 AFP	Multiple Districts Multiple Schools	04/02/2020 3:00 PM	1000 of 190,002 PENDING	 Pending: Near Matches	Resolve

System Message Panel

System Message from the System Administrator is displayed if there is a message. If there is not a message, this panel will not be displayed. Click “View More” to see more of the message.

System Message

Please remember to submit your person records by 11/17/2022. If you have Near Matches, please be sure to resolve them no later than 12/10/2022 as the person records ...

[View More](#)

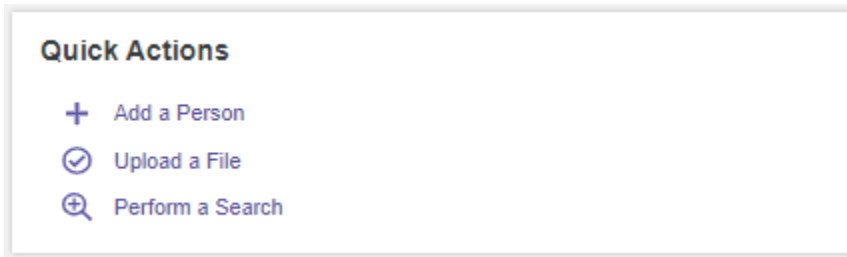
Pending Work Panel

The Pending Work Panel shows pending near matches and pending batches that the user has access to based on Location.

Pending Work	
Pending Near Matches	44
Pending Batches	4

Quick Actions Panel

The Quick Actions panel contains the same navigation options as the left-hand panel.



Recent Activity Panel

Recent Activity displayed on the Dashboard includes a Refresh Action Button, Drill into Action Button, Transaction Tab, and a Batch Tab. The Panel and Grid Action Buttons enable the user to perform specific actions related to the Recent Activity Panel as described below. The Transaction Tab displays all the individual records that were processed by the application, while the Batch Tab lists all the Batches that were processed by the application. A Batch is a group of Transactions that were requested at one time via a File Upload or a Person ID Match Options submission.

Panel Action Buttons/Links



ICON	ACTION	DESCRIPTION
	Refresh	When clicked, the Refresh button icon will refresh the Recent Activity Panel with the latest Transactions/Batches and Statuses.
	Drill In	When clicked, the Drill In button icon will navigate to the Match History page. Refer to the Match History page for more information.

Batches Tab

The Batches Tab includes all the Batches that the user is authorized to access. The Recent Activity Panel is grouped into two sub-sections: Pending – 5 Most Recent and Completed – 5 Most Recent. The Pending section will list any Batch that is not in the “Completed” status, while the Completed section will include all Batches that are in the “Completed” status.

Recent Activity (Past 30 Days)

BATCHES

TRANSACTIONS

Pending - 5 Most Recent

View Past 7 Days

View All »

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
925 UID_S.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	Pending: Request Queued	Refresh
922 UID_922.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	Pending: In Progress	Refresh
921 UID_921.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 2 PENDING	Pending: In Progress	Refresh
920 UID_920.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	Pending: Near Matches	Resolve
918 AFP	Multiple Districts Multiple Schools	04/02/2020 3:00 PM	1000 of 190,002 PENDING	Pending: Near Matches	Resolve

Completed - 5 Most Recent

View Past 7 Days

View All »

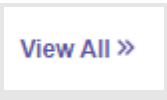
Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
1003 Search	Acadia Parish (027) Brownfields Elementary School (027018)	07/27/2022 3:00 PM	1 of 1	Completed	
1002 AFP	East Baton Rouge Parish (017) Multiple Schools	04/06/2020 3:00 PM	1,000 of 1,000	Completed	
1001 AFP	Acadia Parish (027) Multiple Schools	04/06/2020 3:00 PM	2,000 of 2,000	Completed	



REFRESHER: A Batch is created in the application when a user submits a record for assignment, including Upload File, Add a Person, AFP, SIF, and via APIs. Each Batch created by the application is assigned a Batch ID to uniquely identify the submission.

The table below describes each of the fields/columns available in the Batch Tab view:

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
Alert	Icon 	If a Batch is in a Pending state, the yellow exclamation icon will be displayed to alert the user of the Pending status.
Batch Info	Batch ID File Name Submission Type	Includes the Batch Reference ID number, File Name, and the Submission Type for the Record. The Submission Type can be File, Web Services, SIF, AFP or Individual Match. The Batch ID will be a hyperlink to the Batch Info page.
Location Info	LEA Name (Code) School Name (Code)	Includes the name and code for the LEA and School associated with the Batch. The names are hyperlinks to the Location Profile.

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
Process Info	Submission Date Submission Time	Includes the date and time the Batch was submitted to the application.
Record Info	Count of records in the current Batch Status Count of total records in the Batch Status	Includes counts to help determine progress of the Batch. The Status will indicate the current Status of the Batch.
Status Info	Progress Bar Status	Includes a 5-section status bar which visualizes the Status of the Batch and the text of the Status.
Actions		• Dropdown Menu: Click to view more actions. ○ Continue ○ Refresh ○ Resolve ○ View ○ Download ○ View Batch Details
	View Past 7 Days	When clicked, the “View Past 7 Days” link will navigate to the Match History page with a view of the past 7 days. Refer to the Match History page for more information.
	View All	When clicked, the “View All” link will navigate to the Match History page with a view of all Batches (Pending or Completed). Refer to

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
		the Match History page for more information.

Transactions Tab

The Transaction Tab includes all individual Transactions that the user is authorized to access. The Recent Activity Panel is grouped into two sub-sections: Pending – 5 Most Recent and Completed – 5 Most Recent. The Pending section will list any Transaction that is not in the “Completed” status, while the Completed section will include all Transactions that are in the “Completed” status.

Recent Activity (Past 30 Days)

BATCHES

TRANSACTIONS

Pending - 5 Most Recent

View Past 7 DaysView All »

Transaction Info	Location Info	Process Info	Batch ID	Status Info	Actions
12319 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	922	Pending: In Progress	Refresh
12316 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	921	Pending: In Progress	Refresh
12314 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	920	Pending: Near Matches	Resolve
12313 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	920	Pending: Near Matches	Resolve
12311 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/02/2020 3:00 PM	918	Pending: Near Matches	Resolve

Completed - 5 Most Recent

View Past 7 DaysView All »

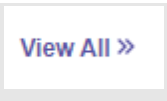
Transaction Info	Location Info	Process Info	Batch ID	Status Info	Actions
12334 Search	Acadia Parish (027) Brownfields Elementary School (027018)	07/27/2022 3:00 PM	1003	Completed	
12333 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	1002	Completed	
12332 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	1002	Completed	



REFRESHER: A Transaction is created for each record that is processed by the application. A Transaction is created when records are submitted to the assignment process, including Upload File, Add a Person, AFP, SIF and via APIs.

The table below describes each of the fields/columns available in the Transaction Tab view:

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
Alert	Icon 	If a Transaction is in a Pending state, the yellow exclamation icon will be displayed to alert the user of the Pending status.
Transaction Info	Transaction ID Submission Type	Includes the Transaction Reference ID number and the Submission Type for the Record. The Submission Type can be File, Web Services, SIF, AFP or Individual Match. The Transaction ID will be a hyperlink to the Transaction Info page.
Location Info	LEA Name (Code) School Name (Code)	Includes the name and code for the LEA and School associated to the Transaction. The names are hyperlinks to the Location Profile.
Process Info	Submission Date Submission Time	Includes the date and time the Transaction was submitted to the application.
Batch ID	Batch ID	If the Transaction is associated to a Batch, the Batch ID will be listed and will be a hyperlink to the Batch Info page.
Status Info	Progress Bar Status	Includes a 5-section status bar which visualizes the Status of the Transaction and the text of the Status.

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
Actions		• Dropdown Menu: Click to view more actions. - o Continue - o Refresh - o Resolve - o View - o Download - o View Transaction Details
	View Past 7 Days	When clicked, the “View Past 7 Days” link will navigate to the Match History page with a view of the past 7 days. Refer to the Match History page for more information.
	View All	When clicked, the “View All” link will navigate to the Match History page with a view of all Transactions (Pending or Completed). Refer to the Match History page for more information.

Next Action Buttons/Links

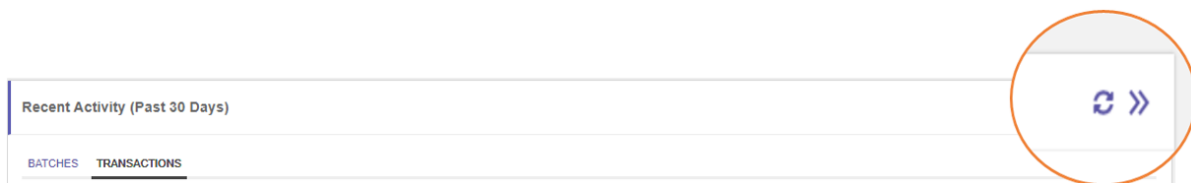
Each Transaction/Batch will also include an Actions column which will direct the user to the next steps within the application. If the Transaction/Batch is in the Pending section, a next action link will be available. This next action will navigate the user to the appropriate action for that Transaction/Batch.

ACTION	DESCRIPTION
Continue	Enables the user to continue a Transaction/Batch that is in a pause status.
Download	Enables the user to access the Transaction/Batch Info page that provides download capabilities.

Refresh	Enables the user to refresh the status of the Transaction/Batch.
Resolve	Enables the user to resolve the pending near matches for the Transaction/Batch.
View	Enables the user to view the Transaction/Batch Information Profile.

Lesson: How to Refresh Recent Activity Data

- On the Dashboard, find the Recent Activity panel.
 - To access the Dashboard, click the Dashboard/Home Icon () if it is not already selected.
- Click on Refresh Icon () on the Recent Activity panel header.



- The Recent Activity panel will update the status information for the pending Transactions or Batches.
 - When the refresh is completed, some Transactions or Batches may transition to the Completed stage and will be displayed in the Completed section.

Lesson: How to Drill into Match History

- On the Dashboard, find the Recent Activity panel.
- Click on icon or links below to navigate to Match History.
 - Drill in Icon on Recent Activity panel header. The system will display the complete history of batches from the past 30 days.

Recent Activity (Past 30 Days) 

BATCHES TRANSACTIONS

Pending - 5 Most Recent View Past 7 Days View All >>

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
 925 UID_S.txt File	Acadia Parish (027) <i>Brownfields Elementary School (027018)</i>	04/06/2020 3:00 PM	2 of 2 PENDING	 Pending: Request Queued	Refresh 
 922 UID_922.txt File	Acadia Parish (027) <i>Brownfields Elementary School (027018)</i>	04/05/2020 3:00 PM	1 of 3 PENDING	 Pending: In Progress	Refresh 

- b. Click on “View Past 7 Days” Pending/Completed. The system will display the complete history of batches from the past seven days.

Recent Activity (Past 30 Days) 

BATCHES TRANSACTIONS

Pending - 5 Most Recent View Past 7 Days View All >>

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
 925 UID_S.txt File	Acadia Parish (027) <i>Brownfields Elementary School (027018)</i>	04/06/2020 3:00 PM	2 of 2 PENDING	 Pending: Request Queued	Refresh 
 922 UID_922.txt File	Acadia Parish (027) <i>Brownfields Elementary School (027018)</i>	04/05/2020 3:00 PM	1 of 3 PENDING	 Pending: In Progress	Refresh 

- c. Click on “View All >>” Pending/Completed. The system will display the complete history of batches from the past 30 days.

Recent Activity (Past 30 Days)					
BATCHES TRANSACTIONS					
Pending - 5 Most Recent				View Past 7 Days	View All >>
Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
925 UID_S.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	Pending: Request Queued	Refresh
922 UID_922.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	Pending: In Progress	Refresh

3. The application will display the Match History page with filters applied as appropriate and in the same context as the previous page. Authorization rules will also be applied.

Match History					
BATCHES TRANSACTIONS					
Batch ID : Submission Type : Status : District : School : Enrollment Year(School Year) : Process Date Range : Filter Options Multiple 2020 03/07/2020 X to Reset Filter Data					
Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
925 UID_S.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	Pending: Queued	Refresh
922 UID_922.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	Pending: In Progress	Refresh
921 UID_921.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 2 PENDING	Pending: In Progress	Refresh
920 UID_920.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	Pending: Near Matches	Resolve

- Navigate via Drill in icon, the application will default to the current year for the School Year filter and will also default to the past 30 days in the Process Date Range filter.
- Navigate via "View Past 7 Days" link, the application will default to the current year for the School Year filter and will also default to the past 7 days in the Process Date Range filter and Status filter with Pending statuses or Completed statuses depending on where they came from.
- Navigate via "View All >>" link, the application will default to the current year for the School Year filter and will also default to the past 30 days in the Process Date Range filter and Status filter with Pending statuses or Completed statuses depending on where they came from.
- If a Batch or Transaction was not selected by the user on the prior page, the application may display a message indicating the user must enter a Batch ID or Transaction ID. If so, enter a valid Batch ID or Transaction ID and click the Filter Data button.



Batch ID or Transaction ID must be entered to view results.

Lesson: How to Drill into the Near Match List Page

1. On the Dashboard, find the Recent Activity panel and click on the “Resolve” action link or click on the Ellipse or Multiple Actions icon () to initiate the Action Menu.
2. Click Resolve.

	921 UID_921.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 2 PENDING	 Pending: In Progress	Refresh 
	920 UID_920.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	 Pending: Near Matches	Resolve 
	918 AFP	Multiple Districts Multiple Schools	04/02/2020 3:00 PM	1000 of 190,002 PENDING	 Pending: Near Matches	Resolve Download View Batch Details

3. The application will display the Near Match List page which includes a filter and a list of all the Near Matches applicable to the prior selection.
4. View the Near Match List page.

Home > Pending Near Match


NEAR MATCHES FOUND:

The system found Near Matches which should be reviewed and resolved by a user.
 Next Steps: Review Near Matches below

1 Near Matches

Filter Options

Transaction ID :
 Batch ID :
 Submission Type :
 Last Name :
 Identifier :
 Identifier Type :
 District :
 School :
 School Year :
 Process Date Range : to
 Sort By :
 Reset

Pending Near Matches

Submission Record Oliver Jones Acadia Parish (027) Brownfields Elementary School (027018)	Date of Birth: 09/23/2001 Grade: Undergraduate Local ID: 12345	Race: White Gender: Male Social Security Number: 098-12-1133	 Max Match Score: 94%	4 Potential Matches	
---	---	---	---	----------------------------	---

1 - 1 of 1

Previous 1 Next

5. Jump to [Lesson: How to Resolve Near Matches](#).

Lesson: How to Drill into the Batch Profile

1. On the Dashboard, find the Recent Activity panel.
2. Click on the Batches Tab.

Recent Activity (Past 30 Days) ↻ >>

Batches Tab

BATCHES TRANSACTIONS

Pending - 5 Most Recent View Past 7 Days | View All >>

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
925 UID_S.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	 Pending: Request Queued	Refresh ⋮
922 UID_922.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	 Pending: In Progress	Refresh ⋮
921 UID_921.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 2 PENDING	 Pending: In Progress	Refresh ⋮
920 UID_920.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	 Pending: Near Matches	Resolve ⋮
918 AFP	Multiple Districts Multiple Schools	04/02/2020 3:00 PM	1000 of 190,002 PENDING	 Pending: Near Matches	Resolve ⋮

Completed - 5 Most Recent View Past 7 Days | View All >>

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
1003 Search	Acadia Parish (027) Brownfields Elementary School (027018)	07/27/2022 3:00 PM	1 of 1	 Completed	⋮

- Click on the Batch ID in the Batch Info column or click on View Batch Details in the multiple action icon menu.

Recent Activity (Past 30 Days) ↻ >>

BATCHES TRANSACTIONS

Pending - 5 Most Recent View Past 7 Days | View All >>

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
925 UID_S.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	 Pending: Request Queued	Refresh ⋮
922 UID_922.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	 Pending: In Progress	Refresh ⋮
921 UID_921.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 2 PENDING	 Pending: In Progress	Refresh ⋮
920 UID_920.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	 Pending: Near Matches	Resolve ⋮
918 AFP	Multiple Districts Multiple Schools	04/02/2020 3:00 PM	1000 of 190,002 PENDING	 Pending: Near Matches	Resolve ⋮

- The application will display the selected Batch Profile.
- From this view, the user may have the option to view Process and General Details or to perform next actions such as Download or View Batch Information.

Batch Profile

Contains one or many records.

Batch Header

921

Batch ID

File (UID_921.txt)

Submission Type

04/05/2020 3:00 PM

Process Info

Pending: In Progress

Status

DETAILS

DOWNLOAD

Process Details

Displays details about processing.

Processing Information

Status Statistics

Match Status	Record Count
Ready to Assign IDs	
Pending: Assignment In Progress	10

Processing Stage

Stage	Processing Date
Upload Completed	03/03/2020 12:04:33 PM
Validation Started	03/03/2020 12:04:53 PM
Validation Completed	03/03/2020 12:05:33 PM
Assignment Started	03/03/2020 12:07:33 PM

Next Steps

Actions

Refresh

Download

View Transactions

General Information

General Information

District

Acadia Parish (027)

School

Brownfields Elementary School (027018)

Extract Date

N/A

Lesson: How to Download Batch Results from a Batch Profile

1. On the Dashboard, click on the Batch tab on the Recent Activity panel.
2. Click on the Batch Info number under Batch Info column or click the Download or View Batch Details link in the multiple select action icon menu.

Recent Activity (Past 30 Days)

BATCHES TRANSACTIONS

Pending - 5 Most Recent

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
925 UID_S.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	Pending: Request Queued	Refresh
921 UID_921.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	Pending: In Progress	Refresh
920 UID_920.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 2 PENDING	Pending: In Progress	Refresh
920 UID_920.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	Pending: Near Matches	Resolve
920 UID_920.txt File	Multiple Districts Multiple Schools	04/02/2020 3:00 PM			Download View Batch Details

Completed - 5 Most Recent

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
1003 Search	Acadia Parish (027) Brownfields Elementary School (027018)	07/27/2022 3:00 PM	1 of 1	Completed	

3. The application will display the selected Batch Profile. Click Download.

Batch Profile
Contains one or many records.

921 Batch ID File (UID_921.txt) Submission Type 04/05/2020 3:00 PM Process Info Pending: In Progress Status

DETAILS DOWNLOAD

Process Details
Displays details about processing.

Status Statistics

Match Status	Record Count
Ready to Assign IDs	4
Pending: Assignment In Progress	

Processing Stage

Stage	Processing Date
Upload Completed	03/03/2020 12:04:33 PM

Next Steps

Refresh
Download
View Transactions

General Information

District Acadia Parish (027)

4. Click Generate Extract.

Batch Profile

Contains one or many records.

920

Batch ID

File

Sub

DETAILS

DOWNLOAD

Download Options

Match Status

Status	Submission Date	Downloadable Record Count	Total Record Count
☒ Near Match	04/23/2020 13:48	2	2
☐ Near Match Details	04/23/2020 13:48	2	2

Format

Download Options

Simple

Advanced

Click Generate Extract

Generate Extract

5. Click Download under Actions.

Extract File (1)					
Extract Date	Location Info *	Record Count	Extract Name	Extract Status	Actions
04/06/2020 3:00 PM	Acadia Parish (027) Brownfields Elementary School (027018)	2 of 2	pid_UID_920_920_04232020_131402_uid_perm.txt	Completed	Download

Lesson: How to Drill into the Transaction Profile

- On the Dashboard, click on the Transactions tab, then find the Recent Activity panel.
- Click on the Transaction under Transaction Info column or click the View Transaction Details link in the multiple select action icon menu.

Recent Activity (Past 30 Days) 🔄 >>

BATCHES **TRANSACTIONS**

View Past 7 Days | View All >>

	Location Info	Process Info	Batch ID	Status Info	Actions
12325 UID_923.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	923	 Pending: In Progress	Refresh ⋮
12324 UID_923.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	921	 Pending: In Progress	Refresh ⋮
12314 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	920	 Pending: Near Matches	Resolve ⋮
12313 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	920	 Pending: Near Matches	Resolve ⋮

- From the Transaction Profile panel, the user may have the option to view Process and General Details or to perform next actions such as Download or View Batch Information.

Transaction Profile
Contains one record.

Transaction Header

12325 Transaction ID	File Submission Type	04/06/2020 3:00 PM Process Info	923 Related Batch	 Completed Status
--------------------------------	--------------------------------	---	-----------------------------	--

Tabs

PERSON **DETAILS** **DOWNLOAD**

Process Details
Displays details about processing.

Processing Information

Status Statistics

Match Status	Record Count
ID Assignment Complete (Completed)	1
Completed: Assignment Exact Match Match Assign ID (History Created)	

Processing Stage

Stage	Processing Date
Upload Completed	03/03/2020 12:04:33 PM
Validation Started	03/03/2020 12:04:53 PM
Validation Completed	03/03/2020 12:05:33 PM

Next Steps

Actions

Download

[View Batch Profile](#)

General Information

District	Acadia Parish (027)
School	Brownfields Elementary School (027018)
Extract Date	N/A

Lesson: How to Download a Transaction from the Transaction Profile

- On the Dashboard, find the Recent Activity panel.

- Click on the Transaction under Transaction Info column. The Download link can also be clicked from the multiple action icon menu.

Recent Activity (Past 30 Days) 🔄 >>

BATCHES		TRANSACTIONS			
View Past 7 Days View All >>					
Transaction Info	Process Info	Batch ID	Status Info	Actions	
12325 UID_923.txt File	Acadia Parish (027) Brownfields Elementary School (027018) 04/05/2020 3:00 PM	923	Pending: In Progress	Refresh ⋮	
12324 UID_923.txt File	Acadia Parish (027) Brownfields Elementary School (027018) 04/05/2020 3:00 PM	921	Pending: In Progress	Refresh ⋮	
12314 File	Acadia Parish (027) Brownfields Elementary School (027018) 04/03/2020 3:00 PM	920	Pending: Near Matches	Resolve ⋮	
12313 File	Acadia Parish (027) Brownfields Elementary School (027018) 04/03/2020 3:00 PM	920	Pending: Near Matches	Resolve ⋮	

- The application will display the selected Transaction Profile.
- From this view, click the Download Tab in the Transaction Profile Header or the Download button in the Next Steps panel.

Transaction Profile
Contains one record.

12325 Transaction ID	File Submission Type	04/06/2020 3:00 PM Process Info	923 Related Batch	Completed Status
--------------------------------	--------------------------------	---	-----------------------------	----------------------------

PERSON DETAILS **DOWNLOAD**

Process Details
Displays details about processing.

Status Statistics

Match Status	Record Count
ID Assignment Complete (Completed)	1
Completed: Assignment Exact Match Match Assign ID (History Created)	

Processing Stage

Stage	Processing Date
Upload Completed	03/03/2020 12:04:33 PM
Validation Started	03/03/2020 12:04:53 PM
Validation Completed	03/03/2020 12:05:33 PM

Next Steps

Download

View Details

General Information

District	Acadia Parish (027)
School	Brownfields Elementary School (027018)
Extract Date	N/A

- The application will display the Download Tab page which includes the Download Options form and a Download History panel.
- To extract/download the data, select the Match Status and Format options.

Transaction Profile
Contains one record.

12325
Transaction ID

File
Submission Type

04/06/2020 3:00 PM
Process Info

923
Related Batch

Completed

Status

PERSONDETAILSDOWNLOAD

Download Options

Match Status

Status	Submission Date	Downloadable Record Count	Total Record Count
➔ ☒ IDs Assigned (Match / No Match)	04/23/2020 13:48	1	1

Format

➔

Download Options

Simple

Advanced

➔

Generate Extract

Download History
Displays download history.

User ID	Download Date
supr@school1.edu	05/03/2020 11:57:20 AM
RobertJohnson@school2.edu	04/20/2020 11:46:02 AM
swilton@school2.edu	04/19/2020 09:10:00 AM
RobertJohnson@school2.edu	04/18/2020 01:34:11 PM

- Click the Generate Extract button.
- The application will start the download using the web browser default download process.

Lesson: How to Drill into the Location Profile

1. On the Dashboard, locate the Recent Activity panel and click on the District/School link under Location Info column.

Recent Activity (Past 30 Days) ↻ »

BATCHES **TRANSACTIONS**

Pending - 5 Most Recent View Past 7 Days View All »

Transaction Info	Location Info	Process Info	Batch ID	Status Info	Actions
12325 File	Acadia Parish (027) <i>Brownfields Elementary School</i>	04/05/2020 3:00 PM	923	 Pending: In Progress	Refresh ⋮
12316 File	Acadia Parish (027) <i>Brownfields Elementary School</i>	04/05/2020 3:00 PM	921	 Pending: In Progress	Refresh ⋮
12314 File	Acadia Parish (027) <i>Brownfields Elementary School</i>	04/03/2020 3:00 PM	920	 Pending: Near Matches	Resolve ⋮

2. From the Location Profile panel, the user can view General Location and Contact Details about the selected Location.

Acadia Parish
2402 N Parkerson Ave,
Crowley, LA 70526

ron.smith@acadiaparish.com
 (222) 456-3422

Active **8/25/2017** **N/A** **10,550**
Status Start Date End Date Records

Location Header

DETAILS **DOWNLOAD PERSON RECORDS**

General
View General Profile Information

Location Information

District Name	Acadia Parish
District Code	027
Address	2402 N Parkerson Ave,
City	Crowley
State	Louisiana
Zip	70526

General Information

Next Steps

[Download Person Records for this location](#)

Download Person Records for the Location

3. Click Download Person Records for this Location on the right side.

Match History

Chapter Highlights

- [OverviewFilterBatches Tab](#)
- [Transaction Tab](#)
- [Lesson: How to Filter the data](#)
- [Lesson: How to Refresh Match History Data](#)
- [Lesson: How to Access the Resolve Near Match Process](#)
- [Lesson: How to Drill into Transaction Profile](#)
- [Lesson: How to Drill into Batch Profile](#)
- [Lesson: How to Drill into Location Profile](#)

Overview

The Match History page enables users to view all Transactions or Batches that have been processed, refresh the page, filter, sort, and perform actions on the Transactions/Batches. Users can view the Transactions and Batches based upon the Data Authorization rules, such as the associated locations.

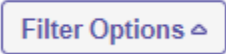
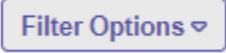
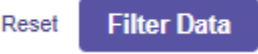
The screenshot shows the Match History page with the following components and annotations:

- Match History** header with a **Refresh** button and a circular arrow icon.
- Tabs**: **BATCHES** (selected) and **TRANSACTIONS**.
- Filter Options**: A section containing filters for Batch ID, Submission Type, Status (set to Multiple), District, School, Enrollment Year (set to 2020), and Process Date Range (03/07/2020 to). Includes **Reset** and **Filter Data** buttons.
- Table**:

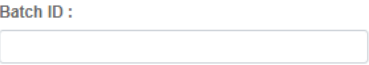
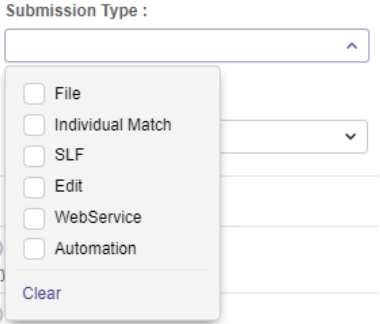
Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
925 UID_S.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	Pending: Queued	Refresh
922 UID_922.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	Pending: In Progress	Refresh
921 UID_921.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 2 PENDING	Pending: In Progress	Refresh
920 UID_920.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	Pending: Near Matches	Resolve
- Actions**: An annotation pointing to the **Resolve** button in the Actions column of the last row.

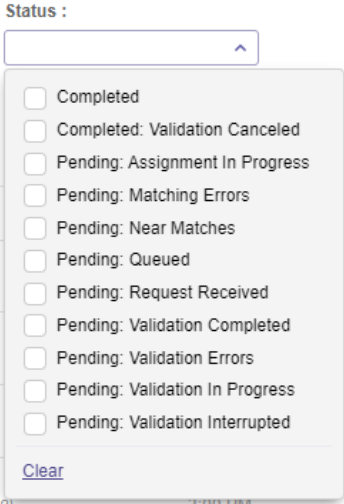
Filter

The Filter Option on the Match History page enables filtering of the Transactions data grid to help find a specific Transaction or group of Transactions. The Filter Options are described below:

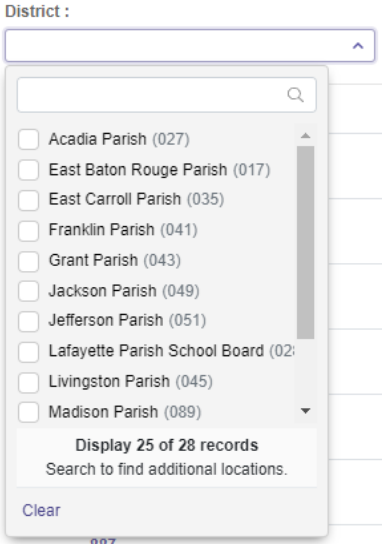
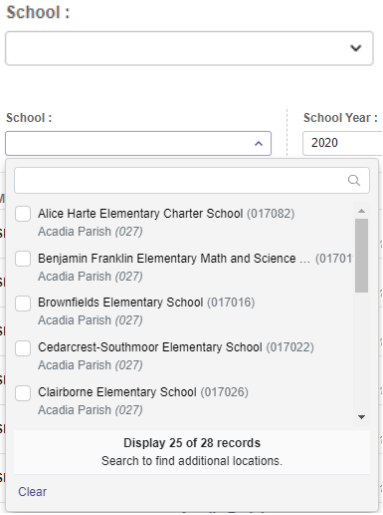
OPTION	DESCRIPTION
	When this button is displayed (arrow pointing up), the Filter Options are expanded. To collapse the Filter Options, click the Filter Options button.
	When this button is displayed (arrow pointing down), the Filter Options are collapsed. To expand the Filter Options, click the Filter Options button.
	When the Filter Options is expanded a Reset link and a Filter Data button will be displayed. To reset the filter criteria, click the Reset link. To filter the data grid based on the selected criteria, click the Filter Data button.

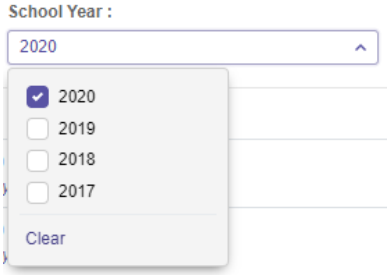
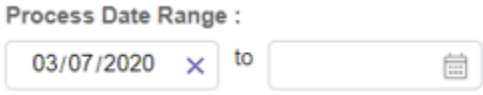
The following filter criteria is available in Filter Options:

FIELDS/DATA	EXAMPLE IMAGE	DESCRIPTION
Transaction ID		Each Transaction is assigned a unique Transaction identifier. This filter field will restrict the results to the specific Transaction ID entered in this field. To filter on a Transaction ID, enter the ID in the Transaction ID field.
Batch ID		Each Batch is assigned a unique Batch identifier. This filter field will restrict the results to the specific Batch ID entered in this field. To filter on a Batch ID, enter the ID in the Batch ID field.
Submission Type		The Submission Type filter will list all the Submission Type options available to the user. This may include: ▪ File ▪ Individual Match ▪ SLF

FIELDS/DATA	EXAMPLE IMAGE	DESCRIPTION
		▪ Edit ▪ Web Services ▪ Automation To filter on one or more of the options, click the selection box(es) to the left of the name. To clear all selected options, click the Clear link.
Status		The Status filter will list all the Status options. This may include: ▪ Completed: Validation Canceled ▪ Pending: Assignment In Progress ▪ Pending: Matching Errors ▪ Pending: Near Matches ▪ Pending: Queued

FIELDS/DATA	EXAMPLE IMAGE	DESCRIPTION
		▪ Pending: Request Received ▪ Pending: Validation Completed ▪ Pending: Validation Errors ▪ Pending: Validation in Progress ▪ Pending: Validation Interrupted To filter on one or more of the options, click the selection box(es) to the left of the name. To clear all selected options, click the Clear link.
District	District :	The District filter will list up to 25 Districts the user is authorized to view. This filter option also includes a search feature. To filter on one or more of the options, click the

FIELDS/DATA	EXAMPLE IMAGE	DESCRIPTION
		selection box(es) to the left of the name. To search for a specific district, enter at least 3 letters of the district name or code in the search field. To clear all selected options, click the Clear link.
School		The School filter will list up to 25 Schools the user is authorized to view. This filter option also includes a search feature. To filter on one or more of the options, click the selection box(es) to the left of the name. To search for a specific school, enter at least 3 letters of the school name or code in the search field. To clear all selected options, click the Clear link.

FIELDS/DATA	EXAMPLE IMAGE	DESCRIPTION
School Year		The School Year filter will list all the School Year options. Defaults to the current School Year. To filter on one or more of the options, click the selection box(es) to the left of the name. To clear all selected options, click the Clear link.
Process Data Range		The date range of when the batch process began.

When filter criteria are entered/selected and the Filter Data button is clicked by the user, the data displayed will be filtered by the system based upon the selections.

Batches Tab

The Batches Tab includes all the Batches that the user is authorized to access.

Recent Activity (Past 30 Days)					
BATCHES TRANSACTIONS					
Pending - 5 Most Recent View Past 7 Days View All »					
Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
 925 UID_S.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	 Pending: Request Queued	Refresh ⋮
 922 UID_922.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	 Pending: In Progress	Refresh ⋮
 921 UID_921.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 2 PENDING	 Pending: In Progress	Refresh ⋮
 920 UID_920.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	 Pending: Near Matches	Resolve ⋮
 918 AFP Multiple Districts	Multiple Districts Multiple Schools	04/02/2020 3:00 PM	1000 of 190,002 PENDING	 Pending: Near Matches	Resolve ⋮
Completed - 5 Most Recent View Past 7 Days View All »					
Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
1003 Search	Acadia Parish (027) Brownfields Elementary School (027018)	07/27/2022 3:00 PM	1 of 1	 Completed	⋮

The table below describes each of the fields/columns available in the Batch Tab view:

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
Alert	Icon 	If a Batch is in a Pending state, the yellow exclamation icon will be displayed to alert the user of the Pending status.
Batch Info	Batch ID File Name Submission Type	Includes the Batch Reference ID number, File Name, and the Submission Type for the Record. The Submission Type can be File, Web Services, SIF, AFP or Individual Match. The Batch ID will be a hyperlink to the Info page.

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
Location Info	LEA Name (Code) School Name (Code)	Includes the name and code for the LEA and School associated to the Transaction. The names are hyperlinks to the Location Profile.
Process Info	Submission Date Submission Time	Includes the date and time the Batch was submitted to the application.
Record Info	Count of records in the current Batch Status Count of total records in the Batch Status	Includes counts to help determine progress of the Batch. The Status will indicate the current Status of the Batch.
Status Info	Progress Bar Status	Includes a 5-section status bar which visualizes the Status of the Batch and the text of the Status.
Actions		• Dropdown Menu: Click to view more actions. ○ Continue ○ Refresh ○ Resolve ○ View ○ Download ○ View Batch Details

Transactions Tab

The Transaction Tab includes all individual Transactions that the user is authorized to access.

Recent Activity (Past 30 Days) ↻ >>

BATCHES **TRANSACTIONS**

Pending - 5 Most Recent View Past 7 Days | View All >>

Transaction Info	Location Info	Process Info	Batch ID	Status Info	Actions
 12319 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	922	 Pending: In Progress	Refresh 
 12316 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	921	 Pending: In Progress	Refresh 
 12314 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	920	 Pending: Near Matches	Resolve 
 12313 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	920	 Pending: Near Matches	Resolve 
 12311 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/02/2020 3:00 PM	918	 Pending: Near Matches	Resolve 

Completed - 5 Most Recent View Past 7 Days | View All >>

Transaction Info	Location Info	Process Info	Batch ID	Status Info	Actions
12334 Search	Acadia Parish (027) Brownfields Elementary School (027018)	07/27/2022 3:00 PM	1003	 Completed	
12333 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	1002	 Completed	
12332 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	1002	 Completed	

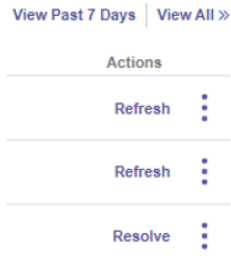
The table below describes each of the fields/columns available in the Transaction Tab view:

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
Alert	Icon 	If a Transaction is in a Pending state, the yellow exclamation icon will be displayed to alert the user of the Pending status.
Transaction Info	Transaction ID Submission Type	Includes the Transaction Reference ID number and the Submission Type for the Record. The Submission Type can be File, Web Services, SIF, AFP or Individual Match. The Transaction ID will be a hyperlink to the Info page.

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
Location Info	LEA Name (Code) School Name (Code)	Includes the name and code for the LEA and School associated to the Transaction. The names are hyperlinks to the Location Profile.
Process Info	Submission Date Submission Time	Includes the date and time the Transaction was submitted to the application.
Batch ID	Batch ID	If the Transaction is associated to a Batch, the Batch ID will be listed and will be a hyperlink to the Batch Info page.
Status Info	Progress Bar Status	Includes a 5-section status bar which visualizes the Status of the Transaction and the text of the Status.
Actions		• Dropdown Menu: Click to view more actions. - o Continue - o Refresh - o Resolve - o View - o Download - o View Transaction Details

Next Action Buttons/Links

Each Transaction/Batch will also include an Actions column which will direct the user to the next steps within the application.



If the Transaction/Batch is in the Pending section, a next action link will be available. This next action will navigate the user to the appropriate action for that Transaction/Batch.

ACTION	DESCRIPTION
Continue	Enables the user to continue a Transaction/Batch that is in a pause status.
Download	Enables the user to access the Transaction/Batch Info page that provides download capabilities.
Refresh	Enables the user to refresh the status of the Transaction/Batch.
Resolve	Enables the user to resolve the pending near matches for the Transaction/Batch.
View	Enables the user to view the Transaction/Batch Information Profile.

Lesson: How to Filter the data

1. Expand the Filter Options by clicking the Expand Filter Options button.
2. Enter or select the filter criteria.

Match History

BATCHES **TRANSACTIONS**

Batch ID : Submission Type : Status : **Filter Criteria**

District : School : Enrollment Year(School Year) : Process Date Range : **Filter Options**

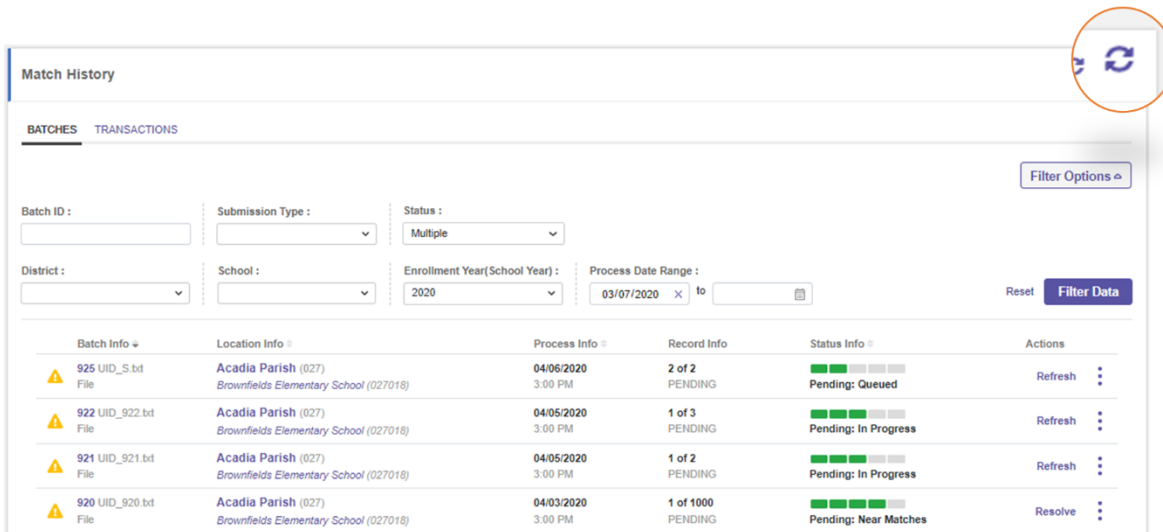
Filter Data or Reset

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
925 UID_S.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	 Pending: Queued	Refresh ⋮
922 UID_922.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	 Pending: In Progress	Refresh ⋮
921 UID_921.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 2 PENDING	 Pending: In Progress	Refresh ⋮
920 UID_920.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	 Pending: Near Matches	Resolve ⋮

- Click the Filter Data button to filter the data grid results.
- To clear the filter options, click the Reset link.

Lesson: How to Refresh Match History Data

1. On the Match History, locate the Match History panel.
2. Click on Refresh Icon () on the panel header.
3. The application will refresh the results displayed in the data grid.



Match History

BATCHES **TRANSACTIONS**

Filter Options

Batch ID : Submission Type : Status :

District : School : Enrollment Year(School Year) : Process Date Range : to

Reset **Filter Data**

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
 925 UID_S.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	 Pending: Queued	Refresh ⋮
 922 UID_922.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	 Pending: In Progress	Refresh ⋮
 921 UID_921.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 2 PENDING	 Pending: In Progress	Refresh ⋮
 920 UID_920.txt File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	 Pending: Near Matches	Resolve ⋮

Lesson: How to Access the Resolve Near Match Process

1. Locate a Near Match Transaction/Batch in the Match History panel.
2. Click on the Resolve link.

The Multiple Actions Icon will display a menu with Resolve as an option. Click either Resolve link.

04/05/2020 3:00 PM	1 of 2 PENDING	Pending: In Progress	Refresh
04/03/2020 3:00 PM	1 of 1000 PENDING	Pending: Near Match	Resolve
04/02/2020 3:00 PM	1000 of 190,002 PENDING	Pending: Near Match	Resolve Download View Batch Details

3. The application will display the Near Match List page.

NEAR MATCHES FOUND:

The system found Near Matches which should be reviewed and resolved by a user.
 Next Steps: Review Near Matches below

2 Near Matches

Filter Options ▾

Transaction ID :

Batch ID : 914

Submission Type :

Match Type :

District :

School :

School Year : 2020

Sort By : Max Match Score Desc

Reset

Filter Data

Pending Near Matches

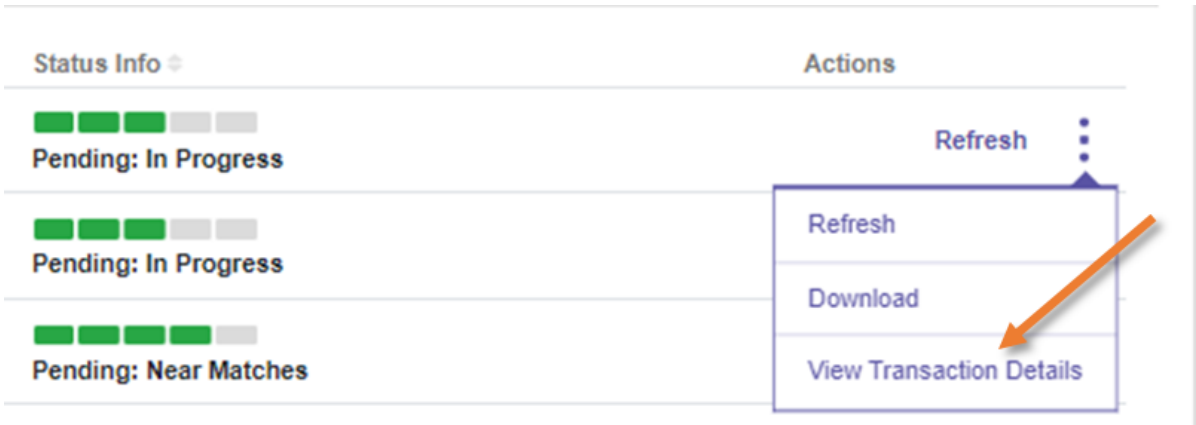
Submission Record Andrea L Hartman Acadia Parish (027) Brownfields Elementary School (027018)	DOB: 02/01/1992 Grade: 4 Local ID: 1122	Race: White Gender: Female SSN: 123-45-6789	94% Max Match Score	2 Potential Matches	⏏ ⌂ ⏩
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4. For more instructions on how to resolve Near Matches, refer to the [Lesson: How to Resolve Near Matches](#).

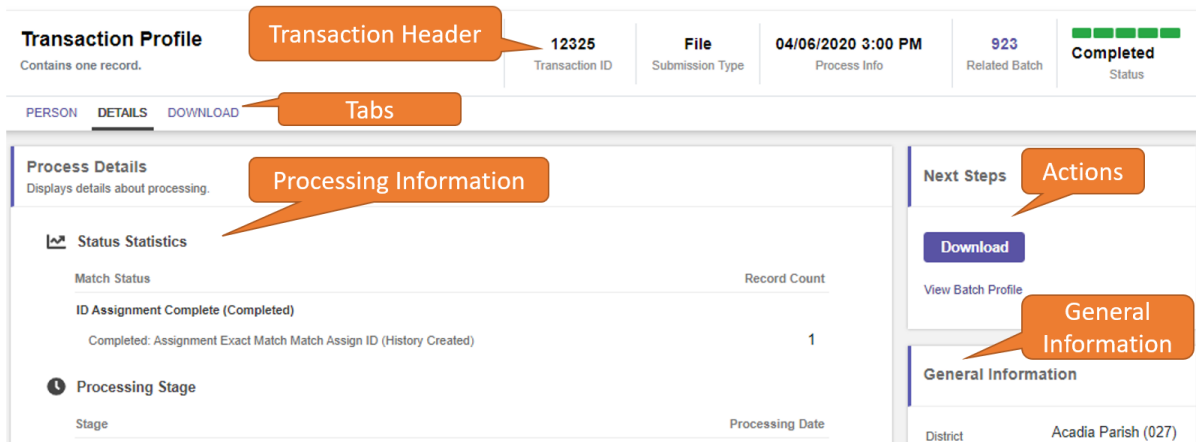
Lesson: How to Drill into Transaction Profile

1. Locate the Transaction in the Match History panel to be viewed.

2. Click on the Multiple Actions icon button () or the Transaction ID link.
3. The application will display a Multiple Action Menu.
4. Click on the View Transaction Details link to access the profile.

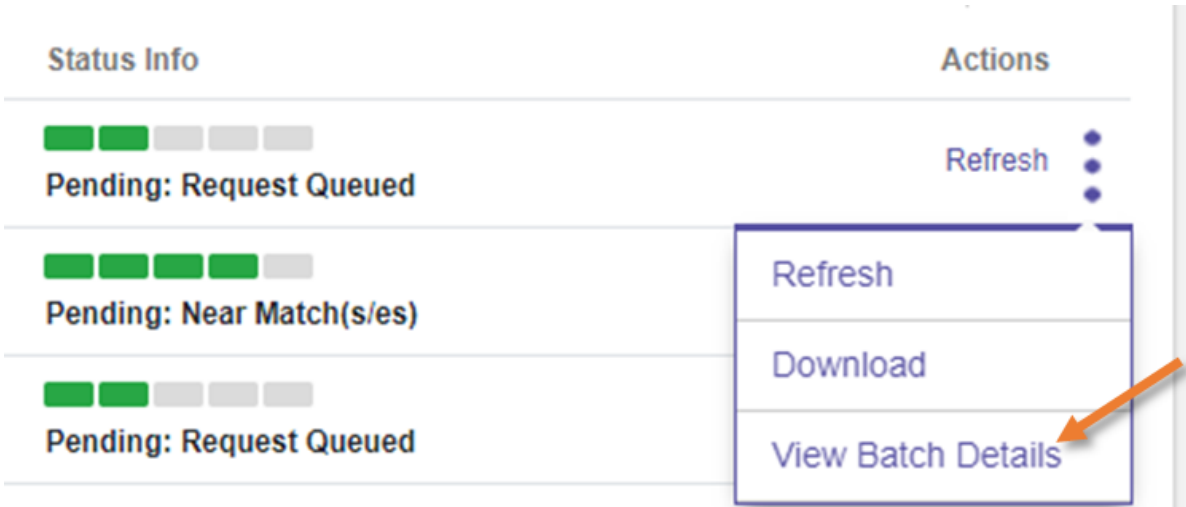


5. The application will display the Transaction Profile for the selected Transaction.

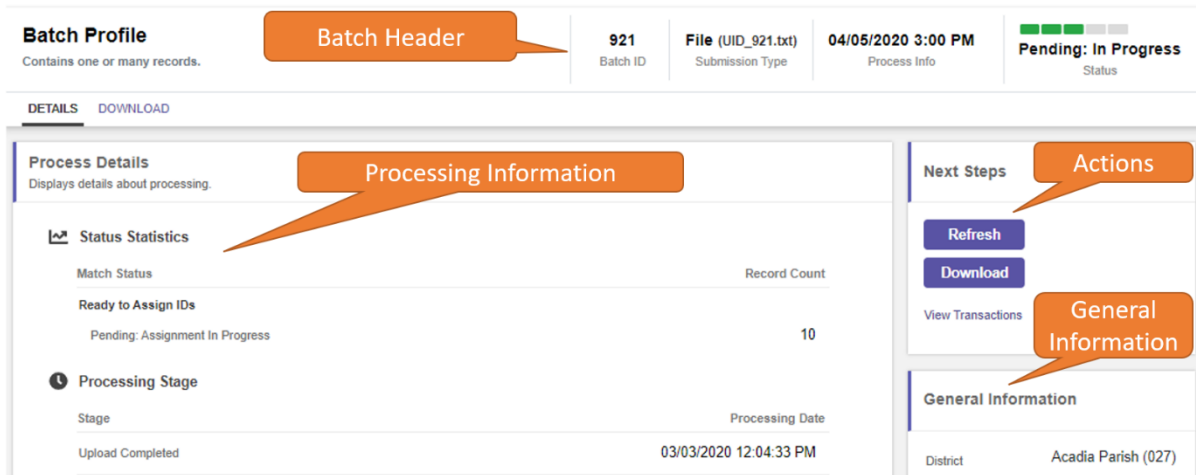


Lesson: How to Drill into Batch Profile

1. Locate the Batch in the Match History panel to be viewed.
2. Click on the Multiple Actions icon button () or the Batch ID link.
3. The application will display a Multiple Action Menu.
4. Click on the View Batch Details link to access the profile.

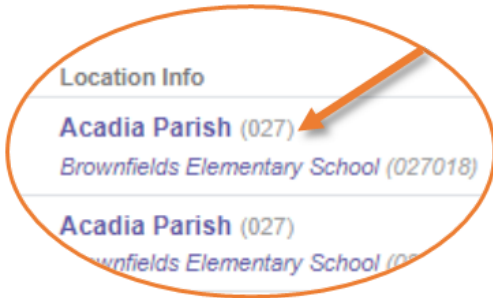


5. The application will display the Batch Profile for the selected Batch.



Lesson: How to Drill into Location Profile

1. Locate the Location Name in the Match History panel to be viewed.
2. Click on the Location Name link.



3. The application will display the Location Profile for the selected Location.

Acadia Parish

2402 N Parkerson Ave,
Crowley, LA 70526

ron.smith@acadiaparish.com

(222) 456-3422

Active

Status

8/25/2017

Start Date

N/A

End Date

10,550

Records

DETAILS

DOWNLOAD PERSON RECORDS

General

View General Profile Information

Location Information

District Name

Acadia Parish

District Code

027

Address

2402 N Parkerson Ave,

City

Crowley

State

Louisiana

Zip

70526

Contact Information

First Name

Ron

Last Name

Smith

Title

Superintendent

Next Steps

[Download Person Records for this location](#)

Download Person Records for the Location

[TOC](#)

Match Options

Chapter Highlights

- [Overview](#)
- [Person Match: Upload File](#)[Lesson: How to Match from Upload File](#)

Overview

The Match Options component enables users to perform matches.

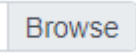
The Match Options page includes a Match Options form section and a Match Results section. The Match Results section is not displayed until a match request is performed.

Person Match: Upload File

The purpose of the Upload File tab is to allow authorized users to upload a file that includes one or many person records to match against.

The Uploaded File must match the specification that is identified in the Configuration Manager for Assign.

Lesson: How to Match from Upload File

1. Click on the Match Options icon () on the left navigation panel.
2. Select the Person Type.
3. To upload a file, click the  button to view the local computer system directory structure. The file must be accessible by the user on the local drive or network drive to upload the file.

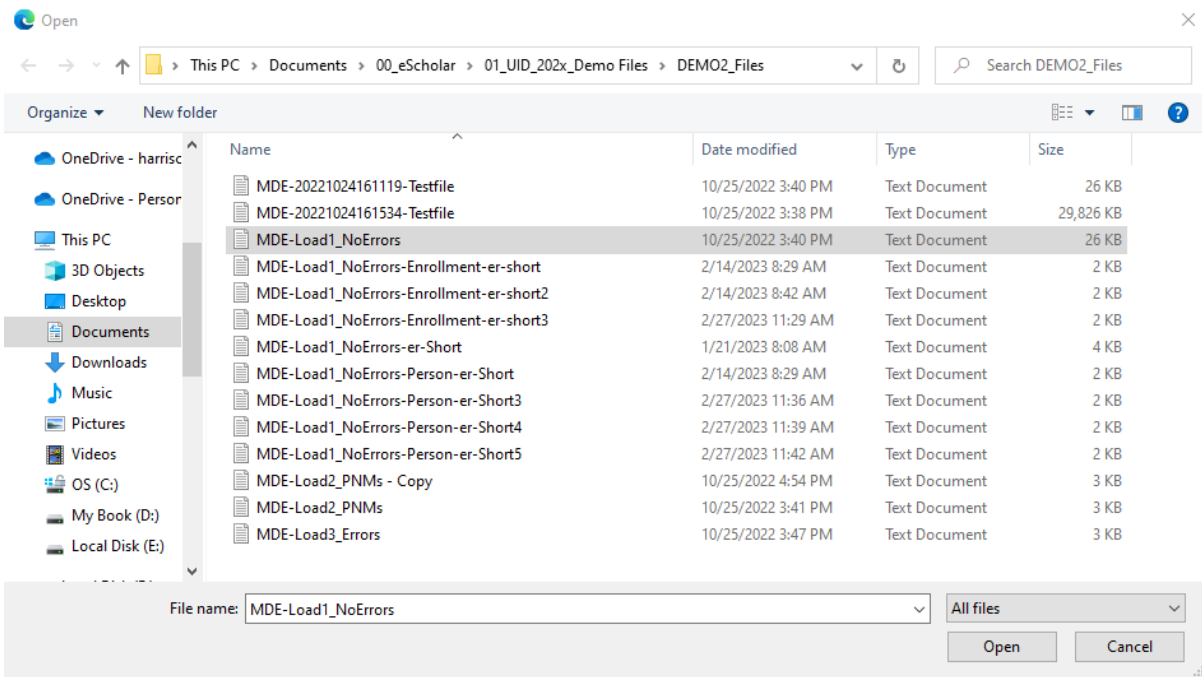
[Home](#) > Match Options

Match Options

Match Option	Upload File
Person Type	Student Staff
File to Upload	Browse
Upload Type	Simple Advanced

[Reset](#) **Match**

4. Select the file to upload. Click Open.



5. Click Match.

The screenshot shows the 'Match Options' form. It includes fields for 'Match Option', 'Person Type' (with 'Student' and 'Staff' buttons), 'File to Upload' (with a text input field containing 'MDE-Load1_NoErrors.txt' and a 'Browse' button), and 'Upload Type' (with 'Simple' and 'Advanced' buttons). A 'Reset' button and a 'Match' button are located at the bottom right.

6. View or drill into the match results.

The screenshot shows the 'Match Results' table. It has columns for Batch Info, Location Info, Process Info, Record Info, Status Info, and Actions. The first row shows a batch of 1 files, located at Acadia Parish (027), processed on 04/06/2020 at 3:00 PM, with 5 of 5 records pending. The status is 'Pending: Request Queued'.

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
917 UID_3.csv File	Acadia Parish (027) Brownfields Elementary School (027016)	04/06/2020 3:00 PM	5 of 5 PENDING	Pending: Request Queued	Refresh

Add Person

Chapter Highlights

- [Overview](#)
- [Form Fields](#)
- [Lesson: How to Match from Add Person](#)

Overview

The purpose of the Add Person is to allow users to initiate the UniqID process by submitting person information one person at a time using an online entry form. The data that is submitted in the form becomes a Submission Record that is compared to the Master Records. This creates an Individual Match submission type.

Form Fields

The form includes the following fields:

Home > Add a New Person ?

Add a New Person

Person Type: **Student** **Staff**

Submission Purpose: **Assignment**

Person Information

First Name

Middle Name (optional)

Last Name

Suffix (optional)

Alternate Last Name (optional)

Nickname (optional)

Contact Information

Address 1 (optional)

Address 2 (optional)

City (optional)

State (optional)

Zip (optional)

Geocode (optional)

Credential Information

Other Information

Birth Location (optional)

Residency Status (optional)

Residency Expiration Date (optional)

Mother's Maiden Name (optional)

Customer Defined Fields

Scroll down the page to see additional fields.

Gender: **Female** **Male** **Unknown**

Date of Birth

Social Security Number (optional)

Ethnicity Indicator

Race

Race 2 (optional)

Race 3 (optional)

Race 4 (optional)

Race 5 (optional)

Ethnic Sub Group (optional)

State ID (optional)

Highest Degree Earned (optional)

Subject Matter Area (optional)

Degree Provider (optional)

Certificate Number (optional)

Certificate Type (optional)

Email (optional)

Phone (optional)

Customer Defined Field 3 (optional)

Customer Defined Field 4 (optional)

Customer Defined Field 5 (optional)

Customer Defined Field 6 (optional)

Customer Defined Field 7 (optional)

Customer Defined Field 8 (optional)

Customer Defined Field - Date (optional)

Customer Defined Field - Number (optional)

Customer Defined Field - Code (optional)

Additional Location Information fields are available by scrolling down the page.

Location Information

Enrollment Year(School Year)

2022

District

School

Resident Location (optional)

Local ID

Source System

Alternate ID (optional)

Alternate ID Source (optional)

Active/Inactive Indicator (optional)

Source Refresh Date (optional)

Location Comment (optional)

Grade

2022

▼

▼

▼

▼

▼

▼

▼

mm/dd/yyyy

▼

Reset

Match

FIELDS/DATA	DESCRIPTION	FORM INFO
Person Type	Indicates the Person Type for the person.	Pre-selected to the default Person Type that set by Administrator.
Submission Purpose	Indicates the type of submission, such as ID or EN for assignment and enrollment respectively.	Defaults to "Assignment".
First Name	The legal first name of the person. Used for Matching.	Textbox. Required.
Middle Name	The legal middle name of the person. Used for Matching if provided.	Textbox. Optional by default but may be required by a System Administrator.
Last Name	The legal last name of the person. Used for Matching.	Textbox. Required.

74

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FIELDS/DATA	DESCRIPTION	FORM INFO
Suffix	A suffix used for the person. Used for Matching if provided.	Textbox. Optional by default but may be required by a System Administrator.
Alternate Last Name	An alternate last name that may have been used for the person. Used for Matching if provided.	Textbox. Optional by default but may be required by a System Administrator.
Nickname	The nickname of the person.	Textbox. Optional by default but may be required by a System Administrator.
Gender	The documented gender for the person. Used for Matching.	Button Group with valid gender options. Must select one option. Required.
DOB	The documented date of birth for the person. Used for Matching.	MM/DD/YYYY Date picker with a calendar selection. Required.
SSN	The documented Social Security Number for the person. Used for Matching if provided.	Must be a valid 9-digit SSN. Optional by default but may be required by a System Administrator.
Ethnicity Indicator	The documented ethnicity for the person.	Drop down menu with valid ethnicity options. Can select one option. Optional by default but may be required by a System Administrator.
Race	The documented race for the person.	Drop down menu with valid race options. Can select one option. Optional by default but may be required by a System Administrator.

FIELDS/DATA	DESCRIPTION	FORM INFO
Race 2	The documented 2nd race for the person.	Drop down menu with valid race options. Can select one option. Optional by default but may be required by a System Administrator.
Race 3	The documented 3rd race for the person.	Drop down menu with valid race options. Can select one option. Optional by default but may be required by a System Administrator.
Race 4	The documented 4th race for the person.	Drop down menu with valid race options. Can select one option. Optional by default but may be required by a System Administrator.
Race 5	The documented 5th race for the person.	Drop down menu with valid race options. Can select one option. Optional by default but may be required by a System Administrator.
Ethnic Sub-Group	Ethnicity sub-group for the person. A Sub-Group is linked to a Race	Drop down menu with valid Ethnicity Sub-Group. Can select one option. Optional by default but may be required by a System Administrator.
State ID	If the person has an existing State Identifier, it should be provided here.	Textbox. Optional.
Address 1	The documented current address for the person. This can be used for Address Matching.	Textbox. Optional by default but may be required by a System Administrator.

FIELDS/DATA	DESCRIPTION	FORM INFO
Address 2	The documented current secondary address for the person. This can include apartment numbers or suites.	Textbox. Optional by default but may be required by a System Administrator.
City	The documented current city for the person.	Textbox. Optional by default but may be required by a System Administrator.
State	The documented current state for the person.	Drop down menu with valid state options. Optional by default but may be required by a System Administrator.
Zip	The documented current zip for the person.	Textbox. Optional by default but may be required by a System Administrator.
Geocode	Indicates the Geocode of the Location if known.	Textbox. Optional by default but may be required by a System Administrator.
Highest Degree Earned	Indicates the Highest Degree Earned of the Person.	Drop down menu with valid Highest Degree Earned options. Optional by default but may be required by a System Administrator.
Subject Matter Area	Indicates the Subject Matter Area of the Person.	Drop down menu with valid Subject Matter Area options. Optional by default but may be required by a System Administrator.
Degree Provider	Indicates the Degree Provider of the Person.	Textbox. Optional by default but may be required by a System Administrator.

FIELDS/DATA	DESCRIPTION	FORM INFO
Certificate Number	Indicates the Certificate Number of the Person.	Textbox. Optional by default but may be required by a System Administrator.
Certificate Type	Indicates the Certificate Type of the Person.	Drop down menu with valid Certificate Type options. Optional by default but may be required by a System Administrator.
Birth Location	Indicates the Birth Location of the Person.	Textbox. Optional by default but may be required by a System Administrator.
Residency Status	Indicates the Residency Status of the Person.	Drop down menu with valid Residency Status options. Optional by default but may be required by a System Administrator.
Residency Expiration Date	Indicates the Residency Expiration Date of the Person.	MM/DD/YYYY Date picker with a calendar selection. Optional by default but may be required by a System Administrator.
Mother's Maiden Name	Indicates the Mother's Maiden Name of the Person.	Textbox. Optional by default but may be required by a System Administrator.
Customer Defined Fields	Indicates the Customer Defined Fields of the Person.	
School Year	Indicates the School Year to match of the Person.	Default to the School Year based on configuration by a System Administrator. Non editable field.

FIELDS/DATA	DESCRIPTION	FORM INFO
District	Indicates the district that should be used to process the match request.	This will be a single district listed or may enable the user to select a specific district depending on data authorization. See Lesson below for more details. Required.
School	Indicates the school that should be used to process the match request.	This will be a single school listed or may enable the user to select a specific school. Depends on data authorization. See Lesson below for more details. Required.
Resident Location	Indicates the Resident Location of the Person.	Drop down menu with valid Resident Location options. Optional by default but may be required by a System Administrator. Resident location is not tied to user location authorization.
Local ID	Indicates the Local ID of the Person.	Textbox. Required.
Source System	Indicates the Source System of the Match.	Drop down menu with valid Source System options. Required.
Alternate ID	Indicates the Alternate ID of the Person.	Textbox. Optional by default but may be required by a System Administrator.

FIELDS/DATA	DESCRIPTION	FORM INFO
		If Alternate ID Source is supplied, Alternate ID is required.
Alternate ID Source	Indicates the Alternate ID Source of the Person.	Drop down menu with valid Alternate ID Source options. Optional by default but may be required by a System Administrator. If Alternate ID is supplied, Alternate ID Source is required.
Active/Inactive Indicator	Indicates the status of the Person- Active, Inactive.	Drop down menu with valid Active/Inactive Indicator options. Required by default but may be optional by a System Administrator.
Source Refresh Date	Indicates the date that the source was refreshed.	MM/DD/YYYY Date picker with a calendar selection. Optional by default but may be required by a System Administrator.
Location Comment	Indicates the Comment of the Location.	Textbox. Optional by default but may be required by a System Administrator.
Grade	Indicates the Grade of the Person.	Drop down menu with valid Grade options. Optional by default but may be required by a System Administrator.
Hire Date	Indicates the date that a person was hired for a position, or consecutive positions within the same organization and job classification.	MM/DD/YYYY Date picker with a calendar selection. Optional by default but may be required by a System Administrator.

FIELDS/DATA	DESCRIPTION	FORM INFO
Annual Salary	Indicates the contractual salary of a person.	Textbox. Must be numeric. Optional by default but may be required by a System Administrator.
Job Classification	Indicates a general job classification that describes person that performs duties requiring a high degree of knowledge and skills generally acquired through at least a baccalaureate degree (or its equivalent obtained through special study and/or experience) including skills in the field of education, educational psychology, educational social work, or an education therapy field.	Drop down menu with valid Job Classification options. Optional by default but may be required by a System Administrator.
Job Assignment Primary	Indicates a job assignment that describes the specific primary assignment for the person.	Drop down menu with valid Job Assignment Primary options. Optional by default but may be required by a System Administrator.
Job Assignment Secondary	Indicates a job assignment that describes the specific secondary assignment for the person.	Drop down menu with valid Job Assignment Secondary options. Optional by default but may be required by a System Administrator.
Job Assignment Tertiary	Indicates a job assignment that describes the specific tertiary assignment for the person.	Drop down menu with valid Job Assignment Tertiary options. Optional by default but may be required by a System Administrator.

FIELDS/DATA	DESCRIPTION	FORM INFO
Itinerant Flag	An indication of whether a person provides instruction in more than one location.	Drop down menu with valid Itinerant Flag options. Optional by default but may be required by a System Administrator.
Reset	When Reset button is clicked, the form values will be set to the default values.	Button link

If there are errors in the form, the application will display an error page which includes field level error messages as shown below. The errors must be corrected before the form can be submitted again.

Lesson: How to Match from Add Person

1. Click on the Add Person icon () on the left navigation panel.
2. Complete the form. Refer to the fields listed above for form elements.

Add a New Person

Person Type

Student

Staff

Submission Purpose

Assignment

Person Information

First Name

Middle Name (optional)

Last Name

Suffix (optional)

Alternate Last Name (optional)

Full Person Name (optional)

Nickname (optional)

Gender

FemaleMaleUnknown

Date of Birth

mm/dd/yyyy

Contact Information

Address 1 (optional)

Address 2 (optional)

City (optional)

State (optional)

Zip (optional)

Geocode (optional)

Credential Information

Highest Degree Earned (optional)

Subject Matter Area (optional)

3. 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.
4. The application will perform a search with the data and return the results. Refer to How to Use the Match Results lesson below for more details.

Add a New Person					
Batch submitted. Review details below.					
Add a New Person					
Match Results					
Transaction Info	Location Info	Process Info	Batch ID	Status Info	Actions
893 Individual	Acadia Parish (027) Brownfields Elementary School (017018)	04/03/2020 3:00 PM	12	Pending: Near Matches	Resolve

[TOC](#)

83

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Match Results

Chapter Highlights

- [Overview](#)
- [Match Results Fields](#)
- [Lesson: How to Review Match Results](#)

Overview

When a match is performed with Person ID via Upload File or Add Person, the application will complete the Match Process described above and will return results. This panel is very similar to the Match History component and Recent Activity on the Dashboard in that the user can view the status of the Batch/Transaction and perform next actions such as Resolve or View Transaction.

The Match Results panel will include a Refresh button and the data and options listed below. To refresh the data in the Match Results panel, click the Refresh button ().

Match Results Fields

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
Transaction Info	Transaction ID Submission Type	Includes the Transaction Reference ID number and the Submission Type for the Record. The Submission Type can be File, Web Services, SIF,

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
		AFP or Individual Match. This is only visible for the Individual Match Option submission type.
Batch Info	Batch ID Submission Type	Includes the Batch ID number and the Submission Type for the Record. The Submission Type can be File, Web Services, SIF, AFP or Individual Match.
Location Info	LEA Name (Code) School Name (Code)	Includes the name and code for the LEA and School associated to the Transaction. The names are hyperlinks to the Location Profile.
Process Info	Submission Date Submission Time	Includes the date and time the Transaction was submitted to the application.
Batch ID	Batch ID	If the Transaction is associated to a Batch, the Batch ID will be listed and will be a hyperlink to the Batch Info page. This is only visible for the Individual Match submission type.
Record Info	Count of records in the current Batch Status Count of total records in the Batch Status	Includes counts to help determine progress of the Batch. The Status will indicate the current Status of the Batch. This is only visible for the Upload File submission type.
Status Info	Progress Bar Status	Includes a 5-section status bar which visualizes the Status of

COLUMN LABEL	FIELDS/DATA	DESCRIPTION
		the Transaction and the text of the Status.
Actions		• Dropdown Menu: Click to view more actions. - o Continue - o Refresh - o Resolve - o View - o Download - o View Transaction Details (This is only visible for the Individual Match submission type.) - o View Batch Details (This is only visible for the Upload File submission type.)

Lesson: How to View Match Results

1. Click on the Match Options icon () on the left navigation panel.
2. Perform a Match with Upload File. (This will also work with Add a Person. See Lesson: How to Match from Add Person.)
3. The application will display the Match Results panel below the search form and will include the data described above and shown below.
4. Person ID Match Results Example.

Add a New Person					
Batch submitted. Review details below.					
Add a New Person					

Match Results 					
Transaction Info	Location Info	Process Info	Batch ID	Status Info	Actions
 893 Individual	Acadia Parish (027) Brownfields Elementary School (017018)	04/03/2020 3:00 PM	12	 Pending: Near Matches	Resolve 

5. Upload File Match Results Example.

Match Options

Batch submitted. Review details below.

New Match

On the Match Options panel, the user will upload a file of student or staff records and the system will search for a batch that matches the records. Use the ellipse to drill into the match results. This will take the user to the batch profile page Details or Download.

Note: When using Advanced upload type do not include the file format header and footer.

The Process Details panel provides information about the batch processing stage. The user can also resolve any near matches by clicking the Resolve button in the Next Steps panel.

On the Download tab, the user can choose the match status to download by using the radio button. Download Options allows the user to choose Simple or Advanced download format. The Advanced button allows the user to select the delimiter type, the qualifier, the date format and whether to include the header and footer.

Match Results

917 UID_3.csv

File

Acadia Parish (027)

Brownfields Elementary School (027018)

04/06/2020

3:00 PM

5 of 5

PENDING

Pending: Request Queued

Refresh

6. If a next action is expected, the application will include a text link for the action. For example, the Resolve link will be displayed if there are pending Near Matches. Additionally, the application will include the Multiple Actions icon ().

Match Results					
Transaction Info ▾	Location Info ▾	Process Info ▾	Batch ID ▾	Status Info ▾	Actions
 893 Individual	Acadia Parish (027) <i>Brownfields Elementary School (017018)</i>	04/03/2020 3:00 PM	12	 Pending: Near Matches	Resolve 

7. Click the appropriate Next Action icon or link.

[TOC](#)

Resolve Near Matches

Chapter Highlights

- [Overview](#)
- [Near Match List](#)[Compare Records \(Near Match\)](#)
- [Lesson: How to Access the Near Match List](#)
- [Lesson: How to Filter the Near Match List](#)
- [Lesson: How to Resolve Near Matches](#)

Overview

If a Near Match is found, it means that a Master Record is a potential match to the Submission Record. Near Match records can be resolved by deciding whether a record is a Match, No Match, 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.

The pending Near Matches are accessible from the Dashboard Recent Activity Panel and Match Options component via the Resolve action link/button. When the Resolve link is clicked, the application will navigate to the Near Match List page and then users can access the Compare Near Match page from the list. Near Matches can be resolved from the Near Match List page or the Compare Near Match page.



The process of making a near match decision is important. When deciding, please review the information in detail to ensure you are making the correct decision.

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

FUNCTION	DESCRIPTION
Match	When the Match button is clicked, the Submission Record is linked to an existing Master record. When the Match button is clicked, all other near matches for the Submission Record are removed.
Create ID	When the Create ID button is clicked, all other near matches for the Submission Record are removed. The Submission Record will not be linked to an existing ID and a new ID will be created.
Cancel Submission Record	When the Cancel Submission Record link button is clicked, the Submission Record is canceled and all pending near matches for this Submission Record are canceled. This only cancels the specific Submission Record the user is reviewing and does not impact other Submission Records in the Batch.



System Administrators can enable/disable the above functionality based upon implementation needs. If a feature is not visible/accessible, it may not be enabled for the role.

Near Match List

The Near Match List page will display all pending near matches for the Batch or Transaction, depending on how the user accessed the list.

The page includes Near Match List Header, Filter options, and a list of Pending Near Matches.


NEAR MATCHES FOUND:

The system found Near Matches which should be reviewed and resolved by a user.
 Next Steps: Review Near Matches below

1

Near Matches

Filter Options

Transaction ID :
 Batch ID :
 Submission Type :
 Last Name :
 Identifier :
 Identifier Type :
 District :
 School :
 School Year :
 Process Date Range : to
 Sort By :
 Reset

Pending Near Matches

Submission Record
 Oliver Jones
 Acadia Parish (027)
 Brownfields Elementary School (027018)

Date of Birth: 09/23/2001
 Grade: Undergraduate
 Local ID: 12345

Race: White
 Gender: Male
 Social Security Number: 098-12-1133


 94% Max Match Score

4 Potential Matches



1 - 1 of 1

Previous 1 Next

Near Match Header

The Near Match Header includes basic information about the Near Matches.

	NEAR MATCH(S/ES) FOUND: The system found Near Match(s/es) which should be reviewed and resolved by a user. Next Steps: Review Near Match(s/es) below	1 Near Match(s/es)
DATA/FIELD	DESCRIPTION	
Panel Text	Displays "The system found Near Matches which should be reviewed and resolved by a user. Next Steps: Review Near Matches below".	
Near Matches	Displays the total count of pending Near Matches to be resolved for the Batch/Transaction.	

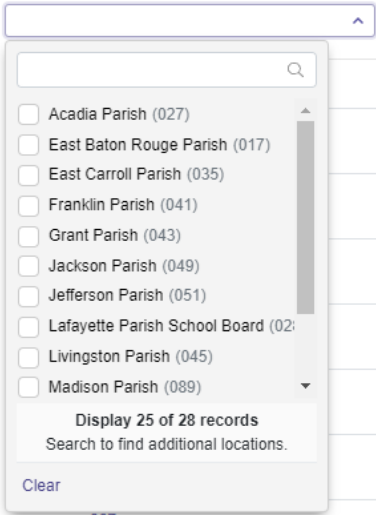
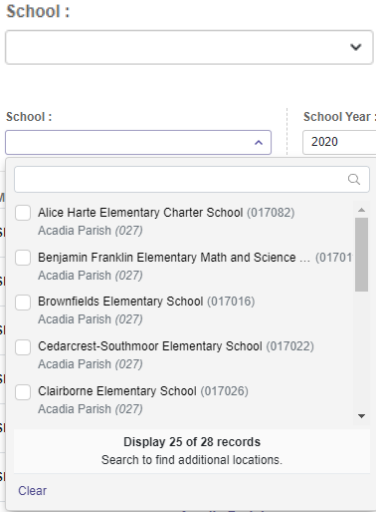
Filter Options

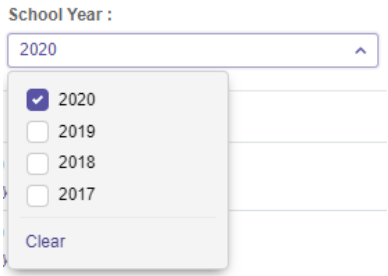
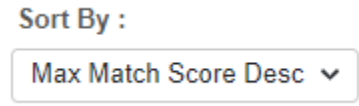
The Filter Option allows the Near Match List to be filtered based on specific needs, including by Transaction ID, Batch ID, School Year, and others as described below.

DATA/FIELD	IMAGE	DESCRIPTION
------------	-------	-------------

Transaction ID	Transaction ID :	Each Transaction is assigned a unique Transaction identifier. This filter field will restrict the results to the specific Transaction ID entered in this field. This option is not available on the Batch Tab. To filter on a Transaction ID, enter the ID in the Transaction ID field.
Batch ID	Batch ID :	Each Batch is assigned a unique Batch identifier. This filter field will restrict the results to the specific Batch ID entered in this field. To filter on a Batch ID, enter the ID in the Batch ID field.
Submission Type	Submission Type : ☐ File ☐ Individual Match ☐ SLF ☐ Edit ☐ WebService ☐ Automation Clear	The Submission Type filter will list all the Submission Type options available to the user. This may include: ▪ File ▪ Individual Match ▪ SIF

		- Edit - Web Services - Automation To filter on one or more of the options, click the selection box(es) to the left of the name. To clear all selected options, click the Clear link.
Last Name	Last Name : 	Last Name
Identifier	Identifier : 	Identifier
Identifier Type	Identifier Type : State ID ^ State ID Local ID	The Type of ID such as State, Local, etc
District	District : 	The District filter will list all the districts the user is authorized to view. This filter option also includes a search feature. To filter on one or more of the options, click the selection box(es) to the left of the name.

	District : 	To search for a specific District, enter at least 3 letters of the district name in the search field. To clear all selected options, click the Clear link.
School	School : 	The School filter will list all the schools the user is authorized to view. This filter option also includes a search feature. To filter on one or more of the options, click the selection box(es) to the left of the name. To search for a specific school, enter at least 3 letters of the school name in the search field. To clear all selected options, click the Clear link.

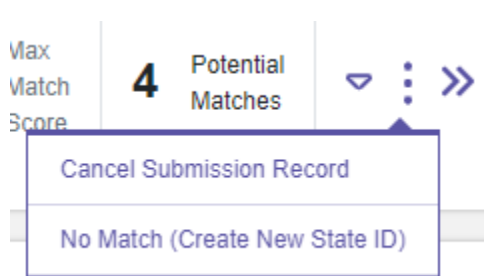
School Year		The School Year filter will list all the school year options. To filter on one or more of the options, click the selection box(es) to the left of the name. To clear all selected options, click the Clear link.
Process Date Range		The Process Date range filter for Submission Dates
Sort By		The Sort By option sorts the results by the selected option. The options are: • Max Match Score (Desc) • Max Match Score (Asc) • Last Name (Desc) • Last Name (Asc)

Pending Near Matches Section

The Pending Near Matches section will list one Near Match Record panel per Near Match. This allows users to resolve Near Matches or to drill into the Compare Near Match page. Each panel can be expanded to display all the potential matches for the record.

Near Match Record Panel

FIELDS/DATA	BATCH								
Panel Title	Submission Record								
Person Data	Name District and District Code School and School Code DOB Grade Local ID Race Gender SSN								
Match Information	Max Match Score in a Donut Chart Count of Potential Matches								
Actions	<table> <tr> <th>Icon</th><th>Description</th></tr> <tr> <td></td><td>Expand icon: When clicked, it will expand the details of the potential matches.</td></tr> <tr> <td></td><td>Collapse icon: When clicked, it will collapse the details of the potential matches.</td></tr> <tr> <td></td><td> The Multiple Actions icon: When clicked, it will display more options. - Cancel Submission Record: Allows the user to cancel the reviewing Submission Record and all pending near matches for this Submission Record. </td></tr> </table>	Icon	Description		Expand icon: When clicked, it will expand the details of the potential matches.		Collapse icon: When clicked, it will collapse the details of the potential matches.		The Multiple Actions icon: When clicked, it will display more options. - Cancel Submission Record: Allows the user to cancel the reviewing Submission Record and all pending near matches for this Submission Record.
Icon	Description								
	Expand icon: When clicked, it will expand the details of the potential matches.								
	Collapse icon: When clicked, it will collapse the details of the potential matches.								
	The Multiple Actions icon: When clicked, it will display more options. - Cancel Submission Record: Allows the user to cancel the reviewing Submission Record and all pending near matches for this Submission Record.								

	- No Match (Create New State ID): Allows the user to make a “No Match” decision for the Submission Record and create a new ID.  Max Match Score: 4 Potential Matches Cancel Submission Record No Match (Create New State ID)
	» Drill Into: When clicked, the application will navigate to the Compare Near Match page for the selected Submission Record.

Batch Near Match List Panel

NEAR MATCH(S/ES) FOUND:

The system found Near Match(s/es) which should be reviewed and resolved by a user.

Next Steps: Review Near Match(s/es) below

2

Near Match(s/es)

Transaction ID :

Batch ID :

Submission Type :

Last Name :

Identifier :

Identifier Type :

Location :

Building :

Enrollment Year(School Year) :

Process Date Range :

Sort By :

Filter Options

Reset

Filter Data

Pending Near Match(s/es)

Submission Record Oliver Jones Acadia Parish (027) Brownfields Elementary School (027018)	Date Of Birth: 12 / 15 / 2004 Grade: 09 Local ID: 12345	Race: White Gender: Male Social Security Number: -	100% Max Match Score	2 Potential Matches	»
Submission Record Tetiana Middle Martin GEOG DIST (027) GENEVA CITY SD (430700010000)	Date Of Birth: 12 / 12 / 2004 Grade: 09 Local ID: IN1	Race: White Gender: Male Social Security Number: -	95% Max Match Score	1 Potential Matches	»

1 - 2 of 2 Record(s)

Previous

1

Next

Potential Matches Section

DATA/FIELD	DESCRIPTION				
Person Name	Displays the First, Last Name and Unique Identifier of the potential Near Match (Master Record).				
Location	Displays the District Name and Code and School and Code of potential Near Match (Master Record).				
DOB	Displays the Date of Birth of the potential Near Match (Master Record).				
Grade	Displays the current Grade Level of the potential Near Match (Master Record).				
Local ID	Displays the Local ID of the person for the potential Near Match (Master Record).				
Race	Displays the current Race of the person for the potential Near Match (Master Record).				
Gender	Displays the Gender of the person for the potential Near Match (Master Record).				
SSN	Displays the Social Security Number of the person for the potential Near Match (Master Record). NOTE: This field may be masked.				
Match Score	Displays the Match Score for the potential Near Match (Master Record).				
Actions	<table> <tr> <th>Icon</th><th>Description</th></tr> <tr> <td></td><td>Match: Allows the user to make a "Match" decision for the Submission Record for the selected potential match displayed in the Potential Matches to Master Data section.</td></tr> </table>	Icon	Description		Match: Allows the user to make a "Match" decision for the Submission Record for the selected potential match displayed in the Potential Matches to Master Data section.
Icon	Description				
	Match: Allows the user to make a "Match" decision for the Submission Record for the selected potential match displayed in the Potential Matches to Master Data section.				

DATA/FIELD	DESCRIPTION	
		Drill Into: When clicked, the application will navigate to the Compare Near Match page for the selected Submission Record.

Collapsed Panel

Pending Near Matches

Submission Record

Oliver Jones
Acadia Parish (027)
Brownfields Elementary School (027018)

Date of Birth: **09/23/2001**
Grade: **Undergraduate**
Local ID: **12345**

Race: **White**
Gender: **Male**
Social Security Number: **098-12-1133**

94% Max Match Score

4 Potential Matches



1 - 1 of 1

Previous **1** Next

Legend

Match Indicators Decision Icons

 Near Match  Match

Click the down triangle to expand the Near Match data.

Expanded Panel

Pending Near Matches

Submission Record

Oliver Jones
Acadia Parish (027)
Brownfields Elementary School (027018)

Date of Birth: **09/23/2001**
Grade: **Undergraduate**
Local ID: **12345**

Race: **White**
Gender: **Male**
Social Security Number: **098-12-1133**

94% Max Match Score

4 Potential Matches



Potential Matches to Master Data

	Person Name	Location	Date of Birth	Grade	Local ID	Race	Gender	Social Security Number	Match Score	Actions
	Oliver S Jones (9818404011)	Acadia Parish (027) Crowley High (027743)	09/23/2000	Undergraduate	12345	White	Male		94%	 
	Oliver Jone (9818404111)	Acadia Parish (027) Brownfields Elementary School (027018)	09/23/2000	12		White	Male		87%	 
	Oliver L Jone (9818404122)	Acadia Parish (027) Brownfields Elementary School (027018)	09/22/2000	12		White	Male		87%	 
	Oliver Jone (9818404115)	Acadia Parish (027) Brownfields Elementary School (027018)	09/23/2001	12		White	Male		87%	 

1 - 1 of 1

Previous **1** Next

Click the up triangle to collapse the Near Match data.

Compare Records

The Compare Records page allows users to view a side-by-side comparison of the Submission Record to each potential Near Match. This comparison enables users to make informed Match Decisions by viewing all the data from each record. The Compare Records page includes Compare Records Header and Submission Record details.

The Compare Records page lists the Submission Record and all Near Matches that have been returned by the Matching Process. The differences between the Submission Record and the Near Match are highlighted. Once a user reviews the comparison between the records, a Match or No Match decision can be made, or the record can be canceled.

- The Match decision is made at an individual Near Match record level and will link the Submission Record to the “matched” Near Match Record. All other potential near matches will be canceled when a Match Decision is made.
- The Create ID (No Match) decision is made at the Submission Record level and indicates that none of the Near Matches listed are a match. All near matches are canceled and the record is not linked to any Index Records when a Create ID decision is made.
- A Cancel Submission Record decision cancels the entire submission and all related pending Near Matches.

Compare Records
The Near Matches for the submission record are displayed below.

920

12314

Pending

Pending Near Matches Queued
A Match Decision is required.
Record submitted by abhroshan@escholar.com on 05/12/2021

[View Pending Near Match List](#)
[View Transaction Details](#)

SUBMISSION RECORD

SOURCE: File

NEAR MATCH RECORD

SOURCE: Master Record

94%

Match Score

Match: ID 961504011

Update Master ☐ Yes ☐ No

NEAR MATCH RECORD

SOURCE: Master Record

87%

Match Score

Match: ID 961504011

Update Master ☐ Yes ☐ No

NEAR MATCH RECORD

SOURCE: Master Record

87%

Match Score

Match: ID 961504012

Update Master ☐ Yes ☐ No

Cancel Submission Record

No Match

Matching Fields			
First Name	Oliver	Oliver	Oliver
Middle Name	S		L
Last Name	Jones	Jone	Jone
Suffix			
Alternate Last Name			
Gender	Male	Male	Male
Date of Birth	09/23/2001	09/23/2000	09/22/2000



The process of making a near match decision is important. When deciding, please review all data points in detail to ensure you are making the correct decision.

Compare Near Match Header

The Compare Near Match Header provides details about the specific Near Match Records being reviewed on the page. The information displayed in the Compare Near Match Header depends on the type of Batch being reviewed by the user.

Compare Near Match Header

Compare Records

The Near Matches for the submission record are displayed below.

63
Batch ID

201257
Transaction ID

Pending

Compare Near Match Status Panel

The Status Panel indicates the status of the selected Near Match and provides next steps.

Pending

The user must resolve the Near Matches. The user can navigate to the Transaction Details page, the Home Page, or Pending Near Match List.



Pending Near Matches Queued

A Match Decision is required.
Record submitted by mobermeier@escholar.com on 11/14/2022

[View Pending Near Match List](#)
[View Home Page](#)
[View Transaction Details](#)

No Match Decision

No further steps are required for the Near Match and the user can navigate to the Transaction Details page or the Home Page or Pending Near Match List.

 No Match Decision (No Matching Record) The submission record was not matched to an existing record. Resolved by: Andrea Hartman on 05/22/2021	View Home Page View Transaction Details
--	--

Match

No further steps are required for the Near Match and the user can navigate to the Transaction Details page, the Home Page, or Pending Near Match List.

 Match Decision The submission record was matched to an existing record. Resolved by: Andrea Hartman on 05/22/2021	View Pending Near Match List View Transaction Details
--	--

Canceled

No further steps are required for the Near Match and the user can navigate to the Transaction Details page, the Home Page, or Pending Near Match List.

 Canceled The submission record has been canceled. Canceled by: Andrea Hartman on 05/22/2021	View Pending Near Match List View Transaction Details
--	--

Comparison Section / Submission Record Details

The Compare Records page includes a Submission Record details section which lists the fields categorized into Matching Fields, Person Information, Contact Information, Other Information, Customer Defined Fields, and Location Information. Each section displays the available fields for the Submission Record with all the Near Matches shown side-by-side.

The Compare Records page will display one Submission Record and up to three Near Matches. If there are more than three Near Matches, the application will include left and right navigation arrows to enable pagination across all the Near Matches.

ACTION ICON	DESCRIPTION
	Navigate the Near Match list to the left.

ACTION ICON	DESCRIPTION
	Navigate the Near Match list to the right. This icon will not be available if there are less than or equal to three Near Matches.



A System Administrator can disable fields in the application. If the fields are disabled, they will not be visible. If a field is described below, but not visible then the System Administrator has disabled the field.

As noted above, a Near Match can be in one of four stages: Pending, Create ID (Resolved), Match (Resolved) or Canceled (Resolved). The view of the Compare Near Match data will vary by stage, including the Status Panel described above.

The information displayed in the Submission Record details section depends on the type of Batch being reviewed by the user.

Once a Near Match has been resolved (Match, Create ID, or Canceled), the Near Match actions are no longer available/visible.

Compare Records

Pending Near Matches Queued

A Match Decision is required.
Record submitted by ahartman@escholar.com on 05/12/2021

[View Pending Near Match List](#)
[View Transaction Details](#)

Cancel Submission Record
No Match

SUBMISSION RECORD

SOURCE: File

NEAR MATCH RECORD

SOURCE: Master Record

94%

Match Score

Match: ID 9818404011

Update Master: ☐ Yes ☐ No

NEAR MATCH RECORD

SOURCE: Master Record

87%

Match Score

Match: ID 9818404111

Update Master: ☐ Yes ☐ No

NEAR MATCH RECORD

SOURCE: Master Record

87%

Match Score

Match: ID 9818404122

Matching Fields			
First Name	Oliver	Oliver	Oliver
Middle Name	S		L
Last Name	Jones	Jone	Jone
Suffix			
Alternate Last Name			
Gender	Male	Male	Male
Date of Birth	09/23/2000	09/23/2000	09/22/2000
Social Security Number			

Scroll to the bottom of the page to compare all data points. Check the school documentation, talk to staff who know the students and rely on documents such as birth certificates that were provided to the school upon enrollment.

Matching Fields

The Matching Fields section specifically lists all the fields that may have been used for matching purposes. These fields are important to list first because they will help the user decide on the Near Match. The Matching Fields are:

FIELDS/DATA	DESCRIPTION
First Name	Lists the First Name for the Submission Record and each Near Match (Master).
Middle Name	Lists the Middle Name for the Submission Record and each Near Match.

FIELDS/DATA	DESCRIPTION
Last Name	Lists the Last Name for the Submission Record and each Near Match.
Suffix Name	Lists the Suffix Name for the Submission Record and each Near Match.
Alternate Last Name	Lists the Alternate Name for the Submission Record and each Near Match.
Gender	Lists the Gender for the Submission Record and each Near Match.
DOB	Displays the Date of Birth for the Submission Record and each Near Match.
SSN	Lists the Social Security Number for the Submission Record and each Near Match. NOTE: This field may be masked.

Person Information

The Person Information section lists demographic data about the person. These fields are not used in the Matching Process. The fields help the user compare the values between the Submission Record and Near Matches (Master Records) to decide if the record is a Match or No Match. The fields are:

FIELDS/DATA	DESCRIPTION
Ethnicity	Displays the Ethnicity for the Submission Record and each Near Match.
Race	Displays the Race for the Submission Record and each Near Match.
Race 2	Displays the Race 2 for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Race 3	Displays the Race 3 for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Race 4	Displays the Race 4 for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Race 5	Displays the Race 5 for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Ethnic Subgroup	Displays the Ethnic Subgroup for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Nickname	Displays the Nickname for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.

Contact Information

The Contact Information section lists contact data for the person. These fields are not used in the Matching Process. The fields help the user compare the values between the Submission Record and Near Matches (Index Records) to decide if the record is a Match or No Match. The fields are:

FIELDS/DATA	DESCRIPTION
Address 1	Displays the Address for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Address 2	Displays the Address 2 for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
City	Displays the City for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
State	Displays the State for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Zip	Displays the Zip Code for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Geocode	Displays the Geocode for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.

Location Information

The Location Information section lists district and school data for the person. These fields are not used in the Matching Process. These fields help the user compare the values between the Submission Record and Near Matches (Index Records) to decide if the record is a Match or No Match. The fields are:

FIELDS/DATA	DESCRIPTION
Person Type	Displays the Person Type for the Submission Record and each Near Match.
School Year	Displays the School Year for the Submission Record and each Near Match.
District Code	Displays the District Code for the Submission Record and each Near Match.
School Code	Displays the School Code for the Submission Record and each Near Match.
Resident Location	Displays the Resident Location for the Submission Record and each Near Match.
Local ID	Displays the Local ID related to the Source System that submitted the data for the Submission Record and each Near Match.
Source	Displays the Source System that submitted the data for the Submission Record and each Near Match. It is related to the Local ID.
Alternate ID	Displays the Alternate ID related to the Alternate Source that submitted the data for the Submission Record and each Near Match.
Alternate Source	Displays the Alternate Source that submitted the data for the Submission Record and each Near Match. It is related to the Alternate ID.

FIELDS/DATA	DESCRIPTION
Active Location Count	Displays the Active Location Count for the Submission Record and each Near Match.
Source Refresh Date	Displays the Source Refresh Date for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Location Comment	Displays the Location Comment for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Grade	Displays the Grade Level for the Submission Record and each Near Match.
Hire Date	Displays the Hire Date for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Annual Salary	Displays the Annual Salary for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Job Classification	Displays the Job Classification for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Job Assignment Primary	Displays the Job Assignment Primary for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Job Assignment Secondary	Displays the Job Assignment Secondary for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.

FIELDS/DATA	DESCRIPTION
Job Assignment Tertiary	Displays the Job Assignment Tertiary for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Itinerant Flag	Displays the Itinerant Flag for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.

Credential Information

The Credential Information section lists credential data for the person. These fields are not used in the Matching Process. These fields help the user compare the values between the Submission Record and Near Matches (Index Records) to decide if the record is a Match or No Match. The fields are:

FIELDS/DATA	DESCRIPTION
Highest Degree Earned	Displays the Highest Degree Earned for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Subject Matter Area	Displays the Subject Matter Area for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Degree Provider	Displays the Degree Provider for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Certificate Number	Displays the Certificate Number for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.

Certificate Type	Displays the Certificate Type for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
------------------	---

Other Information

The Other Information section lists other data for the person. These fields are not used in the Matching Process. These fields help the user compare the values between the Submission Record and Near Matches (Index Records) to decide if the record is a Match or No Match. The fields are:

FIELDS/DATA	DESCRIPTION
Birth Location	Displays the Birth Location for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Residency Status	Displays the Residency Status for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Residence Expiration Date	Displays the Residence Expiration Date for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.
Mother's Maiden Name	Displays the Mother's Maiden Name for the Submission Record and each Near Match. This field may not be visible depending on how the System Administrator configured field visibility.

Transaction Information

The Transaction Information section lists transaction data. These fields are not used in the Matching Process. These fields help the user compare the values between the Submission Record and Near Matches (Index Records) to decide if the record is a Match or No Match. The fields are:

FIELDS/DATA	DESCRIPTION
Transaction Type	Displays the Transaction Type for the Submission Record and each Near Match.
Last Transaction ID	Displays the Last Transaction ID for the Submission Record and each Near Match.
Last Batch ID	Displays the Last Batch ID for the Submission Record and each Near Match.
Last Update Date	Displays the Last Update Date for the Submission Record and each Near Match.
Last Update User	Displays the Last Update User for the Submission Record and each Near Match.
ID Creation Date	Displays the ID Creation Date for the Submission Record and each Near Match.
ID Created By	Displays the ID Created By for the Submission Record and each Near Match.

Matching Information

The Matching Information section lists matching data for the transaction. These fields are not used in the Matching Process. These fields help the user compare the values between the Submission Record and Near Matches (Index Records) to decide if the record is a Match or No Match. The fields are:

FIELDS/DATA	DESCRIPTION
Match Score	Displays the Match Score to the Submission Record for each Near Match.
Match Decision	Displays the Match Decision for Submission Record and each Near Match.
Match Note	Displays the Match Note for Submission Record and each Near Match.

Match Trace	Displays the Match Trace for Submission Record and each Near Match.
Record Comments	Displays the Record Comments for Submission Record and each Near Match.
Record Status	Displays the Record Status for the Submission Record and each Near Match.

Lesson: How to Access the Near Match List

1. Navigate to the Dashboard or Match History component.
2. Locate a "Resolve" link for a Transaction or Batch.

The Multiple Actions Icon will display a menu with Resolve as an option. Click Resolve to see the near match compare panel.

Record Info	Status
1 of 10 PENDING	Pending: NM(s/es)
1 of 1 PENDING	Pending: NM(s/es)
1 of 1 PENDING	Pending: NM(s/es)
1 of 1 PENDING	Pending: NM(s/es)

3. Click Resolve to access the Near Matches for the Batch or Transaction.
4. The application will display the Near Match List page with the selected Batch or Transaction Near Match displayed.

NEAR MATCH(S/ES) FOUND: The system found Near Match(s/es) which should be reviewed and resolved by a user. Next Steps: Review Near Match(s/es) below

2 Near Match(es)

Filter Options

Transaction ID: Batch ID: 242 Submission Type: Last Name: Identifier: Identifier Type: State ID

Location: Building: Enrollment Year(School Year): Process Date Range: mm/dd/yyyy to mm/dd/yyyy Sort By: Max Match Score Desc

Reset Filter Data

Pending Near Match(s/es)

Submission Record Oliver Jones Acadia Parish (027) Brownfields Elementary School (027018)	Date Of Birth: 12 / 15 / 2004 Grade: 09 Local ID: 12345	Race: White Gender: Male Social Security Number: -	100% Max Match Score 2 Potential Matches	⌵ ⌵ ⌵ ⌵ ⌵ ⌵ ⌵ ⌵ ⌵ ⌵
Submission Record Tetiana Middle Martin GEOG DIST (027) GENEVA CITY SD (430700010000)	Date Of Birth: 12 / 12 / 2004 Grade: 09 Local ID: IN1	Race: White Gender: Male Social Security Number: -	95% Max Match Score 1 Potential Matches	⌵ ⌵ ⌵ ⌵ ⌵ ⌵ ⌵ ⌵ ⌵ ⌵

1 - 2 of 2 Record(s)

Previous 1 Next

Lesson: How to Filter the Near Match List

1. Navigate to the Near Match List page as described above.

NEAR MATCH(S/ES) FOUND: The system found Near Match(s/es) which should be reviewed and resolved by a user.
Next Steps: Review Near Match(s/es) below

2 Near Match(es)

Filter Options

Transaction ID: Batch ID: 242 Submission Type: Last Name: Identifier: Identifier Type: State ID

Location: Building: Enrollment Year(School Year): Process Date Range: mm/dd/yyyy to mm/dd/yyyy Sort By: Max Match Score Desc

Reset Filter Data

Pending Near Match(s/es)

Submission Record Oliver Jones Acadia Parish (027) Brownfields Elementary School (027018)	Date Of Birth: 12 / 15 / 2004 Grade: 09 Local ID: 12345	Race: White Gender: Male Social Security Number:	100% Max Match Score 2 Potential Matches	Filter Options
Submission Record Tetiana Middle Martin GEOG DIST (027) GENEVA CITY SD (430700010000)	Date Of Birth: 12 / 12 / 2004 Grade: 09 Local ID: IN1	Race: White Gender: Male Social Security Number:	95% Max Match Score 1 Potential Matches	Filter Options

1 - 2 of 2 Record(s)

Previous 1 Next

- By default, the application will display the Batch or Transaction that was selected on the prior page, but this information can be removed to apply different filters. The application will display the available filters as described above.

NEAR MATCHES FOUND: The system found Near Matches which should be reviewed and resolved by a user.
Next Steps: Review Near Matches below

1 Near Matches

Filter Options

Transaction ID: Batch ID: 920 Submission Type: Last Name: Identifier: Identifier Type: State ID

District: School: School Year: 2020 Process Date Range: 04/06/2020 to Sort By: Max Match Score Desc

Reset Filter Data

The Batch ID, Identifier Type, School Year and Data Process Range were selected when we drilled in from the previous page. Click Reset to remove all of the current filter settings.

Submission Record

Oliver Jones
Acadia Parish (027)
Brownfields Elementary School (027018)

Date of Birth: 09/23/2001
Grade: Undergraduate
Local ID: 12345

Race: White
Gender: Male
Social Security Number: 098-12-1133

94% Max Match Score
4 Potential Matches

Potential Matches to Master Data

Person Name	Location	Date of Birth	Grade	Local ID	Race	Gender	Social Security Number	Match Score	Actions
Oliver S Jones (9818404011)	Acadia Parish (027) Crowley High (027743)	09/23/2000	Undergraduate	12345	White	Male		94%	✓ >>

- Enter or select the appropriate filters.
- Click the Filter Data button to apply the filters to the list.
- The application will update the Near Match List based upon the selected filters.
- Click the Reset link to reset the filter options.

7. For more information, jump to: [Near Match: Filter Options.](#)

Lesson: How to Resolve Near Matches

1. Navigate to the Near Match List page as described above.

NEAR MATCH(S/ES) FOUND:

The system found Near Match(s/es) which should be reviewed and resolved by a user.

Next Steps: Review Near Match(s/es) below

2
(Near Match(s/es))

Transaction ID :

Batch ID :

Submission Type :

Last Name :

Identifier :

Identifier Type :

Location :

Building :

Enrollment Year(School Year) :

Process Date Range :

Sort By :

242

State ID

mm/dd/yyyy to mm/dd/yyyy

Max Match Score Desc

Reset

Filter Data

Pending Near Match(s/es)

1 - 2 of 2 Record(s)

Previous

1

Next

2. Review the Resolve Near Matches list page. Each card displays the submission record, and the collapsible section displays a list of Potential Matches.
3. Focus on one Submission Record at a time.
4. Click the Expand icon () in the Submission Record header to expand the Potential Matches section.

NEAR MATCHES FOUND:

The system found Near Matches which should be reviewed and resolved by a user.
 Next Steps: Review Near Matches below

1

Near Matches

Filter Options

Transaction ID :

Batch ID :

Submission Type :

Last Name :

Identifier :

Identifier Type :

District :

School :

School Year :

Process Date Range :

Sort By :

Reset

Filter Data

Pending Near Matches

Submission Record
Oliver Jones
 Acadia Parish (027)
 Brownfields Elementary School (027018)

Date of Birth: **09/23/2001**
 Grade: **Undergraduate**
 Local ID: **12345**

Race: **White**
 Gender: **Male**
 Social Security Number: **098-12-1133**

94%

Max Match Score

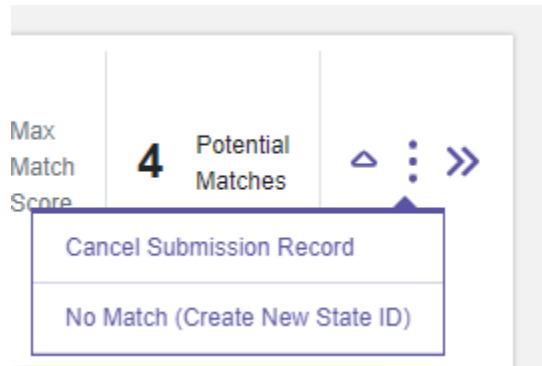
4

Potential Matches

Potential Matches to Master Data

Person Name	Location	Date of Birth	Grade	Local ID	Race	Gender	Social Security Number	Match Score	Actions
Oliver S Jones (9818404011)	Acadia Parish (027) Crowley High (027743)	09/23/2000	Undergraduate	12345	White	Male		94%	
Oliver Jone (9818404111)	Acadia Parish (027) Brownfields Elementary School (027018)	09/23/2000	12		White	Male		87%	
Oliver L Jone (9818404122)	Acadia Parish (027) Brownfields Elementary School (027018)	09/22/2000	12		White	Male		87%	
Oliver Jone (9818404115)	Acadia Parish (027) Brownfields Elementary School (027018)	09/23/2001	12		White	Male		87%	

5. The Potential Matches section will display one or many Near Matches with many of the matching fields visible in the list and the Match Score. The list will be sorted by the highest matching record at the top of the list based upon the Match Score.
6. Review the Potential Matches section as compared to the Submission record to determine if there are any Matches or if there are no Matches (No Match).
 - a. If there are no matching records to the Submission Record in the Potential Matches to Master Data section, click the multiple action icon in the Submission Record header to the right of the Submission Record details then click the 'No Match (Create New State ID) link on the dropdown. NOTE: If the No Match link is clicked, ALL potential Near Matches will be discarded. This decision should only be made if there are no matches listed in the Potential Matches to Master Data section.



- b. If the record is a Match to the Submission Record, click the Match icon (✓) in the Actions column to the right of the potential match record to be matched.
 - c. If additional information is necessary to make a Match Decision, click on the Drill In icon (>>) to navigate to the Compare Records page. This icon can be clicked from the Submission Record Header or from the Potential Matches to Master Data section, both options will navigate to the same page.
7. The Compare Records page displays the submitted person in the "Submission Record" column on the left and the Near Match Record(s) in columns on the right of the submission record column.

Cancel Submission Record **No Match**

SUBMISSION RECORD

SOURCE: File

NEAR MATCH RECORD

SOURCE: Master Record



94%

Match Score

Match: ID 9818404011

Update Master:

NEAR MATCH RECORD

SOURCE: Master Record



87%

Match Score

Match: ID 9818404111

Update Master:

NEAR MATCH RECORD

SOURCE: Master Record



87%

Match Score

Match: ID 9818404122

Matching Fields	1	1	1
First Name Oliver	Oliver	Oliver	Oliver
Middle Name	S		L
Last Name Jones	Jones	Jone	Jone
Suffix			
Alternate Last Name			
Gender Male	Male	Male	Male
Date of Birth 09/23/2001	09/23/2000	09/23/2000	09/22/2000
Social Security Number 098-12-1133			

- a. The Near Matches will be listed from left to right, with the highest and most likely match to the left and closest to the Submission Record.
 - b. All fields that are different between Submission Record and Near Match Records are highlighted in yellow.
 - c. If a near match was forced by the application, the application will list the reason for the near match within the "Match Notes" row. This may include a note about the Twins Rule, SSN Rules or other forced near match scenarios.
8. If more than three Near Matches are available, the application will display a left and right navigation icon. Click the icons to navigate between all the potential matches.
 9. Review all Near Matches, including the highlighted differences and Match Score to determine if there is a Match or if there are no matches (No Match).
 - a. A Near Match is only resolved once, so once a decision button (Match, No Match or Cancel) is clicked, the Near Match is resolved and will disappear from the Near Match List. Once a decision is submitted, it cannot be reverted.
 10. To resolve a near match a user can click on Match, No Match, or cancel the record.

Pending Near Matches Queued
 A Match Decision is required.
 Record submitted by ahartman@escholar.com on 05/12/2021

[View Pending Near Match List](#)
[View Transaction Details](#)

[Cancel Submission Record](#)
[No Match](#)

SUBMISSION RECORD

SOURCE: File

NEAR MATCH RECORD

SOURCE: Master Record

94%

Match Score

Match: ID 9818404011

Update Master: ☐ Yes ☐ No

NEAR MATCH RECORD

SOURCE: Master Record

87%

Match Score

Match: ID 9818404111

Update Master: ☐ Yes ☐ No

NEAR MATCH RECORD

SOURCE: Master Record

87%

Match Score

Match: ID 9818404122

Update Master: ☐ Yes ☐ No

Matching Fields			
First Name	Oliver	Oliver	Oliver
Middle Name	S		L
Last Name	Jones	Jone	Jone

- a. If there are no matching records to the Submission Record in the listed

Near Matches, click the No Match button ([No Match](#)). NOTE: If the No Match button is clicked, ALL potential Near Matches will be discarded. This decision should only be made if there are no matches listed in the Near Match details.

- b. If the Near Match Record is a Match to the Submission Record, click the

Match button ([Match: ID 9818404011](#)) in the Near Match column below the record to be matched. The Match button will include the **State ID** of the Near Match (Index Record).

- c. If the Submission Record should be canceled, click the “Cancel Submission Record” link.

- i. When the Cancel Submission Record link is clicked, all the pending near match will be canceled. If a pending near match is canceled, no match determination is made, and the record must be resubmitted to the application.

[TOC](#)

Search

Chapter Highlights

- [Overview](#)
- [Search By Person](#)
- [Search by ID](#)
- [Search by Location](#)
- [Search by File](#)
- [Search Result](#)
- [Download Search Information](#)
- [Lesson: How to Search by Person](#)
- [Lesson: How to Search by ID](#)
- [Lesson: How to Search by Location](#)
- [Lesson: How to Download Person Records by Location](#)
- [Lesson: How to Search by File](#)

Overview

The Search Options feature enables users to search for persons by Person Information, by ID, by Location, or by File, and to download the results. The Search page includes the Search Form and Search Results sections. Each option is described below.

Search by Person

The Search by Person form includes several fields to locate a specific person.

Search Options

BY PERSON

BY ID

BY LOCATION

BY FILE

Q Search Settings

Person Type

Early Childhood

Homeschool Student

K12 Student

Non-Public Student

Staff

Workforce

Search In

Master

History

Stage

Match Method

Matching Engine

SQL

Person Information

First Name

Middle Name (optional)

Last Name

Suffix (optional)

Date Of Birth (optional)

mm/dd/yyyy

Gender (optional)

Female

Male

Male 2

Reset

Search

FIELDS/DATA	DESCRIPTION
First Name	The First Name of the person.
Middle Name	The Middle Name of the person.
Last Name	The Last Name of the person.
Suffix	The Suffix of the person.
Date of Birth	The DOB of the person.
Person Type	The Type of Person being searched such as Student, Staff, etc.
Search In	The list to search in. Options include Master, History, or Stage.

FIELDS/DATA	DESCRIPTION
Match Method	The Type of Matching used. Options include Matching Engine or SQL. 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.
Gender	The Gender of the Person being searched. The form will list the valid options.
Reset Link	The Reset link button will reset the search form to the default values.
Search	The Search button will submit the search request using the search criteria.

Search by ID

The Search by ID form includes several fields to locate a specific person.

[Home](#) > Search Options

Search Options

[BY PERSON](#)
[BY ID](#)
[BY LOCATION](#)
[BY FILE](#)

ID Type

State ID

Local ID

Social Security Number

Person Type

All

Student

Staff

Identifier

Reset

Search

FIELDS/DATA	DESCRIPTION
ID Type	The Type of ID to search includes State ID, Local ID, Social Security Number.
Person Type	The Person Type includes All, Student, or Staff.
Identifier	When searching for a specific person, a State ID can be entered into this field to restrict the results to a specific person.
Reset Link	The Reset link button will reset the search form to the default values.
Search	The Search button will submit the search request using the search criteria.

Search by Location

The Search by Location form includes several fields to locate a specific person.

[Home](#) > [Search Options](#)

Search Options

[BY PERSON](#)
[BY ID](#)
[BY LOCATION](#)
[BY FILE](#)

District

School (optional)

Active/Inactive Indicator

All
Active
Inactive

Enrollment Year(School Year) (optional)

Reset
Search

FIELDS/DATA	DESCRIPTION
District	The District to search for persons currently enrolled in the selected District.
School	The School to search for persons currently enrolled in the selected School.
Active/Inactive Indicator	Select if the person is Active or Inactive, or All statuses.
School Year	Current School Year to search.
Reset Link	The Reset link button will reset the search form to the default values.
Search	The Search button will submit the search request using the search criteria.

Search by File

The Search by File form includes several fields to locate a specific person.

[Home](#) > [Search Options](#)

Search Options

[BY PERSON](#)
[BY ID](#)
[BY LOCATION](#)
[BY FILE](#)

Type

New Search File

Find Previous File Search

File to Upload

Browse

Person Type

Student

Staff

Upload Type

Simple

Advanced

Reset

Search

FIELDS/DATA	DESCRIPTION
Type	Indicates if a New Search File will be used or Find a Previous File used to search.
File to Upload	If New Search File is selected, select the file.
Person Type	If New Search File is selected, select the Person Type.
Upload Type	If New Search File is selected, select Simple or Advanced just like the Upload a File functionality.
Date Range	If Find a Previous File is selected, enter the date range to search.
Search Number	If Find a Previous File is selected, enter the search number to search.

FIELDS/DATA	DESCRIPTION
Reset Link	The Reset link button will reset the search form to the default values.
Search	The Search button will submit the search request using the search criteria.

Search Result

Once a search is initiated on any of the Search tabs, the application will display the Search Results matching the search criteria. The Search Results panel includes filters to further filter the Search Results. Each record also includes Actions and more details about each match.

Extract File

Extract Date	Match Type	Location Info	School Year	Record Count	Extract Name	Extract Status	Actions
04/06/2020 3:00 PM	SNAP	Acadia Parish (027) Brownfields Elementary School (01718)	2020	190,002 of 190,002	dm_SNAP_06082020_1.txt	Completed	Download

Search Results

+ Add New Person

Filter Options

Gender :
Ethnicity Indicator :
Race :
Grade :
District :
School :

Reset Filter Data

State ID	Name	Date of Birth	Gender	Ethnicity Indicator / Race	Social Security Number	Grade	Location Info	ID Info	Match Score	Actions
937948987854	Allan, Keith	02/05/2011	Male	Hispanic White	###-##-7654	--	Multiple Districts Multiple Schools	008 PS	87%	>>
712348989642	Avery, Isaac	08/12/2012	Male	Non-Hispanic American Indian/ Alaskan Native	###-##-2344	12	Acadia Parish (027) Multiple Schools	002 PS	87%	>>

FIELDS/DATA	DESCRIPTION
Match Indicator icon	The Match Indicator icon indicates whether the match falls into a Match or a Near Match status. Match Indicators Match Near Match
State ID	Displays the State ID.
Name	Displays the First and Last Name.
DOB	Displays the Date of Birth.

FIELDS/DATA	DESCRIPTION
Gender	Displays the Gender.
Ethnicity Indicator / Race	Displays the Ethnicity / Race.
SSN	Displays the SSN if enabled.
Grade	Displays the current Grade.
Location Info	Displays the District Name, District Code, School Name and School Code.
ID Info	Displays the Local ID and Source System.
Match Score	Displays the Match Score.
Actions	Drill-In: Allows the user to drill into the Person Profile.

No Records Found

If no matches are found for the search criteria, the application displays a message below the search form indicating that no matches were found. When this occurs, users should adjust the search criteria and re-submit the form.

Download - Search Information

The Search Information profile displays the Search Date, Search Result count and a Download Options panel. The Download Options panel includes a download form for the user to customize the download file.

Search Information		04/05/2020 4:00 PM Search Date	37 Search Result
DOWNLOAD			
Download Options			
Format File Format Version 3.0 Delimiter <input checked="" type="button" value="Tab"/> Comma Qualifier <input)"="" type="button" value="Double Quotes ("/> <input checked="" type="button" value="none"/> Date Format mm/dd/yyyy Include Header/Footer Yes <input checked="" type="button" value="No"/>			
			Generate Extract

FIELDS/DATA	DESCRIPTION
File Format	The only option is File Format Version 3.0.
Delimiter	Provides a list of download delimiter options, including comma or tab. One button/option must be selected.
Qualifier	Provides a list of download qualifier options, including single quote (') or double quote (") or none. One button/option must be selected.
Date Format	Provides a drop-down menu with options for the download date format. One option must be selected.
Include Header/Footer	Indicates if the header/footer are included in the download file, including Yes or No. One button/option must be selected.
Generate Extract	Serves as the form submission button and will initiate the download process.

When the Download Generate Extract button is clicked, the application will display an Extract File(s) panel. This panel will list all the extracts that have been generated by the request. The Extract Files panel includes a Refresh icon (), Download All link and a data grid listing all the downloads.

Extract File (1)					
Extract Date ▾	Location Info ▲	Record Count ▾	Extract Name ▾	Extract Status ▾	Actions
04/06/2020 3:00 PM	Acadia Parish (027) Brownfields Elementary School (027018)	2 of 2	pid_search_1003_04232020_131402_ide_can.txt	Completed	Download

The following fields are returned in the data grid:

FIELDS/DATA	DESCRIPTION
Extract Date	Indicates the date and time the extract was initiated.
Location Info	Indicates the District Name, District Code, School Name, and School Code for the extract.
School Year	Indicates the School Year for the records in the extract.
Record Count	Indicates the count of records in the extract.
Extract Name	Indicates the file name that was generated by the system for the extract.
Extract Status	Indicates the status of the extract, including Interrupted, In Progress or Completed. A file cannot be downloaded until it has completed the file generation process.
Actions	Provides a list of valid actions based on the status of the extract, including Refresh or Download. Refresh – When clicked, the extract information for the specific download will be updated. Download – When clicked, the extract will be downloaded/available.

Lesson: How to Search by Person.

1. Click on the Search icon on the side navigation panel. 
2. Select the appropriate criteria for the person you are searching.

Search Options

BY PERSON
BY ID
BY LOCATION
BY FILE

Search Settings

Person Type
Early Childhood
Homeschool Student
K12 Student
Non-Public Student
Staff
Workforce

Search In
Master
History
Stage

Match Method
Matching Engine
SQL

Person Information

First Name

Middle Name (optional)

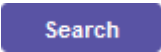
Last Name

Suffix (optional)

Date Of Birth (optional)
mm/dd/yyyy

Gender (optional)
Female
Male
Male 2

Reset
Search

3. Click the Search button. 
4. The Search results will be displayed. Filter if necessary.

Gender :
Ethnicity Indicator :
Race :
Grade :
District :
School :

Filter Options
Reset
Filter Data

State ID	Name	Date of Birth	Gender	Ethnicity Indicator / Race	Social Security Number	Grade	Location Info	ID Info	Match Score	Actions
937948987854	Allan, Keith	02/05/2011	Male	Hispanic White	###-##-7654	--	Multiple Districts Multiple Schools	008 PS	87%	>>
712348989642	Avery, Isaac	08/12/2012	Male	Non-Hispanic American Indian/ Alaskan Native	###-##-2344	12	Acadia Parish (027) Multiple Schools	002 PS	87%	>>
937948981122	Berry, Neil	08/12/2008	Male	Non-Hispanic White	###-##-1125	6	Acadia Parish (027) Alice Harte Elementary Charter School (027082)	003 PS	87%	>>

5. Click the Actions  icon to view the Person Profile to determine if the record is a match. See the "Person Profile" section for more details.

6. If you do not see a match, you can create a New Person by clicking the Add New Person button.

Search Results

+ Add New Person

Filter Options

Gender: Ethnicity Indicator: Race: Grade: District: School:

Reset Filter Data

State ID	Name	Date of Birth	Gender	Ethnicity Indicator / Race	Social Security Number	Grade	Location Info	ID Info	Match Score	Actions
937948987854	Allan, Keith	02/05/2011	Male	Hispanic White	###-##-7654	--	Multiple Districts Multiple Schools	008 PS	87%	>>
712348989642	Avery, Isaac	08/12/2012	Male	Non-Hispanic American Indian/ Alaskan Native	###-##-2344	12	Acadia Parish (027) Multiple Schools	002 PS	87%	>>
937948981122	Berry, Neil	08/12/2008	Male	Non-Hispanic White	###-##-1125	6	Acadia Parish (027) Alice Harte Elementary Charter School (027062)	003 PS	87%	>>

Lesson: How to Search by ID

1. Click on the Search icon on the side navigation panel.
2. Click By ID.
3. Enter the appropriate ID number.



Search Options

BY PERSON **BY ID** BY LOCATION BY FILE

Person Type: **All** Student Staff

ID Type: **State ID** Local ID Social Security Number

Identifier:

Reset **Search**

Enter the ID number

4. Click Search.

Search Results [+ Add New Person](#)

Grade: District: School:

[Filter Options](#) [Reset](#) [Filter Data](#)

State ID	Name	Date of Birth	Gender	Ethnicity Indicator / Race	Social Security Number	Grade	Location Info	ID Info	Match Score	Actions
39394899384	Clarkson, Alexandra	06/12/2012	Female	Non-Hispanic White	###-##-2345	--	Multiple Districts Multiple Schools	001 PS	N/A	»

1 - 1 of 1 [Previous](#) [Next](#)

Click to drill into the results.

5. The results link will take the user to the Person Profile.



Andrea L Hartman

Person Type(s): Student | Staff

03/12/2020

Created

09/12/2020

Last Updated

3

History Records

OVERVIEW

MASTER RECORD

ENROLLMENT (v2023.x)

HISTORY RECORDS

MERGED RECORDS

DIRECTMATCH

Master Record Highlights

>>

Person Information

First Name

Andrea

Middle Name

L

Last Name

Hartman

Alternate Last Name

Gender

Female

Date of Birth

02/01/1992

Pending Near Matches

2 of 2 Pending Near Matches

Andrea Hartman

Brownfields Elementary School

Local ID: 32345

>>

Andrea L Hartman

Brownfields Elementary School

Local ID: 12345

>>

Lesson: How to Search by Location

1. Click on the Search icon on the side navigation panel.
2. Click By Location.
3. Select the appropriate criteria.



Search Options

BY PERSON BY ID **BY LOCATION** BY FILE

Person Type: **Student** Staff

District: Acadia Parish (027)

School (optional): Broadmoor Senior High School (027016)

Active/Inactive Indicator: All **Active** Inactive

Enrollment Year(School Year) (optional): 2022

Reset Search

4. Click the Search button.
5. The Search results will be displayed. Filter if necessary.

Search Results

Download + Add New Person

Filter Options

Grade:

Filter Data – select desired filter options

Reset Filter Data

Download all person results from the location selected

Drill In

State ID	Name	Date of Birth	Gender	Ethnicity Indicator / Race	Social Security Number	Grade	Location Info	ID Info	Match Score	Actions
938948987788	Fisher, Sally	09/09/2010	Female	Non-Hispanic Black	###-##-8956	4	Acadia Parish (027) Multiple Schools	006 PS	N/A	>>
737558980763	Davidson, Justin	08/12/2010	Male	Non-Hispanic Native Hawaiian or other Pacific Islander	###-##-6543	12	Acadia Parish (027) Benjamin Franklin Elementary Math and Science School (027011)	007 PS	N/A	>>
937948987854	Allan, Keith	02/05/2011	Male	Hispanic White	###-##-7854	--	Acadia Parish (027) Benjamin Franklin Elementary Math and Science School (027011)			>>
2837736293	Hartman, Andrea	02/01/1992	Female	Non-Hispanic White	###-##-9888	4	Acadia Parish (027) Brownfields Elementary School (027016)	1234 SIS	N/A	>>

Lesson: How to Download Person Records by Location

1. Click on the Search icon on the side navigation panel.
2. Click By Location.
3. Select the appropriate criteria.



Search Options

BY PERSON BY ID **BY LOCATION** BY FILE

Person Type: **Student** Staff

District: Acadia Parish (027)

School (optional): Broadmoor Senior High School (027016)

Active/Inactive Indicator: All **Active** Inactive

Enrollment Year(School Year) (optional): 2022

Reset Search

4. Click the Search button.
5. The Search results will be displayed. Click Download.

Search Results

Download all person results from the location selected

Download + Add New Person

Filter Options

Grade:

Reset Filter Data

State ID	Name	Date of Birth	Gender	Ethnicity Indicator / Race	Social Security Number	Grade	Location Info	ID Info	Match Score	Actions
938948987788	Fisher, Sally	09/09/2010	Female	Non-Hispanic Black	###-##-8956	4	Acadia Parish (027) Multiple Schools	006 PS	N/A	>>
737558980763	Davidson, Justin	08/12/2010	Male	Non-Hispanic Native Hawaiian or other Pacific Islander	###-##-6543	12	Acadia Parish (027) Benjamin Franklin Elementary Math and Science School (027011)	007 PS	N/A	>>
937948987854	Allan, Keith	02/05/2011	Male	Hispanic White	###-##-7854	--	Acadia Parish (027) Benjamin Franklin Elementary Math and Science School (027011)	008 PS	N/A	>>
2837736293	Hartman, Andrea	02/01/1992	Female	Non-Hispanic White	###-##-9888	4	Acadia Parish (027) Brownfields Elementary School (027016)	1234 SIS	N/A	>>

6. Click Generate Extract.

Download Options

 **Format**

File Format

Version 3.0

Delimiter

Tab

Comma

Qualifier

Double Quotes (")

none

Date Format

mm/dd/yyyy

▼

Include Headers/Footer

Yes

No

Click Generate Extract

Generate Extract

7. Click Download.

Extract File						
Extract Date	Location Info	School Year	Record Count	Extract Name	Extract Status	Actions
11/22/2022 2:34 PM	Acadia Parish (027) Brownfields Elementary School (01718)	2022	37 of 37	UID_SEARCHBYLOC_973_11222022_234PM_IDRES.txt	Completed	Download

Lesson: How to Search by File

1. Click on the Search icon on the side navigation panel.
2. Click By File.
3. Click the appropriate criteria and click Browse.



Search Options

BY PERSON BY ID BY LOCATION **BY FILE**

Person Type: **Student** Staff

Type: **New Search File** Find Previous File Search

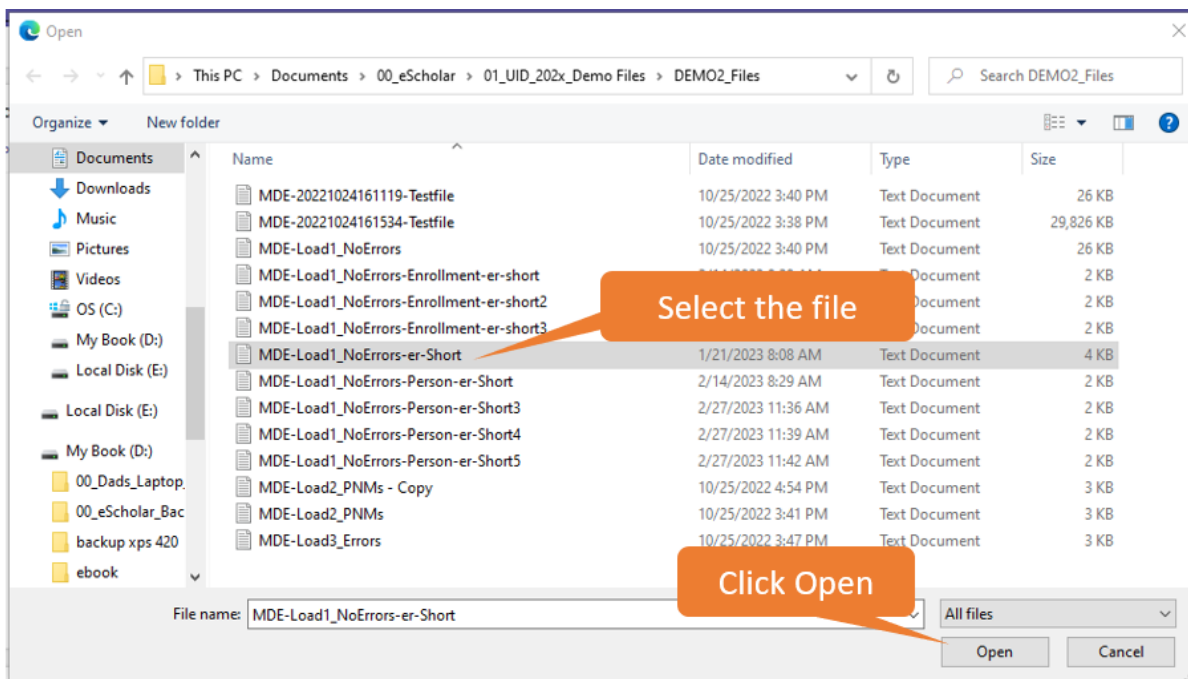
File to Upload: **Browse**

Upload Type: **Simple** Advanced

Reset **Search**

Click Browse

4. Select the file and click Open.



5. Click Search.

Search Options

BY PERSON BY ID BY LOCATION **BY FILE**

Person Type: **Student** Staff

Type: **New Search File** Find Previous File Search

File to Upload: MDE-Load1_NoErrors-er-Short.txt **Browse**

Upload Type: **Simple** Advanced

Reset Search

6. The results will be displayed. The user can download the results.

Search Results

Download the Results

Search Info	Location Info	Process Info	Record Info	Status Info	Actions
 1003 UID_3.csv File	Acadia Parish (017) Brownfields Elementary School (017018)	07/27/2022 3:00 PM	1 of 1	 Completed	 Download View search Details

[TOC](#)

Person Profile

Chapter Highlights

- [OverviewPerson Profile Header Person Profile - Overview Tab](#)
- [Person Profile – Master Record Tab](#)
- [Person Profile – History Records Tab](#)
- [Person Profile – Merged Records Tab](#)
- [Lesson: How to Access a Person Profile by a Person Search](#)

Overview

The Person Profile feature enables users to view specific details about a person, including person information, match history, and other details. This feature offers a complete picture of the person including the Master Record and any historical information that may be available for the person.

The Person Profile is accessible throughout the application wherever the person name is shown as a link, such as on the Search Results page. Most users can view a person profile, but only authorized users are able to edit a Person Profile.

The Person Profile consists of a Person Profile Header and four tabs of specific content, including the Overview, Master Record, History Records, and Merged Records tabs. Each of these are described in detail below.

A System Administrator can configure field display labels and/or disable fields, so the columns/field labels described below may vary based upon those configured values. For example, the Alternate Last Name field may be disabled and therefore not visible on the Master Record tab view.



Andrea L Hartman
Person Type(s): Student | Staff

2837736293
State ID

03/12/2020
Created

09/12/2020
Last Updated

3
History Records

2
Merged Records

2020
Enrollment Year(School Year)

OVERVIEW MASTER RECORD HISTORY RECORDS MERGED RECORDS

Master Record Highlights


Person Information

First NameAndrea

Middle NameL

Last NameHartman

Alternate Last Name

GenderFemale

Date of Birth02/01/1992

Social Security Number123-45-6789

Ethnicity IndicatorNon Hispanic

RaceWhite

State ID2837736293

Pending Near Matches
2 of 2 Pending Near Matches

Andrea Hartman

Brownfields Elementary School
Local ID: 32345

Andrea L Hartman

Brownfields Elementary School
Local ID: 12345

Person Profile Header

The Person Profile Header appears at the top of the Person Profile and will remain the same, even when changing tabs. This information enables the user to view important information about the person.



Andrea L Hartman
Person Type(s): Student | Staff

2837736293
State ID

03/12/2020
Created

09/12/2020
Last Updated

3
History Records

2
Merged Records

2020
Enrollment Year(School Year)

OVERVIEW MASTER RECORD HISTORY RECORDS MERGED RECORDS

FIELDS/DATA	DESCRIPTION
Person Name	Displays the First Name, Middle Name, and Last Name of the selected person.

FIELDS/DATA	DESCRIPTION
Person Type(s)	Displays all the person types for the person. Person Type maybe an early childhood participant, a student, staff member or workforce member.
State ID	Displays the unique State ID for the person.
Last Update Date	Displays the date the Master Record was last updated for the selected person.
Pending Near Matches	Displays the count of pending Near Matches for the selected person.
School Year	Displays the most recent school year when the Master Record was updated.

Person Profile - Overview Tab

The Overview tab serves as a dashboard for the selected person and includes Master Record Highlights, Recent History Records, and Pending Near Matches panels.

Master Record Highlights	Pending Near Matches
Person Information First Name: Andrea Middle Name: L Last Name: Hartman Alternate Last Name: Gender: Female Date of Birth: 02/01/1992 Social Security Number: 123-45-6789 Ethnicity Indicator: Non Hispanic Race: White State ID: 2837736293	2 of 2 Pending Near Matches Andrea Hartman Brownfields Elementary School Local ID: 32345 Andrea L Hartman Brownfields Elementary School Local ID: 12345

Master Record Highlights

The Master Record Highlights includes a Drill In icon button (») and Person Information. When the Drill In icon is clicked, the application will navigate to the Master Record tab. The Person Information section includes the First Name, Middle Name, Last Name, Alternate Name, Gender, DOB, SSN, Ethnicity, Race, and State ID data from the Master Record.

Pending Near Matches

The Pending Near Matches panel includes a Drill In icon button (») and list of the most recent pending near matches. When the Drill In icon is clicked, the application will navigate to the Near Match List page. The Pending Near Match list section includes the Name, School, State ID, and Local ID for each pending near match. The Actions column includes a Drill In icon button (») which will navigate to the Near Match List page for the selected Pending Near Match.

Pending Near Matches

Submission Record Oliver Jones Acadia Parish (027) Brownfields Elementary School (027018)	Date of Birth: 09/23/2001 Grade: Undergraduate Local ID: 12345	Race: White Gender: Male Social Security Number: 098-12-1133	94% Max Match Score	4 Potential Matches	»
--	---	---	---------------------	---------------------	---

1 - 1 of 1 Previous 1 Next

Legend

Match Indicators ■ Near Match	Decision Icons ✓ Match
---	----------------------------------

Recent Notes

The Recent Notes panel includes information related to any Notes for the Person. It shows the Note Date, Type, and part of the Note.

Recent Notes Notes »

Note Date	Type	Note
09/01/2020	General	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus consequat...
09/01/2020	General	Consectetur adipiscing elit.
09/01/2020	Admin	Phasellus consequat tempus erat eget volutpat. Donec vel libero, varius...
09/01/2020	Admin	Donec vel libero, varius venenatis molestie.
09/01/2020	General	Consequat tempus erat eget volutpat. Donec vel libero, varius venenatis velit...

Alias ID

Alias ID	Source System	Person Type	Status
1234	SIS	Staff	Active
344221	SPED	Student	Active
177	EC	Student	Inactive

Recent History Records »

Update Date	Name	Actions
07/01/2020	Hartman, Andrea	»
05/21/2020	Hartman, Andrea	»
04/12/2020	Hartman, Andree A	»

Alias ID

The Alias ID section shows all IDs associated with the person. The panel shows the Alias ID, Source System, Person Type, and Status of the Alias ID. A person may acquire Alias IDs over time from other source systems such as Early Childhood, K-12

student information systems, assessment, or library information systems. The UniqID system links source system IDs to an individual over time.

Recent Notes

Note Date	Type	Note
09/01/2020	General	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus consequat...
09/01/2020	General	Consectetur adipiscing elit.
09/01/2020	Admin	Phasellus consequat tempus erat eget volutpat. Donec velit libero, varius...
09/01/2020	Admin	Donec velit libero, varius venenatis molestie.
09/01/2020	General	Consequat tempus erat eget volutpat. Donec velit libero, varius venenatis velit...

Alias ID

Alias IDs

Alias ID	Source System	Person Type	Status
1234	SIS	Staff	Active
344221	SPED	Student	Active
177	EC	Student	Inactive

Recent History Records

Update Date	Name	Actions
07/01/2020	Hartman, Andrea	
05/21/2020	Hartman, Andrea	
04/12/2020	Hartman, Andree A	

Recent History Records

The Recent History Records panel shows all History records associated with the person. It shows the Update Date, the Name in the History record for the Person, and has a drilldown to link to the details of the History record.

Recent Notes

Note Date	Type	Note
09/01/2020	General	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus consequat...
09/01/2020	General	Consectetur adipiscing elit.
09/01/2020	Admin	Phasellus consequat tempus erat eget volutpat. Donec velit libero, varius...
09/01/2020	Admin	Donec velit libero, varius venenatis molestie.
09/01/2020	General	Consequat tempus erat eget volutpat. Donec velit libero, varius venenatis velit...

Alias ID

Alias ID	Source System	Person Type	Status
1234	SIS	Staff	Active
344221	SPED	Student	Active
177	EC	Student	Inactive

Recent History Records

History Records

Update Date	Name	Actions
07/01/2020	Hartman, Andrea	
05/21/2020	Hartman, Andrea	
04/12/2020	Hartman, Andree A	

Person Profile – Master Record Tab

The Person Profile – Master Record tab displays the Master Record which is the most recently updated data for the person. The content on the page is categorized into Person Details, Location Information, Matching Information, and Transaction Information. Each of these panels is described in detail below.

Person Details Panel

The Person Details Panel includes the Person Information, Contact Information, Other Information, and Customer Defined Fields sub-sections. The fields available in the Person Details Panel are:

Person Details

Person Information

First NameAndrea

Middle NameL

Last NameHartman

Suffix

Alternate Last Name

Nickname

GenderFemale

Date of Birth02/01/1992

Social Security Number123-45-6789

Ethnicity IndicatorNon-Hispanic

RaceWhite

Race 2

Race 3

Contact Information

Address 1450 Main Street

Address 2

CityCrowley

StateLouisiana

Zip70526

Geocode

Credential Information

Highest Degree Earned

Subject Matter Area

Degree Provider

Certificate Number

Certificate Type

Other Information

Birth Location

Residency Status

Residency Expiration Date

Mother's Maiden Name

Customer Defined Fields

Email

Phone

Customer Defined Field 3

Customer Defined Field 4

Customer Defined Field 5

Customer Defined Field 6

149

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Person Information

FIELDS/DATA	DESCRIPTION
First Name	Displays the legal first name of the person. Used for Matching.
Middle Name	Displays the legal middle name of the person. Used for Matching if provided.
Last Name	Displays the legal last name of the person. Used for Matching.
Suffix	Displays the suffix used for the person. Used for Matching if provided.
Alternate Last Name	Displays the alternate last name that may have been used for the person. Used for Matching if provided.
Nickname	Displays the nickname that may have been used for the person.
Gender	Displays the gender for the person. Used for Matching.
DOB	Displays the date of birth for the person. Used for Matching.
SSN	Displays the Social Security Number for the person. Used for Matching if provided.
Ethnicity	Displays the ethnicity for the person.
Race, Race 2-5	Displays the race for the person.
Ethnic Subgroup	Displays the Ethnic Subgroup for the person.
State ID	Displays the State ID assigned to the person.

Contact Information

FIELDS/DATA	DESCRIPTION	EDIT MODE DETAILS
Address 1	Displays the Address 1 for the person.	Textbox. Optional by default but may be required by a System Administrator.
Address 2	Displays the Address 2 for the person.	Textbox. Optional by default but may be required by a System Administrator.
City	Displays the City for the person.	Textbox. Optional by default but may be required by a System Administrator.
State	Displays the State for the person.	Drop down menu with valid state options. Must select one option. Optional by default but may be required by a System Administrator.
Zip	Displays the Zip Code for the person.	Textbox. Optional by default but may be required by a System Administrator.
Geocode	Displays the Geocode for the person.	Textbox. Optional by default but may be required by a System Administrator.

Other Information

FIELDS/DATA	DESCRIPTION	EDIT MODE DETAILS
Birth Location	Displays the Birth Location for the person.	Textbox. Optional by default but may be required by a System Administrator.
Residence Status	Displays the Residence Status for the person.	Drop down menu with valid residence status options. Optional by default but may be

		required by a System Administrator.
Residence Expiration Date	Displays the Residence Expiration Date for the person.	MM/DD/YYYY Date picker with a calendar selection. Optional by default but may be required by a System Administrator.
Mother's Maiden Name	Displays the Mother's Maiden Name for the person.	Textbox. Optional by default but may be required by a System Administrator.

Customer Defined Fields

FIELDS/DATA	DESCRIPTION	EDIT MODE DETAILS
CDF 1 – 8	Displays the Customer Defined Fields submitted for the person. The Customer Defined Fields will have special labels dependent on the configuration of the system.	Textbox. Optional by default but may be required by a System Administrator.
CDF Date 1	Displays the Customer Defined Field Date 1 submitted for the person.	Textbox. Optional by default but may be required by a System Administrator.
CDF Number 1	Displays the Customer Defined Field Number 1 submitted for the person.	Textbox. Optional by default but may be required by a System Administrator.
CDF Code 1	Displays the Customer Defined Field Code 1 submitted for the person.	Textbox. Optional by default but may be required by a System Administrator.

Location Information Panel

The Location Information Panel includes a listing of the locations where the person is currently enrolled.

Location Information (Student) +							
Update Date [⚙]	Enrollment Year(School Year) [⚙]	Location Info [⚙]	ID Info [⚙]	Alternate ID [⚙]	Grade [⚙]	Active/Inactive Indicator [⚙]	Actions
09/01/2020	2019	Acadia Parish (027) <i>Brownfields Elementary School (027018)</i>	1122 SIS	22 SIS	4	Active	»
09/01/2020	2019	Acadia Parish (027) <i>Cedarcrest-Southmoor Elementary School (027022)</i>	255 SIS	255 SIS	3	Active	»
09/01/2020	2019	East Baton Rouge Parish (017) <i>Center Elementary School (017018)</i>	7655 SIS	55 EC	2	Active	»
09/01/2020	2019	Franklin Parish (041) <i>Merrydale Elementary School (041058)</i>	321 EC		1	Inactive	»
09/01/2020	2019	East Baton Rouge Parish (017) <i>Claiborne Elementary School (017026)</i>	777 SPED		k	Inactive	»
1 - 5 of 7			Previous	1	2	Next	

The fields available in the Locations list are:

FIELDS/DATA	DESCRIPTION
Update Date	Displays the date the location information was updated for the person.
School Year	Displays the school year associated with the location record for the person.
Location Information	Displays the District Name, District Code, School Name and School Code for the location.
ID Info	Displays the Local Identifier and the Source System for the identifier for the location.
Alternate ID	Displays the alternate ID with the location record for the person. This column may be blank.
Grade	Displays the grade level associated with the location record for the person.
Active/Inactive Indicator	Displays the status for person at the location record.

Notes Panel

The Notes panel includes a listing of the notes associated with the person.

Notes +			
Note Date	Created By	Type	Note
09/01/2020	Allan, Scott	General	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sed metus bibendum, convallis nulla non, interdum enim. Quisque ut quam congue, faucibus dui quis, pellentesque nisl. Vivamus pharetra tortor pretium magna consectetur imperdiet. Integer accumsan orci ut diam dictum, et condimentum nisi.
09/01/2020	Campbell, Fiona	General	Consectetur adipiscing elit. Consequat tempus erat eget volutpat. Consequat tempus erat eget volutpat. Donec velit libero, varius venenatis velit. Donec velit libero, varius venenatis velit. Donec velit libero, varius venenatis velit.
09/01/2020	Bond, Max	Admin	Phasellus consequat tempus erat eget volutpat. Donec velit libero, varius venenatis molestie ut Consequat tempus erat eget volutpat. Consequat tempus erat eget volutpat. Donec velit libero, varius venenatis. Donec velit libero, varius venenatis velit.
09/01/2020	Smith, Sarah	Admin	Donec velit libero, varius venenatis molestie. Consequat tempus erat eget volutpat. Consequat tempus erat eget volutpat. Donec velit libero, varius venenatis velit. Donec velit libero, varius venenatis velit. Donec velit libero, varius venenatis velit.
09/01/2020	Watson, Harry	General	Consequat tempus erat eget volutpat. Donec velit libero, varius venenatis velit. Donec velit libero, varius venenatis velit. Consequat tempus erat eget volutpat. Donec velit libero, varius venenatis velit. Donec velit libero, varius venenatis velit.
1 - 5 of 8			
Previous 1 2 Next			

The fields available in the Notes list are:

FIELDS/DATA	DESCRIPTION
Date	Displays the date the note was created.
Created By	Displays the author of the note.
Type	Displays the type of Note.
Note	Displays the Note.

Matching and Transaction Information Panels

Matching Information	Transaction Information
Last Match Date	09/12/2020
Match Score	96
Match Decision	Match(29272711)
Match Note	Student Updated - Upper Threshold Exceeded
Match Trace	Student ID Present: Present (29272711)
Record Comments	ID Updated - Direct Edit
Record Status	Assignment: Near Match Resolution - Match Assign ID (History Created)
Transaction Type	Upload
Delimiter	Tab
Qualifier	Double Quote (")
Last Transaction ID	122
Batch ID	920
Reference ID	67488
Last Update Date	09/12/2020
Last Update User	Hartman, Andrea (ahartman@escholar.com)
ID Creation Date	09/12/2020
ID Created By	Hartman, Andrea (ahartman@escholar.com)

The Matching Information panel includes fields associated with the last match of the person. The fields available in the Matching Information panel are:

FIELDS/DATA	DESCRIPTION
Last Match Date	Displays the last date where a match decision was made.
Match Score	Displays the match score of the last match.
Match Decision	Displays the last match decision.
Match Note	Displays the last match note.
Match Trace	Displays the last match trace information.
Record Comments	Displays the last match comments.
Record Status	Displays the last match status.

The Transactions Information panel includes fields associated with the last transaction related to the person. The fields available in the Transactions Information panel are:

FIELDS/DATA	DESCRIPTION
Transaction Type	Displays the last Transaction.
Delimiter	Displays the Delimiter of the last Transaction.
Qualifier	Displays the Qualifier of the last Transaction.
Last Transaction ID	Displays the ID of the last Transaction.

FIELDS/DATA	DESCRIPTION
Batch ID	Displays the Batch ID associated with the last Transaction.
Reference ID	Displays the Delimiter of the last Transaction.
Last Update Date	Displays the Last Update Date of the last Transaction.
Last Update User	Displays the Last Person to Update the last Transaction.
ID Creation Date	Displays the Date the ID was created.
ID Created By	Displays the Person who created the ID.

Person Profile – History Records Tab

The Person Profile – History Records tab displays any History record associated with the person.

History Records							
Update Date ▾	Name ▾	Date of Birth ▾	Gender ▾	Ethnicity Indicator Race ▾	Social Security Number ▾	Location Info ▾	Actions
07/01/2020	Hartman, Andrea	02/01/1992	Female	Non-Hispanic White, Asian	123-45-6789	Acadia Parish (027) Brownfields Elementary School (027018)	»
05/21/2020	Hartman, Andrea	02/01/1990	Female	Non-Hispanic White, Asian		Acadia Parish (027) Brownfields Elementary School (027018)	»
04/12/2020	Hartman, Andree A	02/01/1990	Female	Non-Hispanic White, Asian		Acadia Parish (027) Brownfields Elementary School (027018)	»
1 - 3 of 3				Previous	1	Next	

Clicking on the Actions icon links to the History Record Details page with more information.

History Record Details (Transaction Date: 09/01/2020) <<

Person Information

First NameAndrea

Middle Name

Last NameHartman

Suffix

Alternate Last Name

Nickname

GenderFemale

Date of Birth02/01/1992

Social Security Number123-45-6789

Ethnicity IndicatorNon Hispanic

RaceWhite

Race 2Asian

Race 3

Contact Information

Address 1450 Main Street

Address 2

CityCrowley

StateLouisiana

Zip70526

Geocode

Credential Information

Highest Degree Earned

Subject Matter Area

Degree Provider

Certificate Number

Certificate Type

Other Information

Birth Location

Residency Status

Residency Expiration Date

Mother's Maiden Name

Customer Defined Fields

Email

Phone

Customer Defined Field 3

Customer Defined Field 4

Customer Defined Field 5

Customer Defined Field 6

Person Profile – Merged Records Tab

The Person Profile – Merged Records tab displays any Merged record associated with the person.

Merged Records						
Trans Date ▾	Name ▾	Date of Birth ▾	Gender ▾	Location Info ▾	Merge Info ▾	Actions
07/01/2020	Hartman, Andria S	02/01/1990	Female	Acadia Parish (027) Brownfields Elementary School (027018)	29272711 (Retired) Text for the reason here...	»
05/21/2020	Hart, Andree	01/01/1990	Female	Acadia Parish (027) Brownfields Elementary School (027018)	21271765 (Retired) Nam sed efficitur felis. Nam a sem odio. Nulla vel.	»
1 - 2 of 2				Previous 1 Next		

Clicking on the Actions icon links to the Merged Record Details page with more information.


RETIRED RECORD: This record has been retired and cannot be edited or recovered.
 29272711
State ID Retired

Merged Record Details (Retired ID)
 «

Reason
 The full reason should be displayed here before the rest of the content is displayed.


Person Information

First Name Andria
 Middle Name S
 Last Name Hartman
 Suffix
 Alternate Last Name
 Nickname
 Gender Female
 Date of Birth 02/01/1990
 Social Security Number 123-45-6789


Contact Information

Address 1 450 Main Street
 Address 2
 City Crowley
 State Louisiana
 Zip 70526
 Geocode


Credential Information

Highest Degree Earned
 Subject Matter Area


Other Information

Birth Location
 Residency Status
 Residency Expiration Date
 Mother's Maiden Name


Customer Defined Fields

Email
 Phone
 Customer Defined Field 3

Lesson: How to Access a Person Profile by a Person Search

1. A Person Profile may be accessed through a Search by Person.
2. Click on the Search icon on the side navigation panel. 
3. Select the appropriate criteria for the person you are searching.

Search Options

BY PERSON BY ID BY LOCATION BY FILE

Search Settings

Person Type:

Search In:

Match Method:

Person Information

First Name:

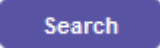
Middle Name (optional):

Last Name:

Suffix (optional):

Date of Birth (optional): 

Gender (optional):

4. Click the Search button. 

5. The Search results will be displayed.

Search Results

Grade : District : School :

State ID	Name	Date of Birth	Gender	Ethnicity Indicator / Race	Social Security Number	Grade	Location Info	ID Info	Match Score	Actions
938948987788	Fisher, Sally	09/09/2010	Female	Non-Hispanic Black	###-##-3956	4	Acadia Parish (027) Multiple Schools	006 PS	87%	

6. Click the Actions  icon to view the Person Profile.

	Andrea L Hartman				2837736293
	Person Type(s): Student Staff				State ID
03/12/2020 Created	09/12/2020 Last Updated	3 History Records	2 Merged Records	2020 Enrollment Year(School Year)	
OVERVIEW MASTER RECORD ENROLLMENT (v2023.x) HISTORY RECORDS MERGED RECORDS DIRECTMATCH					

Master Record Highlights >>	Pending Near Matches 2 of 2 Pending Near Matches	DirectMatch Pending Near Matches 2 of 2 Pending Near Matches
Person Information	Andrea Hartman Brownfields Elementary School Local ID: 32345 >>	Andrea Hartman SNAP Client Index ID: 39348853 >>
First Name: Andrea	Andrea L. Hartman Brownfields Elementary School Local ID: 12345 >>	Andrea Hartman TANF Client Index ID: 3853 >>
Middle Name: L		
Last Name: Hartman		
Alternate Last Name:		
Gender: Female		
Date of Birth: 02/01/1992		
Social Security Number: 123-45-6789		
Ethnicity Indicator: Non Hispanic		
Race: White		
State ID: 2837736293		

Lesson: How to Edit a Person Profile

1. Access the person profile. (See Lesson: How to Access a Person Profile by a Person Search.)
2. The Person Profile lands on the Overview Tab. Click the drill in icon on the Master Record Highlights panel.

Master Record Highlights

Click the Drill In Icon

Person Information	
First Name	Andrea
Middle Name	J
Last Name	Hartman
Alt Last Name	
Gender	Female
Date Of Birth	01/01/2001
Social Security Number	
Ethnicity Indicator	--
Race Ethnicity1	--
State ID	95828-71-644

3. Click the edit icon on the Person Details panel.

Person Details

Person Information

First Name

Andrea

Middle Name

J

Last Name

Hartman

Suffix

All Last Name

Full Person Name

Nickname

Gender

Female

Date Of Birth

01/01/2001

Social Security Number

Ethnicity Indicator

Race Ethnicity 1

--

Contact Information

Address 1

Address 2

City

State

Zip

Geocode

Credential Information

Highest Degree Earned

Subject Matter Area

Degree Provider

Certificate Number

Certificate Type

Other Information

Birth Location

Residency Status

Residency Expiration Date

N/A

Mother's Maiden Name

Customer Defined Fields

Street Address Physical

City Physical

State

Zip Code Physical

Parental Consent Flag

Defined Field

Test

4. Edit the information as needed.

Person Details

Person Information	Contact Information	Other Information
First Name: Andrea	Address 1 (optional):	Birth Location (optional):
Middle Name (optional): J	Address 2 (optional):	Residency Status (optional): v
Last Name: Hartman	City (optional):	Residency Expiration Date (optional): mm/dd/yyyy
Suffix (optional):	State (optional): v	Mother's Maiden Name (optional):
All Last Name (optional):	Zip (optional):	
Full Person Name (optional):	Geocode (optional):	
Nickname (optional):		
Gender: Female Female Male	Credential Information	Customer Defined Fields
Date Of Birth: 01/01/2001	Highest Degree Earned (optional): v	Street Address Physical (optional):
	Subject Matter Area (optional): v	City Physical (optional):
	Degree Provider (optional):	State (optional):
		Zip Code Physical (optional):
		Parental Consent Flag (optional):

5. Click Update to save the changes.

Date Of Birth: 01/01/2001 Social Security Number (optional): Ethnicity Indicator (optional): v Race Ethnicity1 (optional): v Race 2 Code (optional): v Race 3 Code (optional): v Race 4 Code (optional): v Race 5 Code (optional): v Ethnic Sub Group (optional): v State ID: 95828-71-644	Degree Provider (optional): Certificate Number (optional): Certificate Type (optional): v	Physical: Parental Consent Flag (optional): Defined Field (optional): Test (optional): Customer Defined Field 8 (optional): CDFDATETEST (optional): mm/dd/yyyy CDFNUMBERTEST (optional): Parental Consent Flag (optional):
---	--	--

6. Repeat the process for each additional section to edit. Remember, the user must drill into the section panel first then click the edit button. Let's look at one more example.

7. The location information panel appears below the master record panel. Click the drill in icon.

Location Information (K12 Student)						
Update Date	Ending School Session Year	Location Info	Local ID	Alternate ID	Grade Placement	Active/Inactive Indicator
06/01/2023	2023	Barton, Howell and Nolan District (6100000000) Bauch and Sons School (6006500000)	22321321 Default Testn	34 MDE Test		Active

Click the drill in icon

8. Click the edit icon.

Location Information Details (K12 Student)		
Barton, Howell and Nolan District (6100000000) Bauch and Sons School (6006500000)	06/01/2023 Last Updated	K12 Student Person Type
Ending School Session Year	2023	Grade Placement
Residing Parish Code		
Local ID	22321321	
Source System	Default Testn	
Alternate ID	34	
Alternate ID Source	MDE Test	
Active/Inactive Indicator	Active	
Source Refresh Date	N/A	
Location Comment		

Click the edit icon

9. Edit the information as needed.

Location Information Details (K12 Student)

Barton, Howell and Nolan District (6100000000) Bauch and Sons School (6006500000)	06/01/2023 Last Updated	K12 Student Person Type
---	-----------------------------------	-----------------------------------

Ending School Session Year	2023	Grade Placement	
Residing Parish Code (optional)			
Local ID	22321321		
Source System	Default Testn		
Alternate ID (optional)	34		
Alternate ID Source (optional)	MDE Test		
Active/Inactive Indicator (optional)	Active		
Source Refresh Date (optional)	mm/dd/yyyy		
Location Comment (optional)			

Click Update

Cancel Update

10. Click Update to save the changes.

11. Repeat the steps for any other edits in the person profile.

Batch Profile

Chapter Highlights

- [OverviewProfile HeaderDetails TabDownload TabLesson: How to Access a Batch Profile](#)
- [Lesson: How to Generate an Extract File from Download Options](#)

Overview

The Batch Profile displays details about the specific Batch enabling users to understand when the Batch occurred and the current status, along with other details. This feature includes a Profile Header, Details Tab and Download Tab. The Details Tab includes the Process Details, Next Steps and General Information panels. Each panel is described in detail below. The Download Tab enables users to download the Batch.

The Batch Profile page can be accessed for any Batch by clicking the Batch ID link. This link is displayed throughout the application, including on the Dashboard, Match History and Near Match List pages.

Profile Header

The Batch Profile Header displays a page title, Batch details, action button, and Details and Download tab links for the Batch.

Batch Profile Contains one or many records.	925 Batch ID	File (UID_3.csv) Submission Type	04/06/2020 3:00 PM Process Info	 Pending: Request Received Status
DETAILS DOWNLOAD				

FIELDS/DATA	DESCRIPTION
Batch ID	Displays the Batch Identifier for the selected Batch. Each Batch is assigned a unique identifier and can be referenced/searched for from the Match History component.

FIELDS/DATA	DESCRIPTION
Submission Type	Displays the option Match Option that was selected during the submission process, including Person ID, Upload File, Individual Match, Manual Authorization, and Address Match.
Process Info	Displays the date and time the Batch was submitted.
Status	Displays the current status of the Batch.
Details Tab	This is a link to view the Details content as described below.
Download Tab	This is a link to view the Download content as described below.

Details Tab

The Details tab includes Process Details, Next Steps and General Information panels as described below.

Batch Profile
Contains one or many records.

925 Batch ID File (UID_*.txt) Submission Type 04/06/2020 3:00 PM Process Info Pending: In Progress Status

DETAILS DOWNLOAD

Process Details
Displays details about processing.

Status Statistics

Match Status	Record Count
Ready to Assign IDs	10
Pending: Assignment In Progress	

Processing Stage

Stage	Processing Date
Upload Completed	03/03/2020 12:04:33 PM
Validation Started	03/03/2020 12:04:53 PM
Validation Completed	03/03/2020 12:05:33 PM
Assignment Started	03/03/2020 12:07:33 PM

Next Steps

Refresh
Download
View Transactions

General Information

District	Acadia Parish (027)
School	Brownfields Elementary School (027018)
Extract Date	N/A
Extract File	N/A
Transmission ID	N/A
Source	PS
Creation Date	05/02/2019 1:30PM

Process Details

The Process Details panel includes information about the Transaction process, such as the Status Statistics and Processing Stage. These sections provide the users with details about Match Decision statistics and the Batch Status as described below.

Status Statistics

The Status Statistics displays a breakdown of the Transaction Status for the Match Status and Record Count per status.

Status Statistics

Match Status	Record Count
Match / No Match (Completed)	
Match	15
Canceled (Completed)	
Canceled - Selected during Match Resolution stage	2
Canceled - During data validation stage	1
Ready to Resolve Near Matches (Pending)	
Near Match pending resolution	36

Processing Stage

The Processing Stage section displays a breakdown of the Stage and Processing Date for the Stage. The Processing Stages are specific stages the Submission Record passed through during the submission process, including validation, matching, and other stages. The information displayed in this section helps determine when a stage started and ended.

Processing Stage

Stage	Processing Date
Validation Started	03/03/2020 12:04:53 PM
Validation Completed	03/03/2020 12:05:33 PM
Match Completed	03/03/2020 12:15:33 PM

Next Steps

The Next Steps panel provides access to any actions that are available for the Batch. The Next Steps that may available are:

NEXT ACTION	DESCRIPTION
Continue	Indicates the Batch is not completed and is in a pause status and must be continued for it to finish processing.
Refresh	Indicates the Batch is not completed and is in a pending status. The Refresh action will refresh the status of the Transaction. The Batch will continue processing even if this action is not clicked.
Resolve	Indicates the Batch is not completed and that there is at least one pending Near Match for the Transaction and it must be resolved by a user for the Transaction to complete.
Download	Indicates the Batch has completed and can be downloaded. When the Download link is clicked, the application will navigate to the Download tab.
View Transactions	Each Batch may have one or many Transactions. When this link is clicked, the application will navigate to the Match History page with a filter for the specific Transaction.

General Information

The General Information panel provides specifics about the Batch, such as the user who submitted the Batch. The data displayed in this section includes:

FIELDS/DATA	DESCRIPTION
District	Displays the District Name and Code associated to the Submission Record/Transaction/Batch.
School	Displays the School Name and Code associated to the Submission Record/Transaction/Batch.
Extract Date	The date the file was extracted from the source system.
Extract File	The name of the extract file.
Transmission ID	A randomly generated code contained in the header and footer of the extract file. The Transmission ID is used to identify the beginning and ending of the extract file.
Source	Displays the Source Name associated to the Submission Record/Transaction/Batch.
Creation Date	Displays the date the Submission Record/Transaction/Batch was created.
Creation User	Displays the user information for the user who created the Submission Record/Transaction/Batch.
Delimiter (Record)	Displays the Delimiter for the Detail Record associated to the Submission Record/Transaction/Batch. This is used for Upload File submissions.
Delimiter (Header)	Displays the Delimiter for the Header Record associated to the Submission Record/Transaction/Batch. This is used for Upload File submissions.
File Version	Displays the File Format used to submit the Submission Record/Transaction/Batch.

Download Tab

The Download tab provides access to download the Batch and includes Download Options and Download History panels.

Download Options

The Download with Options functionality allows users to select specific download options, such as the extract template, field delimiter, field qualifier, date format and whether to include the header/footer in the file.

The Download Options panel includes a Match Status section to specify the Match Status to download and Format section to specify the format of the download file.

[DETAILS](#)
[DOWNLOAD](#)

Download Options

Match Status

Status	Match Date	Downloadable Record Count	Total Record Count
☒ Near Match	04/23/2020 13:48	2	2
☐ Near Match Details	04/23/2020 13:48	2	2

Format

Download Options

SimpleAdvanced

File Format

Version 3.0

Delimiter

TabComma

Qualifier

Double Quote (")Single Quote (')none

Date Format

mm/dd/yyyy

Include Header/Footer

YesNo

Generate Extract

FIELDS/DATA	DESCRIPTION
Match Status	The Match Status section will include all the available Match Status for the Batch, including Match, Ready to Resolve Near Matches and others. This section includes the Status, Match Date, Status Record Count, and Total Count. The Status Record Count totals are shown for each Match Status and may vary, while the Total Record Count

FIELDS/DATA	DESCRIPTION
	should be consistent. It is the total count of records in the Batch.
Download Options	Options are Simple or Advanced. Simple means the delimiters, qualifiers, etc. are set to the defaults in the downloaded file. Advanced means you can configure what the delimiter, qualifier, date format, etc. is.
File Format	The only option is File Format Version 3.0.
Delimiter	Provides a list of download delimiter options, including comma or tab. One button/option must be selected.
Qualifier	Provides a list of download qualifier options, including single quote (') or double quote ("). One button/option must be selected.
Date Format	Provides a drop-down menu with options for the download date format. One option must be selected.
Include Header/Footer	Indicates if the header/footer are included in the download file, including Yes or No. One button/option must be selected.
Generate Extract	Serves as the form submission button and will initiate the download process.

When the Download Generate Extract button is clicked, the application will display an Extract File(s) panel. This panel will list all the extracts that have been generated by the request. The Extract Files panel includes a Refresh icon , Download All link and a data grid listing all the downloads.

The format of the downloaded file will match the extract file selected in the File Format option.

Download History

The Download History panel will list a record of each time the Batch was downloaded by a user, including the user and date the download was generated.

Download History	
Displays download history.	
User ID	Download Date
0000supr	03/03/2020 11:57:20 AM
RobertJohnson	04/20/2020 11:46:02 AM

Lesson: How to Access a Batch Profile

1. Click on a Batch ID link from any page in the application, including the Recent Activity panel, Match History, or Near Match List.

Recent Activity (Past 30 Days)

BATCHES TRANSACTIONS

Pending - 5 Most Recent View Past 7 Days View All »

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
 921 UID_921 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	 Pending: Request Queued	Refresh
 921 UID_921 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	 Pending: In Progress	Refresh
 921 UID_921 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 2 PENDING	 Pending: In Progress	Refresh
 920 UID_920 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	 Pending: Near Matches	Resolve
 920 UID_920 File	Multiple Districts Multiple Schools	04/02/2020 3:00 PM	1000 of 190,002 PENDING	 Pending: Near Matches	Resolve

Completed - 5 Most Recent View Past 7 Days View All »

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
1003 Search	Acadia Parish (027) Brownfields Elementary School (027018)	07/27/2022 3:00 PM	1 of 1	 Completed	

2. The application will navigate to the Batch Profile for the selected Batch.

Batch Profile
Contains one or many records.

Details and Download Tabs

921 Batch ID | File (UID_921.txt) Submission Type | 04/05/2020 3:00 PM Process Info |  Pending: In Progress Status

DETAILS **DOWNLOAD**

Process Details
Displays details about processing.

Status Statistics

Match Status: Ready to Assign IDs | Pending: Assignment In Progress | Record Count: 10

Processing Stage

Stage	Processing Date
Upload Completed	03/03/2020 12:04:33 PM
Validation Started	03/03/2020 12:04:53 PM
Validation Completed	03/03/2020 12:05:33 PM
Assignment Started	03/03/2020 12:07:33 PM

Next Steps

[Refresh](#) [Download](#) [View Transactions](#)

General Information

District	Acadia Parish (027)
School	Brownfields Elementary School (027018)
Extract Date	N/A
Extract File	N/A
Transmission ID	N/A
Source	PS
Creation Date	05/02/2019 1:30PM
Creation User	Andrea Hartman
Delimiter (Record)	0x09
Delimiter (Header)	0x09
File Version	3.0

3. View the Details and Download tabs as necessary.

Lesson: How to Generate Extract File from Download Options

1. Access a Batch Profile from the Batch ID link on any page in the application, including the Recent Activity panel, Match History, or Near Match List.

Recent Activity (Past 30 Days)

BATCHES **TRANSACTIONS**

Pending - 5 Most Recent View Past 7 Days View All »

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
File	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	2 of 2 PENDING	Pending: Request Queued	Refresh
File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 3 PENDING	Pending: In Progress	Refresh
921 UID_921: File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	1 of 2 PENDING	Pending: In Progress	Refresh
File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	1 of 1000 PENDING	Pending: Near Matches	Resolve
920 UID_920: File	Multiple Districts Multiple Schools	04/02/2020 3:00 PM	1000 of 190,002 PENDING	Pending: Near Matches	Resolve

Completed - 5 Most Recent View Past 7 Days View All »

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
1003 Search	Acadia Parish (027) Brownfields Elementary School (027018)	07/27/2022 3:00 PM	1 of 1	Completed	

2. View the Download tab or click the Download button.

Batch Profile
Contains one or many records.

921 Batch ID **File (UID_921.txt)** Submission Type **04/05/2020 3:00 PM** Process Info **Pending: In Progress** Status

DETAILS **DOWNLOAD** Download Tab

Process Details
Displays details about processing.

Status Statistics

Match Status	Record Count
Ready to Assign IDs	
Pending: Assignment In Progress	10

Processing Stage

Stage	Processing Date
Upload Completed	03/03/2020 12:04:33 PM
Validation Started	03/03/2020 12:04:53 PM
Validation Completed	03/03/2020 12:05:33 PM
Assignment Started	03/03/2020 12:07:33 PM

Next Steps

Refresh

Download

View Transactions

General Information

District	Acadia Parish (027)
School	Brownfields Elementary School (027018)
Extract Date	N/A
Extract File	N/A
Transmission ID	N/A
Source	PS
Creation Date	05/02/2019 1:30PM
Creation User	Andrea Hartman
Delimiter (Record)	0x09
Delimiter (Header)	0x09
File Version	3.0

3. Select the appropriate Match Status records to extract using the radio button. Only one status at a time can be downloaded.

Match Status

Status	Match Date	Status Record Count	Total Record Count
☐ Match	04/23/2020 13:48	80	100
☐ Ready to Resolve Near Matches	04/23/2020 13:48	2	100
☒ Cancelled	04/23/2020 13:48	8	100

4. Select the Download Options, such as the Delimiter.

Download Options

Match Status

Status	Submission Date	Downloadable Record Count	Total Record Count
☐ IDs Assigned (Match / No Match)	04/04/2023 12:47PM	1	1

Format

Download Type: Simple **Advanced**

File Format: Version 3.0

Delimiter: **Tab** Comma

Qualifier: Double Quotes (") **None**

Date Format: mm/dd/yyyy ▼

Include Header/Footer: **Yes** No

[Generate Extract](#)

5. Click Generate Extract.

Generate Extract

6. The application will display a list of extracts generated by the request. This may be one or many extracts, depending on the download request.

Extract File (1)

Extract Date	Location Info	Record Count	Extract Name	Extract Status	Actions
04/06/2020 3:00 PM	Acadia Parish (027) Brownfields Elementary School (027018)	2 of 2	pid_search_1003_04232020_131402_ide_can.txt	Completed	Download

7. Click the Download link in the Extract File(s) panel for the specific download request.

Extract File (1)

Extract Date	Location Info	Record Count	Extract Name	Extract Status	Actions
04/06/2020 3:00 PM	Acadia Parish (027) Brownfields Elementary School (027018)	2 of 2	pid_search_1003_04232020_131402_ide_can.txt	Completed	Download

8. The application will prompt the user to save the file or the web browser may automatically download the file. This step is dependent on the computer and system, not the application.

[TOC](#)

Transaction Profile

Chapter Highlights

- [OverviewProfile HeaderDetails TabDownload Tab](#)
- [Lesson: How to Access a Transaction Profile](#)
- [Lesson: How to Generate Extract File from Download Options](#)

Overview

The Transaction Profile displays details about the specific Transaction record enabling users to understand when the Transaction occurred and the current status, along with other details. This feature includes a Profile Header, Details Tab and Download Tab. The Details Tab include the Process Details, Next Steps and General Information panels. Each panel is described in detail below. The Download Tab enables users to download the Transaction.

The Transaction Profile page can be accessed for any Transaction by clicking the Transaction ID link. This link is displayed throughout the application, including on the Dashboard, Match History and Near Match List pages.

Profile Header

The Transaction Profile Header displays a page title, Transaction details, action button, and Details and Download tab links for the Transaction.

Transaction Profile Contains one record.	924 Transaction ID	Web Services Submission Type	04/06/2020 3:00 PM Process Info	925 Related Batch	Completed << Status
DETAILS DOWNLOAD					

FIELDS/DATA	DESCRIPTION
Transaction ID	Displays the Transaction Identifier for the selected Transaction. Each Transaction is assigned a unique identifier and can be referenced/searched for from the Match History component.
Submission Type	Displays the option Match Option that was selected during the submission process, including Person ID, Upload File, Individual Match, Manual Authorization, and Address Match.
Process Info	Displays the date and time the Transaction was submitted.
Related Batch	If the Transaction is part of a Batch, the Batch Identifier will be displayed. If the Transaction was a single Transaction, no Batch Identifier will be displayed.
Status	Displays the current status of the Transaction.
Details Tab	This is a link to view the Details content as described below.
Download Tab	This is a link to view the Download content as described below.

Details Tab

The Details tab includes Process Details, Next Steps and General Information panels as described below.

Batch Profile
Contains one or many records.

925
Batch ID

File (UID_S.txt)
Submission Type

04/06/2020 3:00 PM
Process Info

Pending: In Progress
Status

DETAILS

DOWNLOAD

Process Details

Next Steps

Process Details
Displays details about processing.

Status Statistics

Match Status	Record Count
Ready to Assign IDs	
Pending: Assignment In Progress	10

Processing Stage

Stage	Processing Date
Upload Completed	03/03/2020 12:04:33 PM
Validation Started	03/03/2020 12:04:53 PM
Validation Completed	03/03/2020 12:05:33 PM
Assignment Started	03/03/2020 12:07:33 PM

Next Steps

Refresh

Download

View Transactions

General Information

District	Acadia Parish (027)
School	Brownfields Elementary School (027018)
Extract Date	N/A
Extract File	N/A
Transmission ID	N/A
Source	PS
Creation Date	05/02/2019 1:30PM

Process Details

The Process Details panel includes information about the Transaction process, such as the Status Statistics and Processing Stage. These sections provide the users with details about Match Decision statistics and the Transaction Status as described below.

Status Statistics

The Status Statistics displays a breakdown of the Transaction Status for the Match Status and Record Count per status. Since a Transaction is a single record, the Status Statistics should display only one status for the record, such as Match with a record count of 1.

Status Statistics

Match Status	Record Count
Match / No Match (Completed)	
Match	1

Processing Stage

The Processing Stage section displays a breakdown of the Stage and Processing Date for the Stage. The Processing Stages are specific stages the Submission Record passed through during the submission process, including validation, matching, and other stages. The information displayed in this section helps determine when a stage started and ended.

Processing Stage

Stage	Processing Date
Validation Started	03/03/2020 12:04:53 PM
Validation Completed	03/03/2020 12:05:33 PM
Match Completed	03/03/2020 12:15:33 PM

Next Steps

The Next Steps panel provides access to any actions that are available for the Transaction. The Next Steps that may available are:

NEXT ACTION	DESCRIPTION
Continue	Indicates the Transaction is not completed and is in a pause status and must be continued for it to finish processing.
Refresh	Indicates the Transaction is not completed and is in a pending status. The Refresh action will refresh the status of the Transaction. The Transaction will continue processing even if this action is not clicked.
Resolve	Indicates the Transaction is not completed and that there is at least one pending Near Match for the Transaction and it must be resolved by a user for the Transaction to complete.
Download	Indicates the Transaction has completed and can be downloaded. When the Download link is clicked, the application will navigate to the Download tab.

NEXT ACTION	DESCRIPTION
View Batch Profile	If the Transaction is associated to a Batch, the View Batch Profile link will be available. If this link is not visible, the Transaction is not associated to a Batch.

General Information

The General Information panel provides specifics about the Transaction, such as the user who submitted the Transaction. The data displayed in this section includes:

FIELDS/DATA	DESCRIPTION
District	Displays the District Name and Code associated to the Submission Record/Transaction.
School	Displays the School Name and Code associated to the Submission Record/Transaction.
Extract Date	The date the file was extracted from the source system.
Extract File	The name of the extract file.
Transmission ID	A randomly generated code contained in the header and footer of the extract file. The Transmission ID is used to identify the beginning and ending of the extract file.
Source	Displays the Source Name associated to the Submission Record/Transaction.
Creation Date	Displays the date the Submission Record/Transaction was created.
Creation User	Displays the user information for the user who created the Submission Record/Transaction.

FIELDS/DATA	DESCRIPTION
Delimiter (Record)	Displays the Delimiter for the Detail Record associated to the Submission Record/Transaction. This is used for Upload File submissions.
Delimiter (Header)	Displays the Delimiter for the Header Record associated to the Submission Record/Transaction. This is used for Upload File submissions.
File Version	Displays the File Format used to submit the Submission Record/Transaction.

Download Tab

The Download tab provides access to download the Transaction Record and includes Download Options and Download History panels.

The screenshot shows the 'Download' tab in the application. It features two main panels: 'Download Options' on the left and 'Download History' on the right. The 'Download Options' panel includes a 'Match Status' section with three radio buttons: 'Canceled', 'Fixed Errors', and 'IDs Assigned (Match / No Match)'. The 'IDs Assigned' option is selected. Below this is a 'Format' section with 'Simple' and 'Advanced' tabs, and a 'Generate Extract' button. The 'Download History' panel displays a table of download records.

User ID	Download Date
supr@school1.edu	05/03/2020 11:57:20 AM
RobertJohnson@school2.edu	04/20/2020 11:46:02 AM
swilton@school2.edu	04/19/2020 09:10:00 AM
RobertJohnson@school2.edu	04/18/2020 01:34:11 PM
RobertJohnson@school2.edu	04/18/2020 10:42:13 AM
asmith@school2.edu	04/15/2020 04:16:05 PM
psmith@school5.edu	04/10/2020 11:00:36 AM
RobertJohnson@school2.edu	04/09/2020 10:46:45 AM

Download Options

The Download with Options functionality allows users to select specific download options, such as the extract template, field delimiter, field qualifier, date format and whether to include the header/footer in the file.

The Download Options panel includes a Match Status section to specify the Match Status to download and Format section to specify the format of the download file.

The screenshot shows the 'Download Options' panel. It includes a 'Match Status' section with a table showing the selected status 'IDs Assigned (Match / No Match)' with a submission date of '04/04/2023 12:47PM' and record counts of 1. Below this is a 'Format' section with various settings: 'Download Type' (Simple/Advanced), 'File Format' (Version 3.0), 'Delimiter' (Tab/Comma), 'Qualifier' (Double Quotes (")/None), 'Date Format' (mm/dd/yyyy), and 'Include Header/Footer' (Yes/No). A 'Generate Extract' button is located at the bottom right.

Status	Submission Date	Downloadable Record Count	Total Record Count
☐ IDs Assigned (Match / No Match)	04/04/2023 12:47PM	1	1

FIELDS/DATA	DESCRIPTION
Match Status	For a Transaction the Match Status section will include one match option such as Match. This section includes the Status, Match Date, Status Record Count, and Total Count. For a Transaction, these counts should be 1.
File Format	The only option is File Format Version 3.0.
Delimiter	Provides a list of download delimiter options, including comma or tab. One button/option must be selected.
Qualifier	Provides a list of download qualifier options, including single quote (') or double quote (") or none. One button/option must be selected.
Date Format	Provides a drop-down menu with options for the download date format. One option must be selected.
Include Header/Footer	Indicates if the header/footer are included in the download file, including Yes or No. One button/option must be selected.
Generate Extract	Serves as the form submission button and will initiate the download process.

When the Download Generate Extract button is clicked, the application will display an Extract File(s) panel. This panel will list all the extracts that have been generated by the request. The Extract Files panel includes a Refresh icon (), Download All link and a data grid listing all the downloads.

The format of the downloaded file will match the extract file selected in the File Format option.

Download History

The Download History panel will list a record of each time the Transaction was downloaded by a user, including the user and date the download was generated.

Download History	
Displays download history.	
User ID	Download Date
0000supr	03/03/2020 11:57:20 AM
RobertJohnson	04/20/2020 11:46:02 AM

Lesson: How to Access a Transaction Profile

1. Click on a Transaction ID link from any page in the application, including the Recent Activity panel, Match History, or Near Match List.

Recent Activity (Past 30 Days) 🔄

BATCHES **TRANSACTIONS** Transactions Tab

Pending - 5 Most Recent Transaction ID Link View Past 7 Days View All »

Transaction Info	Location Info	Process Info	Batch ID	Status Info	Actions
12319 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	922	Pending: In Progress	Refresh
12316 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	921	Pending: In Progress	Refresh
12314 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	920	Pending: Near Matches	Resolve
12313 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	920	Pending: Near Matches	Resolve
12311 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/02/2020 3:00 PM	918	Pending: Near Matches	Resolve

Completed - 5 Most Recent View Past 7 Days View All »

Transaction Info	Location Info	Process Info	Batch ID	Status Info	Actions
12334 Search	Acadia Parish (027) Brownfields Elementary School (027018)	07/27/2022 3:00 PM	1003	Completed	
12333 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	1002	Completed	
12332 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	1002	Completed	

2. The application will navigate to the Transaction Profile for the selected Transaction.

Transaction Profile
Contains one record.

12313 Transaction ID **File** Submission Type **04/03/2020 3:00 PM** Process Info **920** Related Batch **Pending: Near Matches** Status

PERSON **DETAILS** **DOWNLOAD** Transaction Details and Download Tabs

Process Details
Displays details about processing.

Status Statistics

Match Status	Record Count
Ready to Resolve Near Matches/Duplicates	
Pending: Assignment Near Match Resolution In Progress	1

Processing Stage

Stage	Processing Date
Upload Completed	03/03/2020 12:04:33 PM
Validation Started	03/03/2020 12:04:53 PM
Validation Completed	03/03/2020 12:05:33 PM
Assignment Started	03/03/2020 12:07:33 PM
Assignment Completed	03/03/2020 12:08:45 PM
Resolve Near Match Started	03/03/2020 12:09:50 PM

Next Steps

[Resolve](#)
[Download](#)
[View Batch Profile](#)

General Information

District	Acadia Parish (027)
School	Brownfields Elementary School (027018)
Extract Date	N/A
Extract File	N/A
Transaction ID	N/A
Source	PS

3. View the Details and Download tabs as necessary.

Lesson: How to Generate Extract File from Download Options

1. Click on a Transaction ID link from any page in the application, including the Recent Activity panel, Match History, or Near Match List.

Recent Activity (Past 30 Days) 🔄 >>

BATCHES **TRANSACTIONS** Transactions Tab

Pending - 5 Most Recent Transaction ID Link View Past 7 Days View All >>

Transaction Info	Location Info	Process Info	Batch ID	Status Info	Actions
12319 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	922	Pending: In Progress	Refresh
12316 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/05/2020 3:00 PM	921	Pending: In Progress	Refresh
12314 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	920	Pending: Near Matches	Resolve
12313 File	Acadia Parish (027) Brownfields Elementary School (027018)	04/03/2020 3:00 PM	920	Pending: Near Matches	Resolve
12311 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/02/2020 3:00 PM	918	Pending: Near Matches	Resolve

Completed - 5 Most Recent View Past 7 Days View All >>

Transaction Info	Location Info	Process Info	Batch ID	Status Info	Actions
12334 Search	Acadia Parish (027) Brownfields Elementary School (027018)	07/27/2022 3:00 PM	1003	Completed	
12333 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	1002	Completed	
12332 AFP	Acadia Parish (027) Brownfields Elementary School (027018)	04/06/2020 3:00 PM	1002	Completed	

- Select the appropriate Match Status records to extract using the radio button. Only one status at a time can be downloaded.

Match Status

Status	Match Date	Status Record Count	Total Record Count
☒ Match	04/23/2020 13:48	1	1

- Click the button/option for each field in the Download Options section, such as the File Format and Delimiter.

Download Options

Match Status

Status	Submission Date	Downloadable Record Count	Total Record Count
☐ IDs Assigned (Match / No Match)	04/04/2023 12:47PM	1	1

Format

Download Type: Simple Advanced

File Format: Version 3.0

Delimiter: Tab Comma

Qualifier: Double Quotes (") None

Date Format: mm/dd/yyyy

Include Header/Footer: Yes No

Generate Extract

- Click Generate Extract.

Generate Extract

- The application will display a list of extracts generated by the request. This may be one or many extracts, depending on the download request.

Extract File (1)					
Extract Date	Location Info	Record Count	Extract Name	Extract Status	Actions
04/06/2020 3:00 PM	Acadia Parish (027) Brownfields Elementary School (027018)	2 of 2	pid_search_1003_04232020_131402_ide_can.txt	Completed	Download

- Click the Download link in the Extract File(s) panel for the specific download request.

Extract File (1)					
Extract Date	Location Info	Record Count	Extract Name	Extract Status	Actions
04/06/2020 3:00 PM	Acadia Parish (027) Brownfields Elementary School (027018)	2 of 2	pid_search_1003_04232020_131402_ide_can.txt	Completed	Download

- The application will prompt the user to save the file, or the web browser may automatically download the file. This step is dependent on the computer and system, not the application.

[TOC](#)

Location Profile

Chapter Highlights

- [OverviewProfile HeaderDetails TabLesson: How to Access a Location Profile](#)
- [Lesson: How to Download Person Records by Location](#)

Overview

The Location Profile provides details about a specific location in the application. This profile includes a Profile Header and Details Tab as described below. A Location can be a District or School. The Location Profile is available to all users by clicking the District Name or School Name link throughout the application.

The screenshot displays the 'Location Profile' for 'Acadia Parish'. At the top, the header section includes the location name, address (2402 N Parkerson Ave, Crowley, LA 70526), contact email (ron.smith@acadiaparis.com), and phone number ((222) 456-3422). To the right, a summary table shows the location's status and record counts.

Active Status	8/25/2017 Start Date	N/A End Date	10,550 Records
Active	8/25/2017	N/A	10,550

Below the header, there are two tabs: 'DETAILS' (selected) and 'DOWNLOAD PERSON RECORDS'. The 'DETAILS' tab is further divided into 'General' and 'Location Information'. The 'General' tab is currently active, showing 'View General Profile Information'. The 'Location Information' section contains a table with the following data:

Location Information	Value
District Name	Acadia Parish
District Code	027
Address	2402 N Parkerson Ave,
City	Crowley
State	Louisiana
Zip	70526

Below the location information, there is a 'Contact Information' section with the following details:

Contact Information	Value
First Name	Ron
Last Name	Smith
Title	Superintendent
Email	ron.smith@acadiaparis.com
Email 2	
Phone	(222) 456-3422
Fax	

On the right side of the profile, there is a 'Next Steps' section with a button labeled 'Download Person Records for this location'.

Profile Header

The Location Profile Header displays the Location Name, Address, Contact Email, Contact Phone, Status, Start Date, End Date, action button, and a Details tab.

Acadia Parish 2402 N Parkerson Ave, Crowley, LA 70526	 ron.smith@acadiaparish.com  (222) 456-3422	Active Status	8/25/2017 Start Date	N/A End Date
DETAILS				

FIELDS/DATA	DESCRIPTION
Location Name	Displays the full name, current Address 1, City, State, and Zip Code for the selected location.
Contact Email	Displays the email address for the contact person within the location.
Contact Phone	Displays the contact phone number for the location.
Status	Displays the current status of the Location including Active or Inactive.
Start Date	Displays the recorded start date for the location.
End Date	Displays the recorded end date for the location. If no end date is available, "N/A" will be displayed.
Details Tab	This is a link to view the Details content as described below.

Details Tab

The Details tab includes a General Information panel which includes Location Details and Contact Information sections.

General Information

The General Information panel includes detailed information about the location, such as the location name and address information as described below.

FIELDS/DATA	DESCRIPTION
Name	Displays the full name for the selected location. If the location is a School, the District name will also be displayed.
Code	Displays the local code for the selected location.
Address	Displays the street address for the selected location.
City	Displays the city for the selected location.
State	Displays the state for the selected location.
Zip	Displays the zip code for the selected location.

Contact Information

The Contact Information panel includes detailed contact information for the location, such as the name and contact information as described below.

FIELDS/DATA	DESCRIPTION
First Name	Displays the First Name of the contact person for the selected location.
Last Name	Displays the Last Name of the contact person for the selected location.
Title	Displays the Title of the contact person for the selected location.
Email	Displays the email address for the contact person for the selected location.
Email 2	Displays a secondary email address for the selected location.

FIELDS/DATA	DESCRIPTION
Phone	Displays the contact phone number the location.
Fax	Displays the contact fax number the location.

Lesson: How to Access a Location Profile

1. Click on a Location Name link from any page in the application, including the Recent Activity panel, Match History, or Near Match List.

Recent Activity (Past 30 Days) ↻ »

BATCHES **TRANSACTIONS**

Pending - 5 Most Recent Location Name View Past 7 Days View All »

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
925 UID_S.txt File	Acadia Parish (027) <i>Brownfields Elementary School (027018)</i>	04/06/2020 3:00 PM	2 of 2 PENDING	 Pending: Request Queued	Refresh ⋮
922 UID_922.txt File	Acadia Parish (027) <i>Brownfields Elementary School (027018)</i>	04/05/2020 3:00 PM	1 of 3 PENDING	 Pending: In Progress	Refresh ⋮

2. The application will navigate to the Location Profile for the selected Location.

Home > Location Information ?

Acadia Parish
 2402 N Parkerson Ave,
 Crowley, LA 70526

ron.smith@acadiaparish.com
 (222) 456-3422

Active
 Status

8/25/2017
 Start Date

N/A
 End Date

10,550
 Records

DETAILS **DOWNLOAD PERSON RECORDS**

General
 View General Profile Information

Next Steps
[Download Person Records for this location](#)

Location Information

District Name: Acadia Parish

District Code: 027

Address: 2402 N Parkerson Ave,

City: Crowley

State: Louisiana

Zip: 70526

Contact Information

First Name: Ron

Last Name: Smith

3. View the Details and Download tabs as necessary.

Lesson: How to Download Person Records by Location

1. Click on a Location Name link from any page in the application, including the Recent Activity panel, Match History, or Near Match List.

Recent Activity (Past 30 Days) 🔄 >>

BATCHES **TRANSACTIONS**

Pending - 5 Most Recent View Past 7 Days View All >>

Batch Info	Location Info	Process Info	Record Info	Status Info	Actions
 925 UID_S.txt File	Acadia Parish (027) <i>Brownfields Elementary School (027018)</i>	04/06/2020 3:00 PM	2 of 2 PENDING	 Pending: Request Queued	Refresh ⋮
 922 UID_922.txt File	Acadia Parish (027) <i>Brownfields Elementary School (027018)</i>	04/05/2020 3:00 PM	1 of 3 PENDING	 Pending: In Progress	Refresh ⋮

2. The application will navigate to the Location Profile for the selected Location.

Home > Location Information ?

Acadia Parish
 2402 N Parkerson Ave,
 Crowley, LA 70526

 ron.smith@acadiaparish.com
 (222) 456-3422

Active
Status

8/25/2017
Start Date

N/A
End Date

10,550
Records

DETAILS **DOWNLOAD PERSON RECORDS**

General
 View General Profile Information

 **Location Information**

District Name **Acadia Parish**

District Code **027**

Address **2402 N Parkerson Ave,**

City **Crowley**

State **Louisiana**

Zip **70526**

 **Contact Information**

First Name **Ron**

Last Name **Smith**

Next Steps

[Download Person Records for this location](#)

3. Click Download Person Records for this location under the Next Steps Panel.

Home > Location Information ?

Acadia Parish
2402 N Parkerson Ave,
Crowley, LA 70526

 ron.smith@acadiaparish.com
 (222) 456-3422

Active
Status

8/25/2017
Start Date

N/A
End Date

10,550
Records

DETAILS **DOWNLOAD PERSON RECORDS**

General
View General Profile Information

 **Location Information**

District NameAcadia Parish

District Code027

Address2402 N Parkerson Ave,

CityCrowley

StateLouisiana

Zip70526

 **Contact Information**

First NameRon

Last NameSmith

Next Steps

[Download Person Records for this location](#)

Click Download Person Records under Next Steps

4. Click Download.

Download Options

 **Format**

File FormatVersion 3.0

Delimiter

Tab

Comma

Qualifier

Double Quotes (")

None

Date Format

mm/dd/yyyy

▼

Include Header/Footer

Yes

No

Click Download

Cancel

Download

195

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